



## Contributions to the panels

European Conference “Regional Partnerships for Lifelong Learning –  
Structural Innovations in Education and Training”

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Regional Partnerships  
for Lifelong Learning  
Berlin, 08. / 09.11.2004

**Structural Innovations  
in Education and Training**



**THIS BROCHURE** includes the introductory remarks, the scenarios and the summaries of the contributions to the panels.

The introductory remarks at the beginning of each chapter provide a general overview of the topics addressed by the panels. In their second part, the chapters present the scenarios of special educational situations of individual target groups and their concrete educational needs. The third part of the chapters includes the summaries of the contributions of the speakers as well as of the learning regions and the R3L networks. The e-mail addresses of the speakers can be found at the end of the summaries of their contributions.



## **Panel No. 01**

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Implementation of  
lifelong guidance

## Introduction

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Education consulting at a European level has been attributed growing importance since the year 2000 as it plays a key part in the promotion of lifelong learning. At the end of 2002 the European Commission set up an expert group with respect to issues of lifelong guidance (Life long Guidance Expert Group, LGEG) to inform the Commission concerning matters of lifelong learning in the course of the implementation of the council decision on the promotion of increased European cooperation in the areas of professional training and the follow-up measures. The recommendations of the Expert Group and the results of the consultation process with respect to the Memorandum of the European Commission concerning Lifelong Learning (compare Council Resolution CEDEFOP, 2002, Panorama; Consultation Process with respect to the memorandum of the European Commission concerning lifelong learning – analysis of the country reports; Council Resolution and of the representatives of the Member States meeting within the Council on Strengthening Policies, Systems and Practices in the field of Guidance throughout life in Europe, May 2004) jointly refer to the immense significance, which the issue of lifelong guidance is now attributed by all the European member states. It is indeed true that every member state implements lifelong guidance strategies using differing regional approaches, but they represent reactions to comparable problem issues at the same time.

The present guidance structures and offers are predominantly characterised by differentiation and a lack of clarity. On the one hand they are specialised in terms of the sectors towards differing target and age groups and thus towards life and training phases that are respectively different. At the same time existing guidance structures must be in line with the ever changing demands. The demand for flexible solutions to determine the qualification requirements and guidance for the planning and implementation for (further) training offers is increasing from the point of view of business enterprises and training institutions. In addition the mobility of training guidance has become an important factor in the light of the considerable quantitative differences in terms of the offers of urban and rural areas. Differentiation between professional and training biographies, changed qualification requirements in the training and employment system and the increasing demands for flexible learning and (training) education options demand innovative solutions during the (re)orientation of the training guidance of tomorrow.

Along with the stated problems of differentiation and a lack of clarity both in terms of the individuals and also in terms of demand (the business enterprises and the education and training institutions) reference is made at the same time to the key challenge, which education and training guidance must come to terms with in the future. Integrated guidance models are required, which accommodate the individualisation of the situations in life and are oriented towards the overall biography of their clientele in this process. The removal of the boundaries of guidance focused on education and training sectors and transition processes (for degree course guidance, professional training guidance; further training guidance), which provides orientation whilst taking account the competencies and requirements of their clientele and is transparent, should open up a successful educational and qualification path for more people in the long term and thus increase their participation in lifelong learning. In this process the education and training guidance of tomorrow must take account of the fact that a sufficient linking up with the specific social requirements is made possible by generating transparency and individual requirements. In this case the entire education and training biography of the clientele as well as their ability to take the next steps of (further) education and training and qualification in a self-determined manner based on more proactive guidance, should be considered to just the same extent as the orientation towards specific social and economic requirements.

Regional network partnerships can coordinate and match the existing guidance activities and guidance activities that must be newly implemented, in particular in terms of the initial guidance, and thus structure the individual guidance process in a more targeted manner in overall terms. They have the necessary resources to install a comprehensive information and guidance offer with differentiated services for the differing requirements of the parties making the demands. Due to the increasing disappearance of statutory standards cooperative, innovative guidance structures and instruments must ensure the cross-education and cross-training sector, inter-authority, interdisciplinary qualification of the parties providing guidance and quality standards of the guidance. The documentation of the guidance process and its evaluation constitute a basic requirement in this process to achieve the constant improvement of the guidance process. The requirement of the comparability of the competencies of the clientele and also the acknowledgement of informal learning successes make standards that record and document competencies necessary.

#### **Discussion point / key issues**

The following issues must be discussed in terms of the structural level:

- Which requirements make cross-education and cross-training sector and inter-authority guidance necessary, whereby the public and private protagonists of the education and training sector and the demand side (business enterprises) cooperate at a local level.
- How must an information management system be set up, which ensures the transparency of the offers?
- How must a quality management system be organised, which makes orientation easier and contains guidance standards?
- Which qualifications on the part of the consultants, who possess professional consultancy expertise and who the guidance offices can make use of in a flexible manner, must be developed?

The following issues must be discussed in terms of the instruments used:

- How can we succeed in providing groups, which do not have an educational and training background, with access to education and training guidance?
- Which methods must be developed with the help of which the overall education and training biography of the clientele will be considered in the guidance process?
- How can competencies (including informal competencies) be documented in a visible and transparent manner for the demand side?
- Which instruments (e.g. online consultancy / education and training databases) can make a contribution towards improving the geographical range of guidance offers?
- Which financing models are promising for the (new) guidance offices?

## Scenario

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Birgit S. is 20 years old and lives in Berlin. She was educated at a Berlin comprehensive school. She always found reading and writing difficult, and only just scraped through the Hauptschulabschluss (basic school qualification). Nevertheless after a long period sending off applications, she managed to start a hairdressing traineeship. Shortly after starting the traineeship, Birgit became pregnant and was unable to complete the traineeship. Birgit then became a housewife, living with her boyfriend and her daughter Lisa, who is now three years old, in a small two-bedroom flat in the Neukölln district of Berlin. When her boyfriend left her, refusing to even contribute financially to Lisa's upkeep, Birgit was faced with the challenge of paying her own and Lisa's way. She would like to go to work rather than being reliant upon income support but the child has to be looked after somehow and nursery places are expensive. In addition, Birgit does not know what kind of work she can do, struggling as she is with reading and writing, and not possessing any proper qualifications. Her favourite option would be to take up the hairdressing traineeship again, but the low wages during the training period would not pay the monthly bills.

Birgit who was in despair at this point in time asked a neighbour, "What can I do now?". "The other day I walked past a shop in Karl Marx Straße, it was called a 'LernLaden' or something like that. They had a poster in the window and I think you can go there for help if you want to learn a trade or work," said the neighbour. So Birgit went with her daughter to the LernLaden described by her neighbour and went in. Over a cup of coffee she told the advisor about her situation, and together they developed a "learning and education plan" for Birgit. First of all, the reading and writing problems have to be tackled. The advisor told Birgit about a literacy course lasting several weeks, where single mothers can improve their reading and writing skills, whilst her children are looked after and enrolled there. The prospects of meeting her goal will help her to successfully achieve the next step. And if she wants to change her goals after successfully completing her training then she now already knows where she can obtain assistance.

## Abstracts

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### ► GARETH DENT

#### Developing Distance Based Guidance Services

This presentation will trace the development of the learndirect advice service in the UK. The service is a telephone and web-based advice and guidance system aimed at adults. Since launch in 1998 more than 6m people have rung the freephone number and the service now regularly attracts 5m web users each year.

In order to establish the service we have had to develop resources which were never previously available in the UK; most important of these is a national database of adult learning which includes details of over 1m courses.

The service now employs over 250 advisers and we have also had to develop a career structure and training programme specifically designed to take the best from traditional guidance practice, while being fit for the demands of a service operating 14 hours a day, seven days a week. The service aims to be widely accessible and the presentation will look at some of the approaches to marketing. The presentation will look at how quality is developed and assessed and will include a short demonstration of the web service.

*Gareth Dent, Learndirect, United Kingdom, gdent@ufi.com*

### ► MILLAR MACDONALD

The Lisbon Strategy (March 2000) set out an aspiration for “*the most competitive and dynamic knowledge based society in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion*”. Lifelong learning is key to raising citizens’ aspirations, broadening their understanding, realising their potential and improving their employability. Too often the people who are excluded for lifelong learning are those who need it and can benefit most from it. Lifelong career guidance and counselling are essential underpinning in effective and efficient lifelong learning strategies and policies. Lifelong guidance is key to removing barriers to learning and work by raising awareness and accessibility of learning and making it more attractive to those not currently engaged in learning or work. It is an effective lever in helping to improve participation, retention and progression in learning and work and provides support for labour market mobility.

Guidance and counselling has a significant role in social inclusion. It helps challenge discrimination in the labour market through challenging self and socially imposed stereotypes so that all can realise their potential. This is particularly important in reintegrating those who have become marginalised or feel excluded from mainstream society. Ministers of Education have agreed on a target to reduce by 2010 those who drop out of school and are on the margins of the knowledge society. Guidance and counselling strengthens individuals’ self belief, self confidence and self reliance. Developing citizens to help themselves is key to achieving the Lisbon goals.

Guidance services play a major role in labour market policies by acting as an interface between the supply and demand for skills. High quality labour market information and intelligence is fundamental to helping citizens make informed job, learning and career choices. It helps to ensure that employers can recruit people with the skills they need. Labour market flexibility and adaptability is particularly important in the fast changing skills needs of a dynamic economy. Guidance and counselling can help balance the needs of citizens with those of employers and the wider economy. However, guidance and counselling can only add value if it is of high quality and has competent practitioners and professionals at the heart of the services being delivered.

In England, The Skills Strategy White Paper - *21st Century Skills: Realising Our Potential* - was launched in July 2003 and sets out the skills challenge and how it will be met - [www.dfes.gov.uk/skillsstrategy](http://www.dfes.gov.uk/skillsstrategy). The Strategy aims to strengthen the UK's position as one of the world's leading economies by ensuring that employers have the skills to support the success of their business, and that employees have the necessary skills to be both employable and personally fulfilled. In order to do this we need to build a new skills alliance where every employer, employee and citizen plays their part. The White Paper recognised the importance of high quality and easily accessible information, advice and guidance on learning and work in helping citizens understand the opportunities and support available. It set out an agenda for action for the reform of information, advice and guidance services in England.

As a result, in December 2003 Ivan Lewis, Parliamentary Under Secretary of State for Skills and Vocational Education, launched the National Policy Framework and Action Plan for the reform of Information, Advice and Guidance (IAG) for Adults. This publication, produced by the Department for Education and Skills and endorsed by the Learning and Skills Council (LSC) and *Ufi leardirect*, meets a Skills Strategy commitment and sets out the range of IAG services which service users should be entitled to expect and the standards to which they should be delivered. This includes a requirement for LSC funded providers to be accredited against the *matrix* Standard for information advice and guidance services through which can be measured their quality and encouragement of continuous quality improvement.

You can view a copy of the National Policy Framework and Action Plan at <http://www.lifelonglearning.co.uk/iag/npfreport.pdf>

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**LEARNING REGION: LERNNETZ BERLIN-BRANDENBURG**  
**► REINER ASTER**

**Learning Shops as Complete and Low Level Service Offerings of the Education Guidance in the LernNetz Berlin-Brandenburg e.V.**

Three learning shops in Berlin und Brandenburg offer complete and low level education guidance, based on a uniform concept, each with a local direction, for all sectors of the population. Every person who sees the need to learn something should, with the support of the education advisors from the learn shops, have access to the education service that is most individually suitable for them. The guidance methods that are available are face-to-face guidance, own research (with assistance) via database, as well as online guidance. With the help of the guidance software all guidance processes are systematically documented. Since 2002 over 35,000 people have visited the learn shops and more than 13,000 short, as well as intensive, guidance appointments have been carried out. The learn shops also act as an intermediary between the education seeker and the education provider. The education managers in the learning shops within the regions are available to the SMIs to estimate their education needs, and are responsible for establishing and maintaining each local network. The learn shops work closely together with the employment agencies and other local institutions, like schools and colleges. They offer information events on current subjects concerning all aspects of education. An important aim is to maintain the quality of education guidance itself as well as the training and further education services provided. The 'Competence Centre for Quality Maintenance in Further Education' in the learning network of Berlin-Brandenburg gives guidance to further education providers on new requirements for quality maintenance in further education, provides information on quality maintenance systems and models and holds corresponding events concerning these matters.

*Reiner Aster, LernNetz Berlin-Brandenburg, Reiner.Aster@gsub.de*

**LEARNING REGION: LERNENDE REGION BODENSEE**► **THOMAS PETER****Quality assurance for guidance service in regional partnerships**

The aim of the "Learning Region Lake Constance" project is to establish an assortment of services offered, covering the subject matter of learning in the region. This means, based on a network of education services, the creation of guidance and informative facilities, independent of the provider, to enable citizens with all levels of qualifications and all age groups, to easily find out about different learning possibilities. All central activities, as well as those of the sub-projects, follow this aim.

An important part of this learning service is the creation and operation of a network of learning service points. This network is made up of three levels: the L-points 'Info', The L-points 'Special' and the L-points 'Guidance Centres'. Any provider, which has received the L-Quality-Certificate from the 'Learning Region Lake Constance', can become an L-point. As well as keeping up with certain quality standards, it undertakes to provide the basic learning service package. The L-point employees are prepared for their tasks through the 'learn service guidance' training. An important source of information is the internet site [www.lernsee.de](http://www.lernsee.de) with its education database. It offers an overview of the assortment of learning and education possibilities in the region, concentrating on informal learning possibilities.

In addition a hotline with one telephone number simplifies access to the information and advice offers. As well as information the learning region Lake Constance also provides intensive advice on orientation and competence development guidance. In order to, also here, guarantee the same quality everywhere, standards for the competence advisors have been defined. This knowledge also contributes to the development of uniform nationwide training for advisors on education.

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**R3L: BATHMIND**► **PAUL WHITE****Bathmind: Lifelong Learning Personal Development Planning.**

We considered generally wider issues in relation to lifelong guidance.

Question 1: Are we primarily guiding the individual to self fulfilment/self actualisation or are we looking to meet the perceived future skills needs for employers, society or education? Simplifying the two positions in this question highlights different focuses. The first assumes that society grows and changes organically from the potentialities of its populous (bottom up), the second assumes that society is best pre-planned (top down) and that individuals can be helped to fit effectively into the status quo.

Question 2: Is quality in lifelong guidance best served by uniformity or by diversity? Uniformity perhaps only fits comfortably with a top down view of society where the process is one of finding a best match between the individuals' needs and the structures (known) requirements.

Question 3: What does it mean to be user-led in lifelong guidance? Top down is closer to expert led or controlled, bottom up to direct user control. Unless we can effectively predict the future and the future's skill needs and believe society should be planned we are better off encouraging a wide diversity of approaches to lifelong guidance from which an individual can choose.

Question 4: Quality – how to ensure quality in lifelong guidance? The issue is not so much which single method or band of methods should be the chosen one but how to create a framework around the profession of lifelong guidance that would ensure quality, allowing individual's to choose from a range of diverse products differently funded.

