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WORKING PAPER N° 19



SMEs Promoting Lifelong Learning

Theoretical, methodological and statistical background for SP 4

Tallinn 2008



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This Working Paper is published in the Working Paper Series of an international research project “Towards a Lifelong Learning Society in Europe: the Contribution of the Education System” (acronym LLL2010) to reflect state of the art results of the research still in progress.

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Theoretical, methodological and statistical background for SP 4

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January 2008

1. Introduction - General outline and reflection

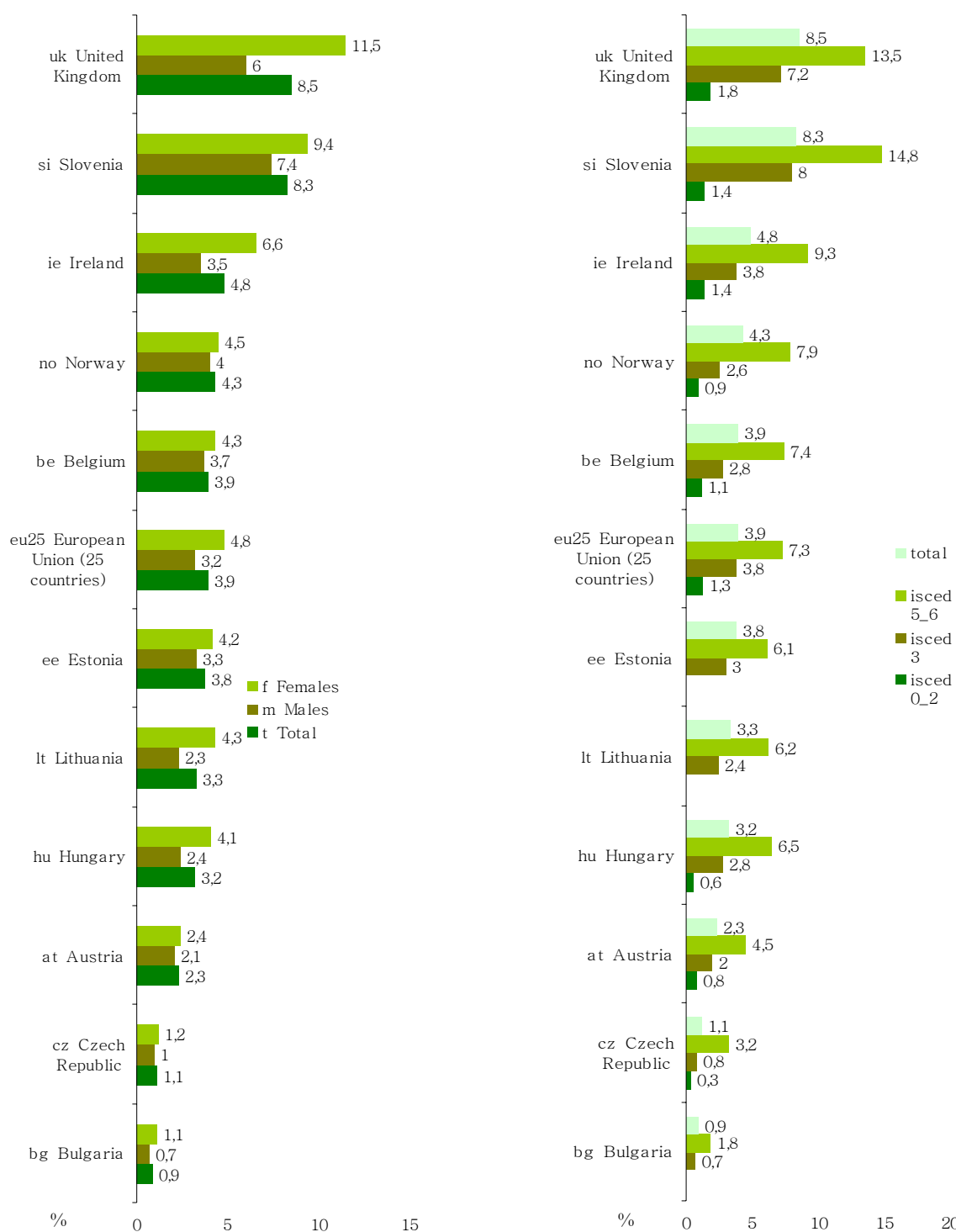
In the following paper, we sketch the challenge of integrating concepts for workplaces learning, training and formal education, introduce shortly into available statistics on training in enterprises in Europe, and discuss our considerations for the methodology of SP 4.