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## **Panel No. 02**

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How best to ensure  
interlocking and  
permeability of  
educational and  
training domains

## Introduction

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The central tasks of networks with respect to the implementation of lifelong learning is the promotion of the interlocking and permeability of the education and training sectors. A problem, which emerges in all education and training systems of the EU member states, is the marked differentiation and segmentation as well as the inaccessibility of certain education and training sectors for large sections of the population that goes hand in hand with this. The promotion of lifelong learning aims to ensure that access to existing education and training sectors is made easier. To this end not only the opening up of individual education and training sectors is necessary but also the structural overlapping of existing institutions and education and training sectors. The transition between the school and the profession, access to measures of general and university education, the opening up of opportunities following periods of working abstinence caused by families and phases of unemployment to enter into education and training processes once again, are the decisive status and transition passages. It is still difficult for large sections of the population in all European member states to gain access (once again) to (new) education and training sectors. An additional challenge placed upon the education and training systems of tomorrow is represented by the demographic changes and the implicit demand that goes hand in hand with the assumption of lifelong learning that people can also gain access to education and training once again even if they are older and after having already worked in a profession. Last but not least fundamental issues of the basic qualifications and informal skills play an increasing part when assessing qualification as an entrance ticket into certain education and training sectors. The possibility of transferring learning contents into differing education and training sectors does not just enjoy great popularity on the demand-side under the key word of modularisation; learning concepts which can be implemented in a modular and flexible way are also becoming more popular for the planning and implementation of education and training offers.

The opportunity, which avails itself by means of targeted regional cooperative arrangements, for the opening up of the education and training sector and thus better permeability and interlocking, is a dual opportunity: On the one hand it can bring together education and training sectors and match them with one another against the backdrop of the respective regional requirements. At the same time regional partnerships can ensure that functioning coordination and interlocking shall be adopted within the regulatory circle of regulatory policy. In this way systematic and structural interlocking and permeability innovations can be made more widespread.

**Discussion point / key issues**

- How can the role of regional networks as transmission belts for the promotion of the interlocking and permeability of the education and training sectors be further strengthened? Which priorities can regional networks set during the interlocking of the education and training sectors? What influence can they have as multipliers in order to reveal the possible options and opportunities of changes to the regulatory policy protagonists?
- How can the transition between school and professional life be made easier? How can public and private authorities as well as business enterprises and other business enterprise sector protagonists be integrated within regional networks?
- How can the transition between the education and training sectors be made more flexible particularly against the backdrop of the latest OECD results? How can possibilities be opened up, in particular for school systems like those in Germany, to ensure people have access to university education irrespective of their socio-economic status or their origins from a specific school form?
- How can the instruments of certifying informal and non-formal learning for the promotion of transitions and permeability of the education and training sectors be further developed and standardised?
- Which structural changes are necessary to implement modular learning contents throughout various different sectors of education and training? What part can networks assume to this end at a regional level?

## Scenario

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Mohammed Bülgör is 14 years old. His parents have been living in Germany since 1994. Up until the summer of 2001, Mohammed was living with his grandmother and sisters in Anatolia, Turkey. After his grandmother suffered a stroke, she moved to Germany together with her grandchildren. Up to the beginning of the school year in September 2001, Mohammed was looking after his grandmother. His parents were unable to organize carers in that short space of time, so Mohammed assumed responsibility for his grandmother's care. Doing this he learned to look after his grandmother, to wash, feed and entertain her. What he did not have time then to learn German, and when he started school in Year Eight of a comprehensive school in the autumn, he felt alone and marginalized.

The school is cooperating with the Zollernalb Learning Region on a "mentoring programme", where pupils with social problems are provided with a mentor to help them through school life and support them in making career choices. Mohammed's mentor, Mr Schmidt, organized a German course and a work placement in a hospital for him. Mohammed's next goal is the Realschulabschluss (middle school qualification) and a traineeship at a hospital. Together, Herr Schmidt and other young people in the mentoring programme organize visits to the cinema and day trips so that Mohammed soon feels at home linguistically and socially and is able to pass the hurdle of the Realschulabschluss. Through the mentoring programme Mohammed was put in touch with the Altenpflegehilfe (elderly care scheme), which is tailored specifically to people with experience in care and with a background of migration. He attended a ten-week course which he, in part owing to the experience gained looking after his grandmother, completed with flying colours. Armed with his Realschulabschluss and a certificate, Mohammed successfully applied to an elderly people's care college and obtained a traineeship as a carer in an elderly people's home with a high percentage of Turkish senior citizens. His next goal is the Fachabitur (technical college qualification entitling holder to university entrance) and to go on to study at the Fachhochschule (technical college). Here the Learning Region Zollernalb can also help.

## Abstracts

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### ► PETER HÄRTEL

#### **Transitions become school and professional life as the basis of lifelong learning**

The successful transition from initial school education to higher vocational or general forms of education and training is of decisive significance for the success of further lifelong learning processes.

Although the first transition is dependent to a large extent upon general systemic structures, education and training systems or general framework conditions it is generally carried out in a specific regional environment and is therefore determined by integrated systemic structures and also by its respective characteristics and processes at a micro level.

It is therefore, of equal importance to structure systemic developments with respect to the interlocking, permeability, orientation and transition between school, vocational training and working life, but additionally to develop and design appropriate structures, networks and processes with respect to the specific characteristics of the regions and their special features and their conditions in economic, societal and social terms.

In this process the cooperation of all the relevant protagonists from the education and training and the employment sector is assigned decisive importance. The quality of this cooperation is ultimately legitimised by its results and effects. These must be evaluated both in quantitative terms (e.g. the quotas of successful transitions, employment of young people) and also in qualitative terms (e.g. fulfilment of the professional wishes, job satisfaction). The strongest connections with processes of sustained lifelong learning should ultimately emerge in this area.

This will be represented in this contribution by means of fundamental considerations and specific practical examples and reflected upon in terms of the subsequent consequences.

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### ► WOLFGANG JÜTTE

#### **Interlocking and Permeability as Inter-organisational Competency Management**

In the knowledge-based societies of Europe, great importance is attached to continual competence-building amongst all population groups. The goal is to make possible individual competence-development processes across the entire life span in various areas of life and work.

The differentiation of social sub-areas (schools, universities, continuing education, etc.) simultaneously demands integration efforts. Networks can form an organisational answer to the complexity of the life situations and needs of pedagogical target groups. Increased cooperation of key players in educational, employment and labour market policy as well as other political arenas should lead to the interlocking of the various areas and create new interfaces and permeability between the involved educational areas. Diverse network relationships and inter-coordinated procedures thus take the demand for integration into account.

The article first outlines how forms of horizontal and vertical cooperation can contribute to life-long competency development. In a further step, a closer look is taken at the question of how the requisite inter-organisational competency management processes can be supported during this process. Great importance is attached to altered communication patterns. Redundancy of relationships and communication requires the creation of a social system rich in synergies. Thanks to the systematic exchange of experience amongst the various key players, networks are able to eliminate the relative lack of relationships currently prevalent between the sub-systems.

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**LEARNING REGION: LERNENDE REGION ZOLLERNALB**

► **BERTRAM LOHMÜLLER**

**New Transitions in Work Life – Example From the Learning Region Zollernalb**

In the learning region of Zollernalb, approx. 30 network partners – companies, government agencies, schools, universities, educational providers, associations, chambers and social institutions – have been working to create new educational opportunities for the region since 2001. The network is characterised by a close connection to the regional economy.

“New transitions” are being tested in the following fields with the help of the regional network: Online applications for secondary modern pupils using the blended learning concept “Nellwis” (Networks of teachers, learners and business in an integrated system – discovering and supporting young people with potential and keeping them in the region) integrated into the career orientation instruction; mentoring project for supporting disadvantaged youths in career orientation and helping them recognise their own strengths; qualifying unemployed persons as home care helpers; qualifying volunteers as guides in the care sector.

The instrument for certification of informally acquired competencies is explained based on the example “Qualifying unemployed persons as home care helpers”. Building on their diverse everyday competencies, the participants will learn the latest care and home economy techniques and hone their skills for working with people from other cultures as well as with computers during the three-month course. A certificate will be of aid to those who want to subsequently complete an occupational training course to become a care taker for senior citizens. In such cases, the qualification is recognised as a “preliminary course” to the occupational training programme.

The majority of the participants who have taken part in the course until now were given a permanent job with the employers for whom they worked during the practical phases of the qualification process.

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**LEARNING REGION: LERNENDE REGION MITTLERES MECKLENBURG-KÜSTE**

► **REINHARD KASTL**

**Creativity Opens up New Perspectives - Early integration of high-performance Gymnasium (grammar school) pupils into the economy of structurally weak regions**

Structurally weak regions require high-performance, innovative young people for their economic development. Often, however, it is in particular the gifted pupils who see no career perspectives in the region. They migrate to centres of economic development and are not available where they are needed the most. This project attempts to confront these pupils with the development perspectives and problems of innovative companies in the region early on and to integrate them into the operational solution processes.

The link between theory (school) and practical areas of application (in companies) is created by classification of the regional economic fields of innovation into groups such as medical technology, logistics, technical informatics, mechanical engineering, control technology, environmental technology and alternative sources of energy. The selected pupils chose a company in line with their interests. The practically oriented professional training and instruction is provided parallel to work on the operational tasks in a course system. A transition thus occurs from the primarily externally controlled learning in short steps (school) to self-determined, success-oriented working in keeping with the demands of practice.

Previous experience with the support of approx. 50 pupils in 18 companies in the region has shown that the pupils work with greater motivation, orientation to career and university studies even in regional areas occurs, girls achieve success in technical fields and that the companies are interested in further operation integration, even during the university study period, and offer suitable career perspectives.

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**R3L: CoLABS LUND**

► **ERIK WALLIN**

**Making the Village a Campus**

In the project the “Conversity model” for 3rd mission operations for universities has been tested with some promising, “revolutionary” results. It integrates academic education with business skills training and the art of becoming a good citizen in regional context.

The model seems to work in practice and can generate high interlocking and permeability of the three learning traditions, i.e. academic education (knowledge), business training (skills) and active citizenship (attitudes). The learning regions selected for the project has been rather small, comprising villages with some thousand inhabitants, making person-to-person networking possible and effective.

The more revolutionary result is that an education process reengineering has to be made in order to be able to run the model on a larger scale. Here the whole industry of reusable learning objects and interoperability between different eLearning platforms are promising and could make eLearning an enabling technology for a more systematic education process.

The theoretical framework that has emerged as a common ground for the partners idea of learning regions is basically learning “in situ”. That means that university has not been the site for learning. Instead the villages where the grass root people are living and working have evolved into virtual learning campuses by having study circles, teamwork activities and other learning acts very close to the daily life of the local communities.

Another common ground for the partners collaboration has been problem-based learning. In fact the local villages with their small and big problems has been the principal subject matter for the learning processes.

A number of communities of practice has also evolved as means to discuss issues of relevance and to further increase the trust and shared social capital within the villages.

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## **Panel No. 03**

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Quality assurance:  
a central issue

## Introduction

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The demand that the quality of education and training be improved has received universal support from all sides. In the light of the requirements, which the accelerating technological transitions as well as the advance of globalisation place upon the societies and their education and training systems, the systematic measurement, securing and development of quality is assigned key significance. In this case it does not just concern the increased cost pressures, which frequently dominate the public discussion, but also the improved offers, which meet the requirements of the demanders in as up to date, suitable and effective a manner as possible and which can be discovered by the demanders in a targeted manner.

The approaches for a systematic improvement of the quality focus on processes at the level of teaching-learning activities just as much as the processes and products of the suppliers and the framework conditions of the educating and training systems.

Both individual learners and institutions or companies, which demand education and training, need reliable information about the quality of the education and training offers at hand to be able to make targeted autonomous decisions. To ensure the information is understood and observed it must be uniform in its form and valid throughout all the sectors.

The suppliers of training and education must speed up their organisational processes in such a way that their success is permanently inspected and the structures and sequences can be adapted if necessary in order to be able to provide offers, which continually meet the demand in terms of the content, and in organisational and methodical didactic terms, and in this process to simultaneously work economically under more difficult conditions. This constitutes an enormous challenge, in particular for smaller institutions.

The framework conditions, support structures and instruments of the regions and states must also ultimately be inspected to measure their functionality based on their levels of success and if necessary to change it. The individual regions as well as the states in Europe increasingly recognise that the improved quality of the education and training market is indispensable to ensure successful macroeconomic development. Thus the Copenhagen Declaration (2002) also stipulates that the “the promotion of cooperation during the quality assurance with a special focus upon the exchange of models and methods and also upon joint quality criteria and principles” represent a priority concern on the way to becoming the “most dynamic knowledge-based economic area” by 2010.

The endeavours to provide improved education and training quality can be linked up with comparable processes in other business sectors, but the specific properties of the “Education and training product”, which only arises from the demander itself, demands solutions that are more comprehensive than just the simple assumption of models, which are developed for other sectors.

A first approach is the protection of the consumers: As in other sectors state specifications or sector-wide self undertakings with respect to minimum standards can be used to this end. Activities with respect to the development of “Public Available Specifications” or standards for education offers and neighbouring services (e.g. databases) aim in this direction. The “Stiftung Bildungstest” (Education and training test) in Germany demonstrates how an independent inspection institution can initiate and strengthen quality assurance.

Models that have been launched are available to the institutions, to investigate, assess and improve the organisational processes in order to use the development of quality as an instrument of strategic management. In this process it is important to note to what extent these models must be adapted in order to be authoritative in specific education and training terms and to ensure they can be pragmatically implemented.

The regions, states and also the European Union are increasingly interested in merging and supporting the processes in this area. In this process a binding framework for differing, but compatible individual solutions is generally being striven for as is, for instance, the case in terms of activities at a European level: The “open methods of coordination” should guarantee that the reconstruction of the education and training systems in Europe in the wake of Lisbon process take place in accordance with the national framework conditions and traditions and can nevertheless profit from the cooperation of the member states. Within the “Quality Assurance in Vocational Education and Training (VET)” European initiative the parties are accordingly working on a “joint reference framework for the quality assurance”, which comprises joint models for the planning and evaluation, methods for inspection of self or mutual assessment as well as supplementary national or regional assessment standards (draft of conclusions of the Council with respect to quality assurance in the area of vocational education and training, 18.5.2004).

Experiences up to now have demonstrated that quality assurance and networking are mutually dependent on one another to a great extent: Regional networks in which suppliers of education and training of all types cooperate together with companies and representatives of the public sector, are indispensable for this task. On the one hand such networks make it possible to treat questions of quality appropriately in the first place, as only the cooperation of the differing parties facilitates solutions, which are meaningful in terms of their content, and their actual implementation; on the other hand regional networks with objectives specific to education and training must address the issue of quality in order to be successful – a joint understanding of education and training quality is indispensable as the basis for a partnership involving different protagonists. However, in this case the most differing approaches and ways of fleshing out these ideas are plausible depending on the specific situation on the spot and the objective.

Moreover, networks are meaningful tools to overcome the pragmatic challenges of these process and to generate the desired added value at all levels. Thus the networks can help the individual institutions by means of cooperation in a competition situation (“Competition”) to overcome the organisational changes and to use them to improve their own competitiveness; to the same extent the effective communication of the processes can only be achieved by means of binding cooperation (e.g. by means of a “Quality seal” or similar) in order to achieve the desired marketing or mobilising effects. At the same time these types of structures are seen to be effective enough to ensure each individual protagonist within a jointly stipulated framework strives to achieve meaningful solutions.

#### **Discussion point / key issues**

- Quality assurance and networks: Requirements, models, areas of potential, success factors
- Quality assurance in the network: Sequences, synergies, conflicts
- (Joint) definition of quality: Reference levels, protagonists, forms
- Quality from the point of view of the parties making the demands: What is decisive to ensure a meaningful selection?
- Quality management, controlling and reporting – objectives, indicators, reports back; potential network services
- Quality development as strategic management: Quality management to secure one’s own future viability; support structures in the network
- Regional quality circles and quality seals: Effects for parties making demands, suppliers and regions
- Quality of the network processes: Certification of networks?
- Significance of European activities for regional partnerships: Indicators, criteria, standards; European framework, tools

## Scenarios

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### Scenario I

Michaela Müller is 36 years old. On paper, Michaela's career path looks very good: Abitur (high school leaving qualification entitling her to study at university), followed by a banking traineeship, a degree in biology and a PhD completed at 29. After that she worked for two and a half years in a pharmaceutical company, the last year of which was in the area of Controlling. Upon the birth of her first daughter Michaela went on parental leave. Now, four and a half years later, her second child is at kindergarten and she would like to take up work again.

Unfortunately, Michaela is finding that her certified (scientific) expertise is now seen to be out-of-date, whilst the work she did in Controlling (beyond her training), is of interest to employers but inadequately backed up by documentation.

Michaela Müller is looking for an education programme to brush up, extend and document the business management skills she gained whilst working, in order to be able to apply more successfully for jobs in this field.

Michaela finds a whole range of business management-oriented training schemes. But which of these is the right one for her? Michaela Müller has a lot of questions:

How can she recognise trustworthy providers with fair business practices and transparent fees? Is there a combination of practical training courses, which would make it easier for her to find her way into working life. Which of these offer up-to-date teaching methods and courses matching her preferences for learning, as well as the circumstances of her day-to-day life? Which programme options are geared towards the challenges of real companies? Which certificates are well known and officially recognized? And which measures will be recognized by the Federal Employment Agency and perhaps even supported financially?

Michaela Müller is advised by her hometown's Education Network and finds out that everybody offering further training through this network has pledged to uphold minimum quality standards. This settles the question of trustworthiness.

Furthermore a range of companies refer to the need for quality certificates: Michaela hears that these providers are constantly working to improve their training options. Education providers that have acquired the Iqw certificate (learning-oriented quality testing in further training), follow a model of successful learning they have developed and determined together. Iqw and other models of quality development touch upon many other questions that Michaela has to answer. Therefore she finds information in various places which can really help her make a decision.

**Scenario II**

Gundula Bauer leads a further training organization in the Mittelhessen (central Hesse) region. She is 53 years old and very experienced as a teacher in a variety of contexts and situations. Gundula has been leading the institution, which currently employs around 30 full-time staff, for four years, with no great problems. However, fewer orders are coming in from pensions insurance providers, and in particular from the Federal Employment Agency. At the same time, there is a large amount of unrest amongst her staff. This has been putting a strain on the atmosphere at the workplace, which hitherto had been very good, and it seems to block every idea and innovation. Furthermore, most of her rivals, who she knows fairly well and up to now has had a good understanding with, are now under pressure. They hardly seemed willing to cooperate anymore and adopted increasingly aggressive competition tactics; often involving price cutting at extremely low prizes.

Gundula Bauer meets her colleagues at one of the regular network meetings to discuss these common problems. An entrepreneur who was also present at the meeting described how a quality agreement between all rivals in his sector extended the market for everyone. This path proved to be a viable one for Gundula too: by pledging minimum standards, all rivals may attract more learners and, in particular, additionally interest more companies in educational measures.

However, in itself, this is not enough. Gundula had to promote changes in her own institution and gain her staff's approval for them. For her the trigger is an external one: the association Gundula belongs to requires everybody to acquire the IqW certificate. As was to be expected, the announcement of this decision, along with calling the first staff meeting, met with little enthusiasm. Nevertheless, after the initial outcry it soon proved that the opportunity for feedback sparked off constructive teamwork. Discussing a common vision helped provide a meaningful structure to the scattered decisions of individuals, whilst looking for one's own strengths and experiences helps develop new ideas and gain new clients.

**Scenario III**

Herbert Wimmer is the local authority's business head of department in a rural region of Mecklenburg. He is strongly committed to attracting new forward-looking companies here, as the large employers of the region have been shut down. Speaking to potential investors, he can point to his region's key location in the centre of Germany, its good transport connections and, above all, to low-price property and grant opportunities. However, in most cases, the companies he would like to see here fear that they will not be able to find sufficiently qualified employees.

With the support of the Learning Region's regional network, Herbert Wimmer is able to get the providers of professional education to form a quality circle. "Education from the Region" is managed as a common quality seal, whereby everybody pledges to uphold minimum standards. Many providers are even currently working on further certifications, such as achieving ISO or LQW2. This is something many companies researching training schemes recognise from their own in-house practice. It helps Herbert Wimmer argue his case when he can assure companies that, in his region, every demand for qualification can be met swiftly and professionally.

## Abstracts

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► **PETER WILSON**

**Measuring the quality of provision for lifelong learning: some lessons from England.**

Since the early 1980s the post-school learning sector in the UK has developed a range of different measures for reassuring key stakeholders that the provision offered to learners is of good quality. These measures have gradually been extended to cover an increasing proportion of learners in the post-school sector. They have also become more instrumental, in that they are linked increasingly to targets set by central government. Thus the measures established to improve quality are tied more and more closely to the achievement of these targets, and to the continued public funding of this provision. Recently however, the usefulness of this 'outputs-based' model of quality assurance for lifelong learners is starting to be questioned.

This paper will identify some of the key features of this process of development over the past 20 years, and will question the relevance of this approach to quality assurance for future learning provision that is responsive to individual demands and to the changing needs of employment in the 21st century. The paper will highlight some of the changes in quality assurance arrangements in the post-school sector in recent years and suggest that some changes in this approach are beginning to unfold. In particular the paper will examine current developments in government policy in relation to both formal qualifications and to less formal measures of success for lifelong learners. Although the trends identified in the paper are relevant to all UK countries, the author will focus primarily on examples from the post-school sector in England.

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► **RAINER ZECH**

**Quality of education and training and the quality of the provision of education and training conditions**

1. To begin with I would like to address the difference of the quality of education and training and the quality of the provision of education and training conditions. In this process I assume that education and training is a self managed activity of learning subjects, and that it can thus not be achieved by education and training organisations but only supported.
2. Following this some statements with respect to the ability to measure or the possibility of evaluating learning successes or successful learning will follow.
3. In the third section I will briefly represent our model of learner oriented testing (LQW) in order to demonstrate how we solve the problem. In this case a link with the "European Reference Model" with its "core criteria" can be established.
4. Ultimately I would like to reveal how we organise national network work within LQWs in order to help improve not only the quality of the individual education and training organisation but also the quality of the further education sector in overall terms.

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**LEARNING REGION: LERNENDE METROPOLREGION HAMBURG**► **BETTINA KAßBAUM****Cooperative quality development amongst competitors**

**Abstract:** This article addresses the question of under which conditions joint quality development between competing education and training institutions can be successful and which opportunities and which challenges are linked with this process. In the “Flexible quality development” project of the lernende metropolregion hamburg 23 education and training institutions are jointly working on the launch of constant quality development in their organisations. The participating institutions consider the joint work to be a valuable addition despite the fact that the markets are becoming tighter and the increasing competition: the cooperation generates clear synergistic effects and the qualitative and quantitative benchmarking makes it possible to see beyond the proverbial ends of their noses. Not only a joint reference system and joint quality tools are necessary to this end. Beneficial framework conditions as well as clear cooperative agreements, whereby their observance is constantly monitored, are required. Prior experience of cooperation on the part of the parties involved is just as helpful in this process as the role of the umbrella organisation as the “cooperative agent”, which is the hub of matters and monitors the observation of agreements. The experiences of the Hamburg project demonstrate: If a basis of trust has been achieved to begin with then cooperation with respect to other topics also becomes possible and desirable. The parties will also subsequently cooperate in other areas extending beyond the field of quality for the benefit of their customers.

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**LEARNING REGION: LERNENDE EU-REGION NIEDERRHEIN**► **ALOIS BECKER****Quality assurance from the consumer’s point of view**

The debate held in the past few years about quality assurance in the area of further training was relatively one-sided, either from the viewpoint of the public grant providers or the providers of further training. It was restricted to the question of which system of quality assurance should be applied, a voluntary or a state decreed system. However, no product quality is guaranteed in this way. However, the actual “Ultimate consumers” (participants, users) are more interested in practical results. Their questions are: Which offer and which institution corresponds to my notions in terms of the content and organisation; what awaits me; which benefits do I have; which costs will arise, are they appropriate and are the contractual framework conditions faultless in legal terms. The “Lernende EU-Region Niederrhein” “Lower Rhine learning region has therefore decided to place the consumer’s view of things to the fore.

In a first step the well known and already published checklists of BIBB and DIE shall be adopted for the region and published accordingly.

In a second step a working group is attempting to draft criteria for consumer-friendly terms and conditions of business with the support of the Verbraucherzentrale NRW (NRW consumer organisation), which takes account of both the interests of the users and also the differing framework conditions of the region’s providers of further training. A “Model terms and conditions of business” shall be published as a result of this. The NRW consumer organisation has indicated that the participating conditions of the individual institutions can be examined by means of a contract check and “consumer friendly contractual terms and conditions” certified. This result can then be used as good publicity by the inspected institution as a type of “Consumer quality seal”.

This leads to more transparency of the offer in the region and increases the trust of the users in the providers. This contributes towards a strengthening of the network idea both on the part of the participating network partners and also in the region itself.

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**R3L: ReLL – REGIONAL NETWORK TO DEVELOP LIFELONG LEARNING STRATEGIES****► WALTER KUGEMANN**

‘Quality’ as a term sounds positive and convincing, but linked to the complex education and training environment concepts and practice on quality are amongst the most blurred and controversial ones, if it comes to concrete measures, procedures, aims.

The regional perspectives even enrich complexity as well as opportunities and challenges to the quality scene. The contribution will structure the field from complementary perspectives:

- the strategic overall quality approach, represented by the elearning initiative quality programme strategic project SEEQUEL and
- the regional LLL policy analysis view as represented by the ReLL project.

Based on the SEEQUEL analysis and structural quality framework describing the stakeholders ‘views on quality’ by their roles, value systems and sectors of action and the quality areas by learning context, learning process and learning outcomes the concept of ‘quality’ as a differentiated bundle of richly contextualised and permanently moving targets is presented demonstrating the need for a permanent, open, flexible and structured ‘quality dialogue’ including all relevant actors and values.

This is projected onto the context specific for regions and their regional policies and dynamics towards lifelong learning and the process developing a learning region. Quality dialogue structures within a region are described using the SEEQUEL frame. Following the conceptual framework developed in ReLL, those dialogues, its participants, aims and specific difficulties are projected onto the sub-regional, local and individual level. Examples are given out of specific regional experiences, how those dialogues can be successfully initiated, maintained and productively used.

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## **Panel No. 04**

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How to develop new  
learning worlds and  
learning places

## Introduction

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The contribution of networks towards the creation of new learning worlds

The successful implementation of lifelong learning goes hand in hand with a fundamental transition in terms of the individual, professional and social understanding of teaching and learning.

In this context the classical forms of learning in the school,<sup>1</sup> in the areas of vocational training, university and further training do indeed continue to be relevant, however, a more strongly controlled form of informal learning in everyday life, at the workplace, within the family and in people's leisure time is becoming increasingly significant. In the wake of this a new cultural outlook is called for, which integrates learning within the whole period of our lives and facilitates the development of a new learning principle, in which autonomy and self control assume a special status.

Networking is the key word with the help of which such a learning principle should come into being by providing an innovative impulse that stimulates the development of new learning worlds and learning locations.

At a European level the improvement of learning strategies by the networking of regions above all in terms of the promotion of regional economic growth, social integration and the inclusion of citizens within society life has already been assigned particular significance within the framework of the Lisbon strategy since the year 2000.<sup>2</sup>

In this process the regional level in particular has proved to be appropriate for the development and organisation of a new learning culture, as the potential of realising a learning process throughout the life spans of the people only emerges by means of the networking of the relevant protagonists and institutions of a region.

Regional networks have been formed within the framework of the European initiative R3L (Regional networks for Life-Long Learning) and the Federal German support programme "Lernende Regionen – Förderung von Netzwerken" ("Learning regions – promotion of networks") in which new ways of learning should be developed and tried out by means of new forms of cooperation. "New learning worlds" arise, which develop to become a central theme area for the structuring of a contemporary learning culture with a viable future, whilst the interlocking of the education and training offers are organised at a regional level and education and training processes can be better coordinated between the protagonists with respect to the social, cultural and economic developments.

1 Council resolution of 25 November 2003 on "Making school an open learning environment to prevent and combat early school leaving and disaffection among young people and to encourage their social inclusion". OJ C 295 of 5 December 2003.

2 For information on the "Education & Training 2010" process, including the development of new learning environments, making learning attractive and opening up education and training systems to the wider world, see web site: [http://www.europa.eu.int/comm/education/policies/2010/et\\_2010\\_en.html](http://www.europa.eu.int/comm/education/policies/2010/et_2010_en.html)

*E-Learning as the key for innovative learning arrangements?*

New learning worlds require innovative learning forms and learning arrangements. In a transformed education and training landscape, which places lifelong learning to the fore of its structures and shapes, these will differ from the established forms of teaching and learning in a lot of respects: Whilst the real rooms such as classrooms, libraries etc. in the traditional learning worlds form a rigid organisational environment for communication relationships and processes, new learning worlds also have a virtual dimension and permit flexible education and training scenarios that are independent of time. For this reason organisational, economic, technical, content and pedagogical issues must be solved en route to individualised, self-controlled, modularised and tailor-made learning at different locations.

Innovations in the area of teaching and learning are currently driven forward above all by the potential of IKT and E-Learning. The new media forms have developed to become a fixed component part of the imparting of knowledge and competency within just a few years, particularly in the further education and advanced training sector, as they meet the new demands on the part of the learners for suitable methods and flexible worlds of learning by means of their diversity. However, these new learning options do not just arise with respect to mobility and flexibility, but also in economic terms, and not least as a methodical novelty en route to the new worlds of learning.

In this context regional education and training networks as cooperation models between the differing protagonists can possibly provide particularly suitable prerequisites in structural terms for the meaningful employment of E-Learning within the framework of lifelong learning. Above all in economic terms, but also with a view to the quality of learning, small and medium-sized education and training suppliers can possibly profit from the options that exist in networks in particular of linking E-Learning with innovative didactic concepts such as the Blended-Learning approaches in constantly new forms in a needs-based, tailor-made and learner-oriented manner.

*New learning worlds in self-tuition centres*

If learning should become a self-evident component part of an active life throughout all the phases of our lives then it may not only take place at the recognised and formally structured "education and training locations". In this way the workplace as a place of learning takes on a much greater significance – this extends from the office to workplaces at assembly lines in industrial enterprises, in which lifelong learning takes place. Even locations, which were earlier solely reserved for leisure time activities, are increasingly developing to become learning locations.

In addition very new places of learning have arisen, such as self-tuition centres, which enrich the varieties of learning world concepts as a fitness center for your brain. The options and requirements of the network protagonists are merged at one location, in the self-tuition centres, which came into being within the framework of regional cooperative arrangements. In this way regionally oriented self-tuition centres come into being, which can form a learning world with specific and tailor-made learning arrangements, which are in line with the requirements of the people learning in the region: Small and medium-sized enterprises thus have the option of training their employees in a tailor-made and up to date manner in accordance with their present requirements, whether it be with the help of the software offers of self-tuition centres or with in-house products, whereby only the learning infrastructure of the self-tuition centre is used. But also in the case the individual self-learner all the options are available in the self-tuition centre to learn in both an interest-based and also needs-oriented manner. However, this is above all successful if appropriate network structures that enable the successful working of a self-tuition centre within the region are formed by means of regional cooperative arrangements, as the type of structures, in which a self-tuition centre is embedded, are of great significance for the acceptance and the success of such a learning world.

#### *Education and training coaching at new learning locations*

New learning worlds transform the learning process and thus also the people involved in the learning processes. Within the framework of these changes a role transition and extension has emerged: The classic head-on situation of conventional learning – a lecturer instructs a group of students – is increasingly developing in the direction of a “self-determined” and “self-controlled” form of learning, in which the students can determine all the parameters of their competencies’ acquisition and should and, must also, do this in the future. However, this also means that high levels of “learning competency” on the part of the people learning are necessary in order to learn successfully in new learning worlds. However, such learning competence cannot be generally assumed for everyone. Target groups, whose participation in education and training should be increased, in particular are not au fait with the current concepts such as learning “in time” and “on demand” and subject to the risk of being overtaxed and alienated. In order to counteract this above all these people learning must be accompanied into the new learning worlds and guided. However, in this way new job specifications for the professional role of the tutors will also result in the future: The conveying of knowledge will then no longer be the primary focus of a tutor. Social and pedagogical components of guidance, planning and supporting people learning must soon assume a prominent place within the range of tutor competencies. Not least the job description “tutor” must make way for a correct description of their profession: Training coaches, who ideally will support people on their lifelong learning path, shall take the place of the former tutors, and will above all individually advise people at education and training biography intersections and help to find new education and training routes and transitions.

Education and training coaches will become a new tool in new learning worlds, which will however, be installed at a great costs both in organisational terms with respect to the content and also in financial terms. Structured are called for in this case so that this goal is successful, with the help of which education and training coaching can be implemented within an integrated learning world concept. Education and training coaching could be viewed as being a modular offer within the framework of regional cooperative arrangements, which can be implemented in accordance with people’s needs and flexibly but also take account of the economic regional background.

**Discussion point / key issues**

- How can an improvement be achieved in terms of cross-education and cross-training sector cooperation and with respect to efforts to ensure learning times, phases and locations are made more flexible, and made more constant so that new learning worlds arise?
- What will the learning worlds look like in detail and how can they be realised?
- Do regional education and training networks offer particularly favourable structural requirements for the development of new learning worlds?
- How can people who are subject to educational and training disadvantages be integrated within new learning worlds?
- Are new learning worlds plausible without E-Learning?
- Train the trainer and education and training coaching: Which new fields of work and professional roles arise within the framework of the new learning worlds and which parts do networks play in this context?
- Which concepts are present for the learning worlds of lifelong learning?
- What influence do regional cooperative arrangements have in detail upon the creation of new learning worlds?

How can people learn throughout their lives in regional education and training networks?

## Scenarios

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### Scenario I

Karl, 40, and Hannelore B., (38), live with their children, who all still attend school, in Lower Saxony and manage a medium-sized organic farm. The running of their farm is a tradition for them – they were both raised in farming families – as well as a conviction. As farmers they have specialized in dairy and livestock farming and also grow vegetables. The produce is sold in Mrs B.'s purpose-built farm shop where the children sometimes help out. Business with the organically grown produce is going well; however, after deducting all the costs there is not a lot left for the family to live on. Karl and Hannelore B. had been looking to achieve an additional income in areas other than farming for some time. In a mail-shot from the Ländliche Erwachsenenbildung (rural adult education organization), Karl B. read an article on renewable energies and found out about the profession of Energiewirt, energy manager. The B.s would like to find out more and, in particular, whether, where and how further training in this field is available that would be compatible with running the farm and with the family.

The Lower Saxony Learning Region has developed a further education concept "From Farmer to Energy Manager". As project partner of the network, the rural adult education authority conducts mobile information and advice events in various restaurants within the region, at times that make it possible for farmers to attend.

Karl B. attended one such event and obtained information on the ways both he and his wife can fit in training to be energy managers alongside the work on their farm. The Blended Learning concept developed by the Learning Region provides a solution: learning takes place at home on the farm, online by computer, with modular learning sequences at times that suit them. Teletutors accompany the learning process and are available to answer questions and offer performance checks. In this way only a few events need to be attended, which – as with the information event – are organised at times when the farmers can be present.

**Scenario II**

Ms M. is in her mid 30s, an administrative assistant and works part time. She has two children who still have to go to school. Importance is increasingly attached to customer friendliness within her company. Maria M has the task of regularly sending personalised mailings and serial letters to the clients. She has basic IT skills, which she taught herself, but was faced by her limitations in this task. The company provided its employees with the option of obtaining the necessary qualifications in the self study centre in Offenbach, a part of the learning region, as Ms M. was not the only person to indicate that they were in urgent need of additional qualifications. In this case the company was offered a concept of self managed and simultaneously coached further training with respects to the contents required with the aid of tuition software. The education and training services of the Offenbach self study centre for company range from the organisation to the use of in-house software and extend to support provided by industry experts. In addition the students are issued attendance certificates.

Mr B. is 49 years old and a trained office administrator. He has not worked for several years for health reasons. After fully recovering he planned to return to working life. To this end he had to come to terms with the innovations that have arisen in the past few years, and in particular with the new technologies in the field of office communications. In addition there is the fact that the regionally-based companies also work on an international scale and anticipate that their staff have some foreign language skills. However, Mr B merely has IT skills, which are only of a theoretical nature, and his English skills have deteriorated markedly since leaving school 20 years earlier. Mr B. urgently wishes to freshen up his languages and also wants to gain qualifications in the IT sector at the same time. He has found the right place to acquire these skills in the form of the self study centre in Offenbach. Here he has been provided with the opportunity of polishing up and enhancing his skills with the appropriate training software. In conjunction with his study coach he has planned and structured a form of training to obtain the desired qualifications that is tailor made to his requirements. Mr B. determines the study goals, the study speed, the study times and the "timetable" himself and wants to train in the area of writing applications in the self study centre once he has achieved his study goals. Based on the specific living and learning situation of the two persons the learning region of Offenbach devises a further training concept, which takes account of the specific requirements, the respective knowledge of the participants and their individual learning speeds.

## Abstracts

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### ► **CLAUDIO DONDI**

#### **Building new learning supportive worlds at individual, organizational and societal level: how can regional policy help?**

Building new environments in which learning can take place is not only and not mainly a question of new learning spaces: it has to do with learning awareness, learning priority, learning support, access to learning opportunities and recognition of learning achievements. The presentation will shortly explore three different levels of design and implementation of learning worlds: the micro-implementation level of individuals, their peers and family; the meso-implementation level of organizations, local and professional communities, the macro-level of regional economic and social context.

In particular the presentation will analyse what form support may take, what role ICT can play and what form of recognition is needed at the three levels, and how Regional Lifelong Learning Policy can help.

The concept of "Learning Region ePortfolio" developed within the REL Project will also be introduced as a tool to be used by "candidate" Learning Regions not only to document their progresses towards a Learning Region philosophy and practice, but to demonstrate to their citizens and organizations how learning progress can become a main identity element in society.

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### ► **JAN H.G. KLABBERS**

#### **Preconditions for the design of effective Interactive learning Environments (ILEs)**

In my presentation, I will pay attention to lifelong learning from the perspective of strategic human resource management (HRM) and the way it is linked to society and business practice. Usually, SMEs lack the resources, capabilities and motivation to professionally carry out strategic HRM, and to provide adequate education and training capacity for their employees, especially in the light of the ongoing economic, and technological change.

Therefore, I propose to establish regional public/private partnerships for lifelong learning with two major goals:

1. Strategic HRM facilities – enhancing networking, and pooling of old and young talent;
2. supporting competency development through the proper design and use of ILEs for continuous education and training.

In order to be effective, the design of such ILEs need to take on board four interrelated views on knowledge: explicit knowledge (encoded); tacit knowledge (embodied); outillage mental (encultured); local knowledge (embedded). I will elaborate on these views and present guidelines for designing ILEs that fit into the idea of lifelong learning.

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**LEARNING REGION: APPOLONIUS!**► **THOMAS SCHMIDT****Multimedia Learning in Largely Inhabited Areas – webwohner.de**

Largely inhabited areas are the cause of specific problems throughout Europe because of the fact that a large number of people live together, learn, and work in a small space. That these largely inhabited areas can 'suddenly' become support blocks for innovation in the field of Lifelong Learning is often overseen.

In the presentation shows experiences made and results in the learning region of Marzahn-Hellersdorf in this specific field. Additionally possibilities of bundling and increasing activities under the label "webwohner.de" in largely inhabited areas throughout Berlin are depicted. Possibilities of exchanging knowledge, through experience, with European partner regions are included.

"webwohner.de" represents a supportive programme for children, young people, parents and senior citizens, which facilitates experience with the new services in the field of cable networks, in apartments of largely inhabited areas, at different locations. Additionally the media competencies of young adults which already exist, will be used to generate new (e)learning processes in the region. The importance of networks covering all areas is presented in a clear manner.

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**LEARNING REGION: LERNENDE REGION OFFENBACH**► **DORIS LENZ****Self-study Centre Offenbach**

The self-study centre offers people from all walks of life, who are interested in learning, at PC work stations, via teaching software, the different possibilities of self-controlled learning, which can be used anytime and according to one's own individual requirements.

The diverse range of learning programmes for general, school and occupational further education are used by individuals and groups of people from schools, firms and further education institutions. The learners themselves decide on when to start, the subject matter and how quickly they want to learn. Of central importance is the educational coaching, provided by qualified training consultants, who accompany the person through the learning process and offer support by providing learning techniques. In this way the competences for organised Lifelong Learning, where the individual is solely responsible, are nurtured.

Through statistical research the development of user frequency and user structure of different target groups is shown. It becomes apparent here that the people who are attracted by this are primarily those who, for one reason or another, avoid conventional education, possibly because they are particularly fast or slow at learning, or because they are unable to take up courses which are set at certain times due to their private or occupational situation.

The attractiveness and innovative character of the teach yourself centre has meant that other education institutions have become interested in the exchange of information, based on experience, concerning teaching and learning concepts. Different 'learning regions' have already requested that the pilot project be transferred to them as an example of good practices. Through the nationwide networking with similar projects and the fact that the establishment of other self study centres is furthered, the teach yourself centre contributes, as a multiplier, to the innovative development of further education.

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**R3L: ENLACE GENOVA****► GIANCARLO SINTONI****Stakeholders - lifelong learning potentialities and policies**

Local Lifelong Learning needs are linked to the characteristics of local cultural activities and have to find a specific local response on a case-by-case basis.

There is a general need for acquiring or qualifying professional management, marketing and communication skills, fund raising capacities: this means that “culture needs also non-cultural education” and the development of cross-sector skills.

Importance of informal learning: traineeship is regarded as a perfect instrument “to transfer knowledge practically” in specific working environments, to connect “learning places and places to use learning practically” and to enable the transfer of knowledge and know-how.

Cultural enterprises are developing, which facilitates the creation of tailor-made courses for the needs of the cultural enterprise (particularly for standard activities).

A large percentage of cultural professionals are freelancers and most individuals develop cultural activities as volunteers. This entails a new approach to vocational training based on individual access to education and VT and a non structured context of learning.

The enlace research “bottom up / participatory” approach ensures an effective learner centred approach and allows individuals to build their “learning world”.

Supporting non-formal learning, for instance study circles, is a way to make people more responsible and self sufficient in choosing their own “learning path” and to play the double role of “teacher and learner”.

The creation of a “cultural platform” is useful to identify critical masses that could be the target of Lifelong Learning and active labour market policies and to provide standard Lifelong Learning opportunities, to focus attention on new emerging problems, to integrate disadvantaged people, to stimulate local cooperation, to exchange good practices.

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## **Panel No. 05**

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How to ensure SME´s  
commitment within  
regional partnerships

## Introduction

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In a modern society lifelong learning is a requirement extending through all the life phases of an individual. Hence working life is a particularly important starting point for processes of lifelong learning. However, learning offers in the context of working life must also always take account of the organisational conditions of the workplace.

When viewed from this point of view the employees of SMEs are a particularly important, but also demanding target group, in terms of offers to enable lifelong learning. SMEs have structural problems with respect to the development of personnel. Day to day business ties up the scant resources. Staff units, which can deal with this, are – if they exist at all – insufficiently well integrated within the operative business and act “from the sidelines”. Cooperation with major education and training providers is difficult due to the time and cost constraints. In addition the management personnel of SMEs are frequently not very sensitive, due to their training background, to the options and necessities of systematic personnel development. The non-transparent nature of the vocational training markets is particularly marked due to these kind of framework conditions.

In the light of this dilemma a need for education and training services emerges, which are tailor-made to the structural problems of SME's. The requirements that their services are tailor-made and compatible with the operating sequences are particularly high here.

SMEs have generally had bad experiences with education and training service providers, which are so to speak offered to them “off the peg” from suppliers without any knowledge of their business. What is more a lot of offers, particularly in the event of recourse to E-Learning elements that is frequently necessary, are difficult to finance for individual SME's.

Regional networks made up of education and training suppliers, chambers, parties sponsoring the economy and SMEs can provide new solutions in this area. Networking on the part of the SMEs can minimise the financing problem. Cooperation between SMEs and suppliers of education and training minimises the lack of transparency of the advanced vocational training market and leads to the improved coordination of supply and demand. Education and training service providers have access to a higher number of offers within a combine and, when the cooperation works, are able to develop tailor-made products for the SMEs.

Of course, this type of personnel development within a network means the protagonists involved are faced by new challenges in addition to the linked opportunities. Considerable ramifications in terms of the internal structure result for both sides – the supplier and the demander – from such networking efforts. The SMEs must be able to coordinate the structure and the advanced vocational training of the personnel. The suppliers of education and training quickly discover where their limits are in such an innovation network with “off the peg” products. Product development in cooperation with the client creates new demands in terms of flexibility and reliability.

**Discussion points / key issues**

- Forms of address: Against the backdrop of the frequently poor experiences of SMEs in the area of advanced vocational training intelligent forms of addressing SMEs are necessary. How can regionally anchored networks of education and training providers gain access to the decision makers in SMEs? To what extent can recourse be made to already existing network experiences in the region?
- Survey of demand and analysis: The surveying of the operating requirements and the analysis of operating sequences are important requirements in order to be able to make the companies tailor-made offers, which lead to the genuine interlocking of vocational training and working life. How can networks develop new effective instruments to survey needs in SMEs by means of a division of work between the suppliers and the generation of trust between the suppliers and demanders?
- Qualification of the consultants: As a result of the significance of the analysis of operating conditions new requirements in terms of the qualifications of the consultants, who in addition to a very good knowledge of the respective regional education and training offer, must also have the ability to analyse operating sequences and structures. How can networks ensure the consultants have the necessary qualifications?
- Development of tailor-made solutions: The development of tailor-made solutions within a network can on the one hand be achieved by means of close cooperation in a spirit of trust between the suppliers during the compilation of offers. On the other hand it will frequently be necessary to develop new in-house products. The requirements in terms of cooperation in a horizontal (supplier) and vertical (supplier-demander) dimension are particularly high in this area. How do networks arrive at effective forms of cooperation in this case?
- Consequences for the internal organisation of education and training suppliers: The necessity to develop tailor-made new products in cooperation with the client means the education and training suppliers are subject to increasing pressures to be flexible and precise during their development work. how do education and training suppliers react to this pressure to adapt, which results from the regional network work?

**Relevant documents**

- Implementation of "Education & Training 2010" work programme, working group "Making learning attractive and strengthening links to working life, research and society at large", progress report, November 2003:  
[http://www.europa.eu.int/comm/education/policies/2010/objectives\\_en.html#mlearning](http://www.europa.eu.int/comm/education/policies/2010/objectives_en.html#mlearning)

## Scenarios

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### Scenario I

Mr Schmidt, 56, managing director of the XXX printing company is faced by fundamental structural changes in his field. In the traditional printing business, orders have been drying up gradually. Through his various contacts in the field, Mr Schmidt has decided that his company can only secure its success through a fundamental change of strategy. This entails moving from purely a printing business to offering various media services for the administration of data for his customers. For Mr Schmidt, this means considerably extending and adapting his skills in pre-printing processes.

Alongside substantial investment in hardware and software, and re-organizing the company, this change in strategy also requires a new staff qualification profile. Mr Schmidt will be employing new staff, and he would like to provide the existing members of staff further qualifications. However, he is unsure which further training opportunities are available in his rural region.

In this case the SME consultancy office of the learning region provides him with assistance.

A consultancy team of the learning region looks for the company, determines the competencies of the staff and determines the company's further training requirements with Mr Schmidt based on the corporate objectives. The network can make Mr Schmidt a tailor-made offer "from one source" although a large number of training providers are involved in the measures. In this case the fact pays off for Mr Schmidt that the learning region as a fully functioning network has ensured that competitors cooperate with one another.

By means of the consultancy and the offers of the learning region Mr Schmidt has succeeded in mastering the change of strategy of his company with well trained employees. In this process it has been possible to structure the company structural transition without any redundancies as the qualification offer of the learning region has facilitated the tailor-made further qualification of all staff based on their requirements.

**Scenario II**

Hubert F manages a metal processing company in Thuringia. As a West German entrepreneur he took over a company with a long tradition 10 years and rescued it from bankruptcy. In this process he also had to make a number of staff redundant. In this process it was self-evident in his eyes that he would have to make "older" staff redundant, after all younger staff are not off sick as often, flexible and therefore open to the notions of the modernisation of production that was urgently required.

He went about the modernisation process in a bold manner, but it unfortunately emerged that the remaining young salaried employees were not much more productive than the older staff. It constantly emerged that they did not have the experience to deal with problem cases, the new machines were often not running due to defects. In addition Hubert F. had to recognise that the young staff tended to leave the company of their own devices to go to western Germany where they had better prospects. For this reason Hubert re-employed a number of his older employees. But now they did, of course, have to be trained so they could operate the modern machines. How could that work? The standard seminars were of a week's duration and were only offered in the capital of the Land (federal state). In addition the employees often demonstrated a candid unwillingness to take part in such training. They regarded the fact that they should have to embark on new training at their age as an unreasonable demand.

A report in the local newspaper made Hubert F aware of the local "learning region". Within the space of just two days two consultants from the network were already working in his office. They knew the problems of companies of this region and this sector. They were thus immediately able to propose a solution: The training would just take three half days of attendance events, the rest would take place using the PC and in a small company group. And due to the fact that the competitors on the spot also needed to qualify their employees, the events involving the attendance of staff also took place here on the spot. However, above all the qualification process should be especially oriented towards older colleagues. The trainers and tutors had attended advanced training courses themselves and adapted themselves in terms of their methods and teaching techniques to the learning habits and speeds of older people.

## Abstracts

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### ► JOSEF SCHEFF

#### **Knowledge Management as a Service: Collaboration between Small and Medium Sized Enterprises (SME) and Training-, Consulting- and Research Institutions**

Apart from a small group of very innovative companies with high technical expertise in a market niche, small and medium sized enterprises (SME) in general usually depend on the collaboration with external know-how experts (these include also "traditional know-how suppliers" like training-, consulting and research institutions, groups of trainers and universities) because of their limited personnel and know-how capacities.

In order to achieve an improved innovativeness and higher profitability of SME when collaborating with experts, the quality of the co-operation form - especially in economically difficult times- is considerably important. This question of assuring the product offer- and co-operation quality gains more and more on significance in the European Union, with an emphasis on questions of quality assurance in the training sector. However, the knowledge factor is a badly managed resource in business which is connected to the degree of complexity of this topic. Massive criticism is exerted on the reactive human resource development in the companies, on the inadequate offer of external know-how experts for SME and on the insufficient consideration of the distinct attitudes of SME towards collaborating with external know-how experts.

Based on this background a representative survey with SME (up to 250 employees) as well as with training-, consulting- and research institutions working in this area was conducted in the Graz area. Starting out from the demand and supply side analysis of know-how activities, the main co-operation deficits as well as indications for developing innovative approaches for co-operation were derived.

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### ► PAULA KYRÖ

Finland has altogether about 225 000 enterprises, out of which 99,8% are small and medium-sized employing over 60% of our labour force. One of our future problems is the massive retirement of the current small-business owners. In order to anticipate the need to expand the number of entrepreneurs as well as to help new generation to take over family businesses the national board of education has developed a new competence-based degrees for entrepreneurs. This new system of education is designed for the adult population as a flexible way to demonstrate their knowledge, skills and experience in authorised tests of competence. It contains three levels; vocational qualifications, further vocational qualifications and finally specialist vocational qualifications.

104 entrepreneurs past the tests for the further and 14 for the specialist vocational qualifications in 2002. This numbers are rapidly increasing.

Adult education centres have a crucial role in conducting this system. Competence-based qualifications consist of modules according to the sets of tasks and core functions of each profession. Adult education centres evaluate the qualifications and support the process by offering these learning modules. Thus students can take personal, tailor-made learning plans and get support in those qualifications they need in order to attain the required level of competencies. The tests take place in the companies and they concern such issues as business planning, marketing etc.

This innovative system has already turned out to be successful and might be suitable for other countries.

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**LEARNING REGION: LERNENDE REGION – LANDKREIS EMMENDINGEN****► ANDREAS FELLER****Training for, in and with Small and Medium-Sized Companies: The Personnel Development College (PE – College) of the rural district of Emmendingen learning region.**

The PE – College represents, through its company-specific way of doing things, its strong practical orientation, its tendency of effecting the whole of the company, in many ways an innovative, promising and, in the meantime, tested way of training for SMEs. After education network partners have carried out various acquisition measures, individual preliminary talks and interviews are carried out, in order to gather information, to identify the company-specific situation and to estimate the training needs. These talks guarantee, beforehand, that the college has high specifications, and also enables the running of the college to be integrated into the organisational conditions and everyday business of the company.

In five workshops, which are located near one another, which are flexible as regards timing, and which are carried out over a time period of five months, personnel appointees of the companies, together with trainers, work on subject matters and specialist themes of the companies taking part. These subject areas are then consequently discussed in four employee seminars and are accompanied in the companies by two to three direct processes which focus on these themes. The colleges are each made up of eight to twelve companies from different industries, whereby each company is allowed to let two employees take part in the seminars. The most important thing for the success of the method is not only the competence of the persons carrying it out, but also that the companies work closely together in the colleges, as well as the close cooperative partnership with the trainers and the education providers. Special themes can often only be made possible here via a network of the providers. Furthermore higher flexibility of the providers, concerning time and location, requires network agreements and synergy effects.

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**LEARNING REGION: LERNLANDSCHAFT WARTBURGREGION****► DIETER NEUBAUER****Personnel Development Strategies for SMEs**

Within the framework of the 'Development of the Need for Specialists' group project questions on the development of personnel need are examined and processed with SMEs. On the one hand the actual needs of the participating SMEs, are examined, with consideration of the personnel development instruments, in the sense of a usable toolbox. As models, different personnel development instruments are tested in pilot projects. At the same time the actual training and personnel needs (qualitative needs) are established, and the results and knowledge made available to other companies. In this way specialist and management personnel, in terms of strategic personnel development tasks, in SMEs, are strengthened. The basis for the new working cooperation between different educational providers is a 'regional cooperation platform' (qualifying system), which creates new education structures and education provider structures in the region for need oriented training. Within the framework of an analysis of the needs 'main skills', which are understood by the firm and the workers as key factors for competitive and innovative capability, are pinpointed. From this, new curricula are designed and negotiable offers for SMEs are put together.

In modular training programmes not only regional education providers try out co-operative arrangements to draft services, several companies also cooperate in projects, in choosing workers, providing business resources (trainers, training posts and jobs) with employment later on, or by using the manpower (time sharing, personnel pool). The project creates the prerequisites (Platform), so that SMEs can offer their services to each other.

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**R3L: EDUC.A.NETWORK****► ROSELLA BRINDANI****Transformations in Economic Systems and Lifelong Learning Process**

The three fundamental objectives of the Lifelong Learning process, local development, social inclusion and personal growth, have represented an excellent starting point for the partners in the EDUC.A network to consider the relationships between the evolutionary processes in industrial structures and the strategies applied to the learning processes during a lifetime.

Industrial districts, territorial productivity systems, and small and medium sized enterprises (SMEs) concentrated in small areas with homogeneous and integrated productions are today subjected to profound transformations and modifications.

Competition has therefore changed since the past: it has become wider, longer and more complicated. Productive systems have shifted from "know-how" to "know-knowledge".

This needs to be followed closely and to be supported, especially in SMEs, through an environment that is favourable to the industries with efficient external networking - otherwise we cannot identify local factors which are not directly related to the economy, but still fundamental for the industrial development.

Here we are in the presence of something that is almost a paradox of the process of globalization: the local roots of competition. The systems within the territory are competing, not only the single companies.

Not only do technologies, infrastructures and financial resources make the difference, but also social capital, as well as the territory's history and that of the community. Lifelong Learning is therefore an instrument for a system, for a territory, for nourishing and developing this social capital

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## **Panel No. 06**

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The central role  
of Monitoring for  
implementing  
Lifelong Learning

## Introduction

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Current and prompt monitoring or controlling has subsequently become a fixed component part of the development of projects and networks. Monitoring supports the management by means of the provision of real-time information and proposals for control. It informs the politicians and the programme participants as to which projects are being developed, what happens there, where supporting and critical success factors are to be found and how the goals are to be achieved. Monitoring controls the planning, reveals deviations between those things that have been achieved and those that have been planned, refers to weak points and endeavours to ensure that decisions are made to remove these weak points.

The implementation and the understanding of monitoring and controlling has been fundamentally transformed in the past decades: Whilst controlling was once based on unquestioned, absolute objectives, the systems are now increasingly oriented towards available and relevant goal formulations at a project level. The expectations of the “stakeholders” increasingly come into play. Controlling has become a process of moderation and organisational development.

Monitoring is only meaningful if goals are defined and clear to all the parties. In the case of innovation programmes, e.g. within the framework of the European Social Fund only top objectives are specified and potential ways forward proposed. The specification is carried out in the area of networks and projects. Linked with this is the notion of politicians that the optimum solution for the respective environment will be developed whilst using the knowledge available in a decentralised form by way of a bottom-up process. However, it is difficult, particular in combines – regardless of whether they are based on public support or private initiative, to swear the autonomous partners to fixed objectives. Objectives, which are not put into operation sufficiently, will, however, be used in part to pursue in-house interests.

Against this backdrop the need for monitoring systems, which provide valid and reliable information for the current project and network management for project participants and networks and information for the structuring of new strategies, has grown.

([http://www.europa.eu.int/comm/education/policies/2010/objectives\\_en.html#measuring](http://www.europa.eu.int/comm/education/policies/2010/objectives_en.html#measuring)).

**Discussion point / key issues**

- Monitoring as a management instrument, as a medium of reflection and of the self management of innovation processes.
  
- Interregional benchmarking for the improvement of the comparability and the competition of the regional networks between one another: Identification of the joint problem area, juxtaposition of the individual solution models, identification of the best solutions, cost-effect analysis.
  
- Development of decentralised performance indicator systems, which are directly related to the network or project objectives and regional starting position (e.g. balanced score cards).
  
- Standards and performance indicator pyramids, which provide information about the attainment of the respective bundle of goals at both the level of the projects and the networks and also at the level of the programmes (options of group controlling).
  
- Monitoring with respect to the quality assurance in the project work and thus as an important basis for the certification of procedure sequences and organisational forms
  
- International standards in monitoring

## Abstracts

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### ► JEAN GORDON

#### A. The 4 big questions for all projects receiving public funding

Was it worth doing? Examine and estimate whether or not the activities were worth carrying out as well as the outcomes for all partners and beneficiaries. How could we do it differently? It's about: results, implementation and organisational issues. Was the money well spent? Analyse the use made of public funds. Did it produce anything? Evaluate the contributions made to future developments and the impact on the systems in which the work was carried out. It's about: the products and the impact of the activities; Do we want to work together again and why? Examine the feasibility, desirability and conditions of continuity. How has the process of building a partnership contributed to the outcomes? It's about: processes, dissemination and sustainability

#### B. Some of the issues behind them ...

Why bother evaluating? Developing an evaluation strategy and choice of approaches: internal/external; self-evaluation. What's behind the jargon? (e.g. demonstrate added-value, the multiplier effect, contribute to the impact, disseminate results, benchmark, etc. ) The balance between quantitative and qualitative. Qualitative approaches and typical difficulties. Can we "measure" the impact, A classic approach – does it work? (Examining the choice of activities to reach the objectives of the project and assess results; contributions of a "transnational" approach to policy formulation and practice; difficulties encountered and solutions applied as part of a pilot process; "satisfaction" levels of all parties in creating effective partnerships; processes of working together; etc... ) What's the difference between monitoring, evaluation and auditing? What are we generally trying to do? Can evaluation contribute to sustainability?

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### ► MICHAEL OSBORNE

#### Monitoring

The raison d'être of the R3L Indicators project was that we needed to provide various stakeholders within the region with the tools to self-audit their own progress. This implies necessarily that procedures should be created for formative evaluation, and that benchmarks should be available to monitor and measure performance. Previous work of this type has been carried out with other projects (see Longworth 2000) and organisations with the EU and beyond have developed indicators by which the learning city or region might be judged (see for example OECD 2001).

A number of issues arise when considering this process. We might for example consider how we arrive at indicators. There are a number of quality indicators and benchmarks for lifelong learning (EC 2002a and b), and a number of these such as adult literacy levels relate to world-wide measures and take account of cultural specificity. However much of this work makes it clear that there is considerable difficulty in measuring some proposed indicators (e.g. participation in non-formal education<sup>1</sup> and a lack of consistent coverage across countries of Europe. In the work that we have carried out, we have been concerned to a certain extent with the quantitative indicators, largely related to measures of outcome, we are also interested in questions of processes and networking. In other words, a measure of success of the lifelong learning region might be the way in which stakeholders work together and the recognition that there are multiplicities of parties from formal, non-formal and informal sectors who have a stake in the process. Furthermore analysis must be matched by the potential of action based on access to precedents. There is little point in identifying deficiencies without providing possible solutions based on practice

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<sup>1</sup> Work from further afield in Canada is currently addressing this area and may be a good example for Europe (see the survey work of "The Changing Nature of Work and Lifelong Learning in the New Economy: National and Case Study Perspectives" project at <http://wall.oise.utoronto.ca/research/040129CRISurvey.pdf>)

**LERNENDE REGION: SAARLERNNETZ****► GUDRUN STAHN****Project controlling in the Saar learning network using a balanced scorecard**

The SaarLernNetz learning region has the vision of advancing to become the leading regional education and training market place for hybrid learning offers in the Saarland, which extend to the neighbouring countries, by 2006. Approximately 35 partners are currently working on this project under the coordination of the DFKI Saarbrücken.

The education and guidance offers that will be drafted in seven sub-projects should be merged together within the planned education and training market place in the future. Cross-sectional issues worked on within the network such as quality assurance, certification, education and training guidance and education and training marketing should help to ensure that the offer of the SaarLernNetz is successfully positioned in the regional market. The network is currently drafting a business plan to economically establish it.

The network has been externally evaluated since 2002 whilst using the balanced scorecard. The requirement to this end was the targeted development of methods and tools, as the basic balanced scorecard methods are aimed at individual companies. The selected procedure combines a definition and the underpinning of the goals at network and sub-project levels at the start of the projects with intermediate appraisals that accompany the implementation with respect to the process and the results of the network's work at intervals of 8 to 12 months respectively. The workshops include intermediate assessments to derive conclusions (e.g. target corrections or future working fields). In this way the network partners were methodically supported to consistently align their concepts, products and services with the market developments and towards jointly defined network objectives and quality criteria and are motivated to bring objectives that they pursue themselves into line with those of their partners. In the lecture the methodical procedure and experiences during the application of the balanced scorecard will be reported on.

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**LEARNING REGION: STEP ON! REGION STADT MAINZ/LANDKREIS MAINZ-BINGEN****► CORNELIA DAMRATH****Conference contribution: The evaluation of regional education and training networks – Objective, implementation and results based on the example of the Step on! network.**

The Step on! regional education and training network, the subproject of the 'Learning regions' programme concentrates its activities on the areas of education and training marketing, equality of opportunities and aging in the region. The following two objectives were primarily linked by means of the evaluation of the network, which refer to both quality of the processes and also of the results. Firstly the central activities of the network and the results of the network's work should be reflected upon and passed back to the participants as a result of an analysis of strengths and weaknesses. Secondly action recommendations and future prospects were derived from the findings with respect to the effectiveness as well as problems in relation to implemented actions and structures that have been gained in this process.

The evaluation results are based on group and individual discussions with network partners, whereby in the framework of their cooperation forms and processes, questions of interaction, integration and management as well as the balancing of the network's work up to now were dealt with as issues. In addition to the successful implementation of project ideas such as the generation of an education and training database, the initiation of special education and training guidance offers for women, or the implementation of a care for the elderly day as well as the high levels of commitment, which a lot of partners contribute to the Step on! network, the following essential questions with respect to the network's emerged amongst others:

- Are the objectives of the project at a sufficient level of abstraction and specification?
- Where are the advantages and limits of 'bottom-up' control?
- What importance is attached to quality assurance?

The lecture takes account of these and other questions with respect to the results of the evaluation and provides an insight into the form and function of the evaluation of the network.

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**R3L: UNIVERSITY OF STIRLING****► KATE SANKEY****The Indicators Project**

We developed instruments to deliver the indicators of lifelong learning, known as 'Stakeholder audits.' They should enable respondees to understand the many basic elements of lifelong learning as it affects their organisation. This new knowledge becomes converted into actions that will implement its concepts both internally within the organisation (i.e. to turn it into a learning organisation) and externally (i.e. to work with other organisations to help build a learning society, a learning city or a learning region within the geographical area where the organisation resides) in order to

- establish a 'dialogue' between the designer and the respondee
- pass over essential new knowledge and ideas to the respondee
- allow the opinions, experiences and ideas of the respondee to be freely expressed and meshed with the requirements for change within the organisation
- act as a driver for change
- act as a staff training stimulator
- provide ideas for the development of innovative internal policies and strategies
- energise stakeholders to contribute to learning region development

The results represent a major step forward in the implementation of policies and strategies for the local and regional dimension of lifelong learning in Europe. Not only do the administrators in regional offices have the tools to measure their own progress and performance in these areas, so also do the key institutions within their geographical areas. The potential is here for the development of an integrated approach to regional lifelong learning development, vital to Europe's continued growth for the future.

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**Panel No. 07**

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Developing partnerships

## Introduction

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### Regional Networks and Lifelong Learning

The notion of developing regional networks for lifelong learning implies the goal of building infrastructures that support the individual in its efforts of lifelong learning. Important elements of this support are counselling, marketing, and offers of learning that meet the individual's demands. Policy makers that want to support such regional networks therefore must concentrate on fostering self-sustaining structures instead of financing just "another project". The challenge of developing networks is thus to turn innovative networks into self-sustaining structures.

The contributions of networks to lifelong learning at the regional level are the following:

- Mediation between supply and demand
- Integration of education and training into broader processes of regional development
- Products and services for the individual
- Products and services for the participating organisations.

### *Network Dynamics*

Networks that develop innovative solutions for lifelong learning face several challenges. These challenges can be put in terms of dichotomies that have to be handled in an intelligent way. These dichotomies are:

- Bottom-up vs. Top-down Governance
- Efficiency of processes vs. flexibility and innovativeness
- Openness for themes and actors vs. closure in order to reach goals
- Centrality vs. de-centrality.

The development of innovations within networks also has consequences for the internal structures of the participating organisations.

### *Sustainable Networks*

The preconditions for networks that provide regions with sustainable infrastructures for lifelong learning seem to be the following:

1. The inclusion of local authorities is indispensable. They can provide political and financial support and can build organisational bridges to existing elements of infrastructures in the regions (public-private partnerships).
2. Regional enterprises, especially SMEs must be included in the network.
3. Concrete interests of the protagonists must be tackled. This means that the protagonists have to cooperate actively on concrete, goal-oriented projects.
4. The work of the network must be oriented towards the development of products and services that meet the demands of the region in terms of its deficits and areas of potential.

Based upon these organisational preconditions, networks must develop business models that combine public funding and market gains. Models of financing and intelligent organisational solutions at the network level are important preconditions for self-sustaining network structures.

**Discussion point / key issues**

- Organisational Development: The development of network structures implies the co-development of internal structures of the participating organisations.
  
- Horizontal and vertical networking: Networks for supporting lifelong learning must realise horizontal co-operation (e.g. co-operative product development of competing suppliers of education and training in order to make innovative offers for SMEs) and vertical co-operation (co-ordination of offer and demand).
  
- Regional Networks must be able to meet regional demands and thus become part of policies of regional development.
  
- In order to arrive at self-sustaining structures, networks must develop intelligent business models and organisational structures that permit the implementation of enduring infrastructures of lifelong learning.

**Relevant documents**

- 2003 analysis of the implementation of lifelong learning strategies:  
[http://www.europa.eu.int/comm/education/policies/2010/lll\\_en.html](http://www.europa.eu.int/comm/education/policies/2010/lll_en.html)
  
- Getting to work on lifelong learning: Policy, practice & partnership. Summary conference report, CEDEFOP 2004: <http://www.trainingvillage.gr/etv/default.asp>
  
- Implementation of "Education & Training 2010" work programme, working group "Making the best use of resources",  
[http://www.europa.eu.int/comm/education/policies/2010/objectives\\_en.html#making](http://www.europa.eu.int/comm/education/policies/2010/objectives_en.html#making)

## Abstracts

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► **BARRY NYHAN**

### **Building partnerships in 'learning regions'**

In addressing the question - why is it that some regions or localities are able to develop and change 'while others lay stagnant - the phenomenon of the 'learning region' has been put forward. This implies that certain regions are able to innovate because they have the capacity for *collective learning* about how to develop a practical '*know-how*' type of knowledge. A 'learning region' is characterised by the cooperation of all of the different actors - educational bodies, research and development agencies, statutory bodies, enterprises and non-governmental organisations ('civil society') - in '*learning together*' about how to devise solutions and produce new knowledge to address local needs. This 'entails a commitment to partnerships through which knowledge and expertise is harnessed from disparate sources for the achievement of a common goal. A learning region gives legitimacy to 'different forms of expertise - practical and theoretical, lay and academic - meaning that economic and social systems can only be sustained if they are jointly constructed by all of the actors. It sees knowledge as being derived from different sources and in particular favours researchers and practitioners working together in an 'action-research' manner in development coalitions

The paper briefly outlines seven pointers for educational and training agencies in taking a successful leadership role in 'learning region' partnerships.

1. Assist the partners to find agreement about a common visionary goal that will motivate them to work together to attain something worthwhile.
2. Keep the momentum of the development process going without trying to rush matters
3. Leaders must play 'catalyst', 'honest-broker' and 'mediator' roles.
4. Partnerships are sustained by exciting concepts (theories) about human, social, economic and development.
5. But, the focus must be on achieving sustainable pragmatic results.
6. Arenas and methodologies to facilitate dialogue, joint deliberation and conflict resolution are essential.
7. Regional partnerships must be embedded in their own unique cultural settings.

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**► PETER HEYDEBRECK****Regional foresight – a tool to promote mutual learning processes**

The competitiveness of regions is substantially determined by the quality of their innovation systems. Effective and efficient innovation systems are characterised by a number of criteria such as (1) need orientation, (2) transparency of the system towards its members and external organisations, (3) sustainability, (4) critical mass of competences and resources, and (5) holistic system approach with long term partnerships.

Regional foresight is a powerful tool that can ensure that individuals and organisations in a region

1. become *motivated to learn* about the potentials of a region as well as the needs and competences of regional players, thus ensuring transparency and need orientation of the system;
2. get involved in mutually benefiting relationships, networks and *learning platforms*, thus achieving sustainability;
3. and *implement the lessons learned* by acting and investing in co-ordination with other system members, by focussing on strengths achieving critical mass and high integral quality of the innovation system.

Heydebreck's presentation outlines current initiatives to support regional foresight processes, highlights key success determinants of such processes and briefly illustrates learning processes by drawing upon the foresight model region of Mecklenburg-Vorpommern.

*Peter Heydebreck, University of Lindköping, Sweden, p.heydebreck@inno-group.com*

**LEARNING REGION: LERNENDEREGION MAIN-KINZIG+SPESSART****► ELKE HOHMANN****Business model of the main-kinzig+spessart learning region network**

A business management model for the office of the learning region main-kinzig+spessart by means of the application for the second project phase, which aims to generate revenue and as a result opens up financial sustainability prospects for the network. The business model was developed “bottom-up” by the network’s advisory council.

Under the objective of the “promotion of lifelong learning” products and services of the office within four business fields are described in the business model, which are offered both to the partners and also to the non-network partners. In this process the office views itself as being a service provider for the partners and clearly refrains from offering education and training offers for “final customers” and thus entering into competition with its own partners. For this reason the revenue from courses will be retained by the partners – unless they serve the promotion of co-financing in this period.

Instead the office helps the network partners to develop their own core competencies, in the area of cross-institution cooperation and assumes cross-sectional tasks to promote lifelong learning. The selected structure makes it possible to develop additional innovative projects, products and services even independently of public funding. The revenue from the products and services offered in the business model will be given to the office and finance the network management. The coming two project years will be used to implement this transformed, more business management oriented business structure to create a financial self-supporting organisation when the funding expires, which carries out education and training development in the region in the long term.

The business model will be presented within the panel.

*Elke Hohmann, LernendeRegion main-kinzig+spessart, e.hohmann@pbmks.de*

**R3L: REGIONET INTEGRA**▶ **JOSÉ MARÍA ESPINÓS RODRIGO**

**What do stakeholders in the context of immigrants, teachers, natives, etc. think on the matter of this panel?**

- Our project faces different realities in different European learning regions:
  - different expressions of the immigration phenomena
  - different public policies and approaches
  - different public structures and network competence a at local level
  - different “Third Sector” implication
  
- Identification of common needs in addressing immigrant family integration through Lifelong Learning pathways. Emphasis has to be put on adapting educational curricula to specific immigrant socialization needs on a local basis.
  
- The role of local authorities in designing and implementing Lifelong Learning strategies is relevant to integrate the following needs:
  - financial support to third sectors’ infrastructures since these are more flexible in attending individual training needs
  - stimulate immigrant-to-immigrant cooperation and associations in order to build networks which can structure learning pathways and capitalize integration opportunities
  - the need to design specific immigrant integration plans
  - define roles and attributes of a new professional figure: The Cultural Mediator
  
- Assessment of the benefits at a local cultural level as results of immigrant integration. The need to mainstream their cultural input in terms of the overall citizen Lifelong Learning reality.

*José María Espinós Rodrigo, Regionet-Integra, Quart de Poblet, Spanien, educa1@quartdepoblet.org*



**Panel No. 08**

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Financing Lifelong  
Learning

## Introduction

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Going hand in hand with the changes in the education and training system the parties fundamentally agree that in addition to the state the individual, the business enterprise sector, the social partners and other non-state organisations bear responsibility for education and training and learning. The financing of lifelong learning does not just extend to immediate services and costs for the individual but also includes education infrastructure and social-state precautions. Hence models of development and the financing of an adequate network supply structure of education and training for lifelong learning as well corresponding guidance, support and coaching institutions form part of the good practice of financing lifelong learning. Successful lifelong learning is also not least dependent upon the ability of the individuals to themselves take responsibility for lifelong learning as their own personal project.

Regions and local authorities play a large part to a lesser or greater extent in all member states during the provision of education offers and the infrastructure for lifelong learning. Innovative offers and financing forms, which partners from other social sectors of the region contributed towards for the first time, arose in this process partly as a result of the scant public capital resources. In this process important impulses have also been provided in Germany by means of the programme "Learning regions – promotion of networks" in which the participants must contribute a constantly increasing amount of their own funding and must develop their long-term future prospects. This leads amongst other things to a situation whereby models for regional education and training developments arise, which recognise business fields in close cooperation with the local authorities in the fields of education and school policy, local authority business enterprise promotion, promotion of the local employment market and in the area of social policy. In this process the networks must hold their own by means of the range of their offer and prevail over their competitive rivals. A network of private and public protagonists frequently turns out to be more flexible, has better contact with the worlds of the differing target groups and can win over new target groups to the cause of lifelong learning. However, strong partners from the business enterprise sector and the fields of politics are indispensable.

In the "Financing of Lifelong Learning" working circle the following aspects will be considered in more detail:

I.

By way of an introduction it will primarily concern the consideration of the regional framework conditions. The markets for lifelong learning are not free markets. The mobility of the factors is limited, the costs and benefits are not equally distributed, information asymmetries and other factors prevail. Set against this backdrop it is important to discuss which collective goods can be provided at a regional level in order to guarantee the optimum provision of the population with the good that is education and training.

### Discussion points / key issues:

- Incentives for individuals and collective protagonists to invest in lifelong learning at a regional level
- Creation of framework conditions for the development of (regional) education and training markets
- Translation of the conclusions of the BMBF (Federal Ministry of Education and Research)/OECD Conference "Policies to strengthen incentives and mechanisms for co-financing lifelong-learning" to the level of the regions
- Discussions of the conclusions relevant to the issue of the independent commission of experts "Financing Lifelong Learning" that was put into place by the Federal German government.

## II.

The second theme area of the working circle will adopt a micro-economic, business enterprise point of view. The focus will be upon learning regions and similar regional partnerships in which permanent cooperation throughout the differing education and training sectors is being striven for. The national framework conditions such as tax law and local authority constitutions, will be pushed into the background in the discussion. The focus is upon corporate ideas, offers for lifelong learning as well as organisational forms and public private partnerships.

**Discussion points / key issues:**

- Sustained financing of regional networks and local authority education and training infrastructures
- Public Private Partnerships for Lifelong Learning
- Development and promotion of innovative business ideas in education and training markets
- Regional Marketing for Lifelong Learning

**Relevant Documents**

- Implementation of "Education & Training 2010" work programme, working group "Making the best use of resources",  
[http://www.europa.eu.int/comm/education/policies/2010/objectives\\_en.html#making](http://www.europa.eu.int/comm/education/policies/2010/objectives_en.html#making)
- Communication from the Commission - Investing efficiently in education and training: an imperative for Europe, Com 779, 2002:  
[http://www.europa.eu.int/comm/education/doc/official/keydoc/keydoc\\_en.html](http://www.europa.eu.int/comm/education/doc/official/keydoc/keydoc_en.html)
- Der Weg die Zukunft, Schlußbericht der von der Bundesregierung eingesetzten unabhängigen Expertenkommission "Finanzierung Lebenslangen Lernens":  
[http://www.bmbf.de/pub/schlussbericht\\_kommission\\_III.pdf](http://www.bmbf.de/pub/schlussbericht_kommission_III.pdf) (German only)
- Lebenslanges Lernen in Deutschland – Finanzierung und Innovation: Kompetenzentwicklung, Bildungsnetze, Unterstützungsstrukturen. Bericht des BMBF für die OECD zu "Good Practice der Finanzierung Lebenslangen Lernens" im Rahmen des Projektes "Co-financing lifelong learning": in German: [http://www.bmbf.de/pub/lebenslanges\\_lernen\\_oecd\\_2003.pdf](http://www.bmbf.de/pub/lebenslanges_lernen_oecd_2003.pdf); in English: [http://www.bmbf.de/pub/lifelong\\_learning\\_oecd\\_2003.pdf](http://www.bmbf.de/pub/lifelong_learning_oecd_2003.pdf)
- Conclusions of the OECD/BMBF conference "Policies to strengthen incentives and mechanisms for co-financing lifelong learning", Bonn, 2003: <http://www.financinglifelonglearning.de>

## Abstracts

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### ► GERHARD BOSCH

#### **“Financing Lifelong Learning: the way forward into the future”. The most important conclusions of the “Financing Lifelong Learning” expert commission**

The necessity of increased investments in lifelong learning results from the three objectives of: (1) Increasing economic growth and improving competitiveness, (2) Promotion of the employability of individuals and (3) strengthening social cohesion.

The German education and training system is not equipped to overcome the new challenges:

- People over the age of 30 who do not finish their training or education hardly have a second chance.
- The advancement vocational training from the dual system is good, however there is a lack of permeability to enable people to access university education
- The initial vocational training has been modernised but corresponding modules for the further training are absent.
- Participation in general and vocational further training is selective. Attempts to integrate people with low qualification levels, marginal employees and persons with high family commitments are not sufficiently successful.

In future more resources for lifelong learning must be made available than has been the case up to now and indeed by both the state and also by the enterprises and individuals. The OECD has demonstrated that the best results are achieved by means of co-financing. The provision of money alone is not by any means sufficient to increase people’s willingness to embark on training and education. An improvement of the transparency of the offers and individual education and training guidance are necessary. In addition recognisable “walkways” through the education and training system must be created by means of the development of further training modules and successful course completions in conjunction with the reorganisation of the professions and further education and training course completions that are recognised throughout Germany. It should be made possible to combine resources from different sources with one another. In this way someone who is unemployed, for example, should have the option of suspending their claim for unemployment benefits in order to subsequently complete their school education with the funding of the Adult Training Promotion law, which would then open up the option of entry into the professional qualification courses of the Bundesagentur für Arbeit (Federal Employment Institute). Such combination options should be tried out and promoted. The instruments proposed by the commission will only be effective if they are embedded within an environment that is conducive to education and training. To this end people must be encouraged to embark on lifelong learning and the performances of the personnel in education institutions must also be recognised.

*Gerhard Bosch, Institut Arbeit und Technik, Gelsenkirchen, Germany, gbosch@cityweb.de*

### ► KAY CHEESMAN

#### **Developing regional policies for co-financing lifelong learning**

If policies to encourage the financing of lifelong learning are to be developed and implemented successfully at a regional level, they need to be underpinned by frameworks that support coherence and co-operation.

Drawing on the recent experience of a number of European countries, the presentation will outline key framework conditions that need to be addressed if co-financing policies are to be implemented successfully and the role that stake holders and social partners can play in this. The presentation will also make reference to the conclusions of the BMBF/OECD Conference ‘Policies to strengthen incentives and mechanisms for co-financing lifelong learning’, which highlight the many and diverse parties and networks interested in the area of financing lifelong learning and the challenge this presents in developing a common understanding of the issues and the need for further research and empirical data.

*Kay Cheesman, Regional Skills Development, United Kingdom, kay.cheesman@lsc.gov.uk*

**LEARNING REGION: LERNENDE REGION TÖLZER LAND****► ANDREAS KÄTER****Public Private Partnerships in the Tölzer Land**

More than 70 cooperative partners work on joint projects to improve the education and training structure in the region, including education and training agencies, universities, public administration, social institutions and companies and associations work in the Tölzer Land.

**Cross-sectional tasks**

- Market-oriented education and training database  
Task: Information about, and more rapid access to, education and training offers
- Learning guidance with ProfilPASS  
Task: Documentation of the learning biography whilst taking particular account of informal learning, development of education and training prospects, support during the implementation. Target: self-managed lifelong learning
- Quality development  
Task: Transfer of business enterprise tools for project planning and success controlling to education and training networks; benefit analysis based on balanced scorecard
- Education and training research  
Development of an offer based on education milieus (Rudolf Tippelt) with Product Clinic
- Education and training marketing  
Based on the fixed learning concept "Lernende Region LIFE\*" (2004: more than 30,000 visitors) and cooperation with the Professors Maier (Marketing) and Tippelt (teaching) target group specific tools for providers of education and training are drafted. The LRTL is the model region amongst the learning regions due to this approach: 270 participants at two national conferences in Benediktbeuern.

**Subprojects**

- Young people fit for the future (provider: Jugendbildungsstätte Königsdorf)
  - Akademie FiF (FiF academy for women and men in the family phase: Preventive ten month course offer for the time of parentage with the objective of making it easier for parents to master the double burden of family and profession after re-entering working life
  - s.t.e.p. young persons project (SchülerInnen testen ihre Stärken, engagieren sich in der Region, planen ihre berufliche Zukunft) (Pupils test their strengths, become actively involved in the region, plan their professional future); Project weeks and follow-up activities for 15 to 18 year olds preparing them for professions in cooperation with companies; for individual participants and entire classes; tutor training for middle schools; enhancing the status of youth leaders in the sports clubs and afternoon support in schools
- New start from the age of 50 (LRTL gGmbH)
  - Training and courses, promotion of the ability to learn of people who have entered retirement and want to get fit for a new task in life;
  - Training measures and internal company "Dialogue of the generations" to enhance the ability of people over 50 to gain employment;
  - Course packages for holiday guests (tourism, education and training, health)
- Mental health (Provider: Gemeinnützige Trainings- und Therapie GmbH)
  - Development of a guidance and care network for people at risk of mental health problems (e.g. children who behave conspicuously, people in danger of developing addictive habits, based on the LRTL competency database for the Gemeindepsychiatrischer Verbund (Communal Psychiatric Combine) and connected multipliers (doctors, people responsible for personnel issues, teachers)
  - Volunteers' exchange for acquisition, guidance, schooling and finding of work for people, who want to work as volunteers

*Andreas Käter, Lernende Region Tölzer Land, akaeter@t-online.de*

**LEARNING REGION: LERNENDE REGION UNNA****► PETER PANKAU****Education and training marketing and funding – elements of regional education and training management**

A model of “regional education and training management” was drafted for the network in Unna. The direct link between marketing, funding, development of innovations and the sustained safeguarding of the organisation, development of innovations and dynamic structures has become clear in the past three years. Up to now education and training marketing was viewed as being “better PR work”, the task of “funding” as the attraction and distribution of public funding (state subsidies). These tasks are redefined in the Unna model of “Regional education and training management” and linked as equal ranking business fields with the business fields of “Education and training innovation” and “education and training organisation”.

The products and services developed in the “education and training innovation” business field cannot all be marketed commercially. In this case there are also intangible goods such as ideas as to how to market the lifelong learning principles. In the Unna model of a “Regional education and training management” reference is therefore made in the “education and training funding” business field to a national, state task and therefore the demand for public funding (subsidies) is also not waived. However, it is important to access new target groups and markets, and to inspect existing products and services in terms of whether they can be freely economically utilised. The participation of all people, social groups and organisations in the region in the funding of life-long learning, supporting structures or in the investment commodity of “education and training” as a whole become clear as the objectives in the case of essential elements of the “education and training funding” business field. The development and implementation of new funding models is accommodated in this area.

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**Panel No. 09**

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Internationalisation  
of Lifelong Learning

## Introduction

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As in the field of university and research policy Europe is on course to create a European area for lifelong learning. European cooperation in the area of education and training policy has also been greatly intensified in particular due to the ambitious goals of the Lisbon strategy that Europe should become the most dynamic knowledge-based economic area in the world by 2010. Agreements of the government leaders and the ministers of education and training of Europe with respect to joint education and training policy objectives and the European comparison of progress during the development of national education and training systems are increasingly gaining in importance in addition to cooperation within the framework of EU-education and training programmes such as Leonardo and Sokarates. The promotion of lifelong learning is also a main objective of the European employment strategy, within the framework of which the European Social Fund is the most important instrument - one of its five policy areas is devoted to the "Promotion and Improvement of education and training, qualification and guidance as a part of the policy of lifelong learning". Lifelong learning, in particular in terms of cross-border cooperation, is also an object of the Community Initiative Interreg of the European Fund for Regional Development (EFRD).

The purpose of European cooperation is not the harmonisation of education and training systems, but competition between them, to ensure innovative solutions to joint education and training problems. The European dimension of education and training and the creation of a European education and training area, which makes it possible for all citizens in Europe to have unhindered cross-border mobility in terms of further education and advanced vocational training as well as the most comprehensive crediting and acknowledgement of their qualifications possible. However, the focus is not exclusively upon the retention and improvement of the individual's ability to gain employment; Lifelong Learning also concerns the securing of the individual's participation in the European society. The opportunities of open borders and worldwide communication options can only be used by the citizens if they have learnt to actively deal with the new opportunities. An understanding of international connections and dependencies and the ability to engage in cross-border cooperation and exchange as a new key competency are required, paired with tolerance and openness for other cultures.

It is undisputed that the trans-national mobility of the citizens benefits Europe as a whole. Intercultural experiences are more important than ever in the light of an employment market, which requires more flexibility and adaptability than ever before. It also promotes the regions of Europe, in which neighbouring border areas come closer together. The border areas, which have often been economically disadvantaged, in particular, require specialists with trans-national qualifications in order to hold their own in terms of the locational competition. However, cross-border cooperation in the area of education and training entails a lot more than just overcoming linguistic boundaries. If it should be effective in terms of employment and education and training policy, then it must not only be acknowledged in the participating countries, it must also be oriented towards European strategies. The European Commission is striving to achieve ambitious objectives in the area of general and vocational education and training. In this way at least 150,000 Leonardo traineeships shall be awarded each year until 2013. However, only approximately 1% of the German apprentices presently undergo training for a temporary period abroad. This is an indication that incentives to ensure mobility in the area of vocational education and training must be improved – the same applies to the school sector and to general further training.

Trans-national training combines, cross-border partnerships between education and training providers, the business enterprise sector and both sides of industry as well as euregional education and training guidance appear to be promising approaches. Additional incentives are provided by means of the recognition of competencies – wherever and however they are obtained. In this case the frameworks range from certification (e.g. the new Europass) to acknowledged additional qualifications and extends to a (plausible) dual degree certificate.

At a European level cooperation mechanisms between the partial programmes and education and training sectors must also be provided in the sense of a cross-education and training sector understanding of lifelong learning so that differing target groups come together in projects or networks. Regional, cross-border partnerships, as exist in the learning regions make an important contribution towards this end. They enhance knowledge of the structures and contents of lifelong learning in the partner land, create a sense of trust in their reciprocal competencies and thus lay the foundations for a mutual spirit of trust. Regional partnerships can fill the European education and training area with life “from below”. The national education and training systems can be enriched by means of the small number of border crossings, which goes far beyond the influence of the mobility projects in existence up to now. However, this demands a much more intensive exchange of information and the results obtained up to now from the network work.

#### **Discussion point / key issues**

- Contents and forms of cross-border education and training cooperative arrangements. How can regional networks stimulate exchanges at differing levels beyond the national boundaries? How can joint strategies be developed as a response to comparable economic challenges on both sides of the border? How can cooperation with SMEs be improved?
- Cross-border education and training consultancy. Mobility on a large and small-scale often fails due to a sense of insecurity and a lack of information. How can the lack of transparency of the offers in the area of lifelong learning be improved in the transnational context? Which forms and opportunities are available to make the acknowledgement of competencies and learning offers the object of the guidance? What part can networks take?
- Modularised further education. Learning modules, which can be completed abroad and whereby there is no doubt they will be acknowledged in the person’s own country, are attractive for people learning in a lot of respects and make rapid and needs-based further training possible. Which international and Europe-wide trends can be observed? How can regional networks create models, which point the way to the future?
- Certification of education and training measures. The acknowledgement of competencies is laborious and problematic. The reasons for this are, amongst other things, the lack of trust towards other education and training systems and the fact that employment markets cut themselves off, and can only be approached with certain forms of documentary proof. How can improvements in the area of vocational mobility be achieved by means of regional partnerships?

#### **Relevant Documents**

- Implementation of “Education & Training 2010” work programme, working group “Mobility and European Co-operation”:  
[http://www.europa.eu.int/comm/education/policies/2010/objectives\\_en.html#mobility](http://www.europa.eu.int/comm/education/policies/2010/objectives_en.html#mobility)
- Workprogramm of the European Union :  
[http://www.europa.eu.int/comm/education/policies/2010/doc/10\\_year\\_de.pdf](http://www.europa.eu.int/comm/education/policies/2010/doc/10_year_de.pdf)
- Berufsbildungsbericht 2004, Kap. 6, Europäische und internationale Zusammenarbeit:  
[http://www.bmbf.de/pub/bbb\\_2004.pdf](http://www.bmbf.de/pub/bbb_2004.pdf) (German only)

## Scenarios

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### Senario I

As he does every morning, Siegfried Maschke is going through his daily paper, but today, whilst looking in the job section, he comes across an article that seems to be written specifically for him. Siegfried Maschke is 39 years old and lives in Guben, Brandenburg, close to the Polish border. A year ago, Mr M. lost his job as commercial clerk in a medium-sized transport company. Since then he has been looking for a new job. Because of the difficult situation in the labour market in Brandenburg he also applied for different positions in neighbouring Poland. Due to his professional experience he fundamentally believes that he can find work. However Mr Maschke also knows that his application does not have any prospects of success not just because of his lack of Polish skills but also due to his complete lack of knowledge of the Polish economic and legal systems.

Mr Maschke heard about the German-Polish Education Centre. The cooperation of further training providers and companies in the region on both sides of the border can cover his training requirements – and what is more – a detailed independent form of consultancy helps him to find the right language courses and a tailor-made intercultural study option to this end.

In addition the network serves as a contact exchange for companies on both sides of the border. Here German and Polish companies can be found which want to work across their borders, search for employees with suitable qualifications and also cooperate during the drafting of the study options. In this way Mr Maschke can be sure that he can soon apply the things that has learnt.

**Scenario II**

“If I only knew how to get this order, or who to cooperate with in Poland in order to work on this job.” Like every morning, Peter Lenz is scanning the tenders for various jobs in Brandenburg. Not for the first time the national daily paper carries details of commissions from neighbouring Poland. Peter Lenz is managing director of the software design company NetSpeed, which for three years has been trying to establish itself on the Cottbus market. At the moment, the market in Brandenburg is fairly depressed, but 20 km further away, many new IT solutions are being sought: the Eastern expansion of the EU is enabling Poland to make a real technological leap.

Mr Lenz lacks the capital resources to open a branch in Poland. In addition, the language problems should not be underestimated during the design of user software. However, in terms of the technical execution he would definitely be able to match his international rivals. For his small company, the greatest hurdle lies in a lack of knowledge of the economic and legal systems in Poland. He is unfamiliar with the fundamental procedures, and Mr Lenz is not the only one to doubt whether any cooperation with a Polish firm is possible here at all as a lot of his friends talk about the differences of the “national characters” that are supposedly too great.

Mr Lenz gained a first impression of how he could endeavour to make the first step during the regular entrepreneur’s meeting of the local learning region. Here he does not just meet other German entrepreneurs from the most diverse sectors, who are in the same situation as he is, but also Polish colleagues who discuss matters from their point of view.

On the very first evening he developed the first idea with respect to a small project with a Polish entrepreneur. Even if nothing came of it in the end. Mr Lenz notices via his personal contacts what he is really lacking to establish a business in Poland. He thus books a Polish course with a provider who also has business contacts with Poland. Using the vocabulary and grammar he has learnt Mr Lenz learns how to hold successful business meetings with Polish partners. He must learn which leaving qualifications and certificates are important in Poland in order to be able to appoint Polish employees. And he ultimately begins to plan the joint training of the staff, who must also be further qualified for work in the neighbouring country, within the network of the learning region in conjunction with companies that are actually his competitors.

## Abstracts

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► **HANS GEORG ROSENSTEIN**

**Socrates and Leonardo da Vinci: Lifelong Learning and the European action programmes in the field of education and training.**

The promotion of Lifelong Learning is one of the main goals of the two action programmes of the European Commission in the field of education and training. The Leonardo da Vinci programme enhances the quality and access to vocational training across European countries. It provides financial support for the development of innovative transnational training projects.

The aim of the Socrates-programme is to improve – general – education by encouraging cooperation between the 31 participating countries in different actions from school and university to adult education.

These two programmes offer different opportunities for European citizens to become involved in European efforts to make Lifelong Learning a reality for all.

The speech will present different types of European cooperation in the field of vocational training and general education and will focus specially on the funding possibilities in the Grundtvig action of the Socrates programme.

*Hans Georg Rosenstein, Nationale Agentur Bildung für Europa beim Bundesinstitut für Berufsbildung, Bonn, rosenstein@bibb.de*

► **HARALABOS FRAGOULIS**

**Internationalisation of Lifelong Learning in Europe**

There is a consensus that a well-educated, skilled and adaptable workforce is a key parameter for the achievement of the Lisbon objectives. Strategies to foster lifelong learning and mobility (occupational and geographical, for educational and professional purposes) have therefore an essential contribution to make to employment, growth, competitiveness, while at the same time such strategies are necessary for promoting a genuine and open European labour market, active citizenship, social inclusion, reduction of inequalities and personal development.

The five European benchmarks on education and training have been a major step in the implementation of the open method of coordination in the field of education and training which is based on the shared understanding that improvement of national policies and systems can be more effective if inspired by common objectives and informed through a more systematic and structured mutual form of learning.

These benchmarks illustrate the joint commitment of the member states to make the education and training systems more responsive to the needs of the labour market as well as to the need to enhance the employability and adaptability of individuals (notably through the targets of raising educational attainment levels, reducing drop-out rates from education, improving access to key competencies, fostering participation in further education and training).

The “Education and Training 2010” programme underpinned by the concept of lifelong learning is another major vehicle of the new, enhanced approach of European cooperation in the related area. The particular component of this European cooperation regarding the field of vocational education and training (VET) has yielded some first concrete results which have the potential to make a significant contribution to the European efforts to improve skill levels, increase mutual trust between national systems and remove barriers to mobility.

Particular reference needs to be made here to the:

- proposal of a single European framework for transparency of qualifications and competences (new “Europass”) which rationalises and streamlines existing tools; this framework is expected to be operational in 2005;
- agreement on a set of common European principles for identification and validation of non-formal and informal learning;
- the development of a common quality assurance framework as a tool to facilitate and support member states in improving their national systems and approaches to quality assurance;
- on going work for the development of a European credit transfer system in VET

In parallel, in the area of regulated professions, the Council has recently reached an important political agreement on a Commission’s proposal for a reform of the system for recognition of professional qualifications. The main aim of the reform is to create a single, consistent legal framework making the process of recognition simpler, easier and clearer.

In the light of the above developments, there is awareness that in the future the priority should be attached to the implementation of the results achieved so far (such as the common European references and principles) at national level.

At the same time, further efforts at a European level should concentrate on:

- Supporting the implementation at national level;
- Establishing a Europe of education and training with a particular focus on the following elements:  
Developing a European Qualifications Framework based on national frameworks  
Completion of the development work and implementation of European credit transfer system in VET  
Increasing mobility for teaching and learning purposes  
Consolidating the European dimension of education and training

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#### ► SØREN KRISTENSEN

##### **Learning by leaving**

Stays abroad – both as study periods at institutions and as industrial work placements – are increasingly used as a didactic tool in an educational context. The European Commission recently proposed an increase in mobility in the new generation of programmes in education and training of as much as 400%, and to this must be added national and regional initiatives and programmes. But the fact that 1000, 10,000 or 100,000 people go abroad can never be a goal in itself – the important thing must be what they bring home with them in terms of learning. But what exactly is the “added value” from these projects; i.e. what kind of learning is it that we can derive from transnational mobility that we cannot get from the national context? And can we set up quality criteria for these stays abroad to ensure that the learning potential is fully exploited – are we, in other words, getting full value for the money we are investing in these activities? These are questions that must lie at the heart of any discussion of recognition of placements and study periods abroad.

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**LEARNING REGION: INTERNATIONALES BEGEGNUNGSZENTRUM ST. MARIENTHAL (IBZ)**► **REGINA GELLRICH****Getting there: The cross-border Learning Region Nysa**

The cross-border education and training network PONTES ([www.pontes-pontes.de](http://www.pontes-pontes.de)) that is sponsored within the framework of the “Learning regions – providing support for networks” (“Lernende Regionen – Förderung von Netzwerken“) of the Bundesministerium für Bildung und Forschung (BMBF) (Federal Ministry of Education and Research) is committed towards the sustained development of a future-oriented education and training landscape in the Euro region of Neiße-Nisa-Nysa and in this process views its border situation with the EU countries of Poland and the Czech Republic as being a very special development opportunity.

The establishment of the border region as a specific learning location with special opportunities and potential for innovative means of promoting lifelong learning and the intensification of cross-border cooperation in education and training sectors extending to the development of cross-border structures form the working priorities during the development of cross-border learning region. The cross-border model projects developed and tested by 100 German, Polish and Czech network partners extend from the euro-regional education consultancy for SMEs, the development of regional specific education and training concepts for teaching and learning materials for the learning of neighbouring languages, measures of cross-border professional orientation extending to the setting up of a trinational “Energy learning path”. In this way PONTES makes an important contribution towards the development of skills on the part people resident in the Neiße-Nisa-Nysa Euroregion and also to ensure that they identify with the border region more closely.

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**LEARNING REGION: LERNENDE REGION SCHLESWIG/SØNDERJYLLAND**► **CLAUS SAX HINRICHS****Promotion of the mobility of European citizens as the basis of LLL by means of cross-border network products**

The basic requirement for Lifelong Learning is motivating people to learn. The requirements for lifelong learning in the European context are therefore positive intercultural learning experiences. The rapid transition of the education and training and employment systems and the politicians demand intercultural mobility, openness and tolerance of the EU citizens.

The earlier people experience for themselves the meaningfulness and their own advantages due to these developments, the greater their willingness will be to accept the forthcoming challenges.

The learning region of Schleswig/Sønderjylland (Germany – Denmark) as a binational region therefore focuses on the bilingual “Children worlds“ field of action in particular based on different facets in addition to the tried and tested fields of actions (learning guidance, interlinking of school, university and business enterprise). This is particularly due to the fact that the basic foundation stones of lifelong learning are laid at an early age.

German-Danish school projects with respect to language-media and intercultural competency as well as cross-border further education for pedagogical professional fields amongst other things are implemented by means of cross-borders partnerships and projects.

The focus of the presentation is upon the representation of the children’s worlds field of action. In this case special attention will be paid to the successful development of the first bi-national and bilingual children’s museum in Flensburg as an innovative place of learning.

In addition to the description of the results up to now the partners will be shown the advantages as well as the opportunities and difficulties.

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**R3L: SILLNET – STRATEGIES IN LIFELONG LEARNING NETWORK****► CHRISTINE FITTON****The SILL\_NET project: Internationalisation**

The principal aim of the SILL\_NET network is to create an action research partnership which will develop strategic models to promote regional Lifelong Learning in those areas and across Europe.

It draws together a range of partners from 7 countries and 9 learning city regions – Arhus, Avilés, Dublin, Edinburgh, Göteborg, Padua, Munich, Rome and Stockholm. Partners have been identified by the contrasting challenges they face and the network comprises a variety of learning organisations ranging from not for profit learning partnerships, companies to municipalities. These are all at different stages in their development and implementation of Lifelong Learning Strategies.

Although the partners are working together on a project with common objectives the diversity of the partnership has been one of its major strengths. Partners have shared the different political and strategic contexts in which they work.

Such richness of diversity has enabled partners to use models and approaches developed by their partners which they might not otherwise have considered; to look at their own practices through their partners' eyes; to understand, even if they do not embrace them, different cultural perspectives and work practices; to develop their cooperation skills in seeking common outcomes; and to be open about difficulties and failures knowing that the partnership will help in finding solutions.

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**R3L: ALLLE – ACTING LOCALLY FOR LIFELONG LEARNING****► RENATO MASTROSANTI**

ALLLE project interpreted the effort to create an European area for lifelong learning developing itself as a transnational network of networks promoting innovation in life-long learning and building up new networks in learning city-regions. In practical terms, ALLLE's results are as follows:

- a) To widen the boundaries of established partnerships, to enable other city-regions to join and to share know-how. In addition to the five city partners in ALLLE (Athens, Helsinki, Newcastle, Malmö and Rome), five other cities are now playing inside ALLLE's network: Stockholm, Copenhagen, Glasgow, Lewisham and Greenwich.
- b) To catalyse and maintain local life-long learning networking processes in each of the five city-regions and to pilot transnational laboratories exchanging experiences and know-how among the stakeholders on precise items (e.g. expertise transfer from Newcastle library life-long learning to Roman and Malmö's libraries on adult e-learning courses).
- c) To open the network to not-for-profit and private stakeholders, as the five founders are all Municipalities.

ALLLE is not merely a network of five Municipalities, it is a network of 24 variegated partners co-operating within the framework of EU education, training and employment strategy with following results:

- a) Creation of a Web Observatory database with 32 good practice case studies from 11 cities and lessons and achievements learned during the transfer processes.
- b) a network of virtual events including e-forums around life-long learning policy debates and the transferability of good practices.
- c) bi-lateral networking between our main partners and stakeholders.
- d) laboratories in which partners and stakeholders transfer good practices know-how.

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