SP 4 aims to add a new dimension to the LLL2010 project: The support for employees participating in formal adult education provided by their employing organizations. We are interested in the motivations of enterprises to support formal learning of their employees, the patterns providing support and the obstacles hindering support of formal adult education. We are further interested in the embeddedness of the support for formal adult education in enterprises' training policies and the rationale for enterprises to support learning and competence development of their employees.

In SP 4, we face two main challenges. Firstly, we are interested in a comparatively rare social phenomenon – this is true at least in most partner countries. Diagram 1 shows the participation in formal education of employees in the partner countries (according to available data). In only three countries, employee participation in formal adult education reaches five percent of the workforce. What makes our research goal even more challenging is that a significant number of the participants are in their initial education (especially students) and/or their actual occupation¹ has nothing in common with their field of study. Therefore, we have to be aware of the efforts necessary to identify formal education participants with a stable position in an organization that is at least informed about their employees' educational activities or explicitly support their participation in formal adult education.

¹ Within the labour force concept, the group of employed also includes employees with only marginal economic activity.

Diagram 1 Participation of employed (25 years and older) in formal adult education by gender and ISCED-Levels (LFS 2003 – Ad-hoc Module on LLL) – in per cent



Source: Eurostat – Dissemination data basis

Secondly, we are interested in the particular position of formal education within the enterprises. Therefore, we have to manage jointly the two steps.

Workplace Learning and training in small and medium enterprises (SMEs):

On the one side is the interest in understanding workplace learning in SMEs in its main dimensions and the importance (or perhaps non-importance) of instruments to support workplace learning, especially training and further education offered or supported by the enterprises. Here, we are interested in both how enterprises organize learning and human resource development (HRD) and how enterprises benefit from their employees' learning efforts and the particular learning organisation. Workplace learning and training in SMEs are well-established research topics in Europe (Kitching and Blackburn, 2002) (Pukkinen et al., 2001) (Stewart and Beaver, 2004). However, results are quite heterogeneous and mainly influenced by the chosen approach: while the average SME use of training is low in most of European countries (European and European Network for SME Research., 2003), studies on workplace learning that do not focus on training courses find high learning activities in SMEs (Fuller et al., 2003).

Formal Adult Education in SMEs: For the different tasks, the need for preparation will be quite different. As far as we see, this question has never been addressed through comparative case studies. Therefore, for many countries, SP 4 will be the first time that the relation between companies and formal further education will be addressed. This also means that, for this particular question, we cannot rely on existing sources. Moreover, in many countries, cases of formal education of adults in and with at least some support of the enterprises are rare events. Given the range of offers of formal adult education and variety of enterprises and approaches towards learning in enterprises, we have to expect quite heterogeneous results, which we will later analyse and classify according to their specific logic. Therefore, considering the limited number of observations in each country, a comparison of countries will not be possible within SP 4.

For the fields of work, the quality of necessary preparation is quite different: For the goal of addressing workplace learning and training in SMEs, the theoretical and empirical background can be sketched before field work actually starts and improved during the further work. The preparation will help to understand how learning, support for learning and how the use of learning outcomes are actually organized in SMEs. The case studies will contribute to the research on SME and training in general, but we cannot expect the number of case studies to answer all the questions already addressed by other surveys and projects (Mandl and Dorr, 2004) (Dawe and Nguyen, 2007). By developing a more detailed understanding of workplace learning and training in small organisations, we build the framework to explore and understand the more specific research questions concerning participation in formal adult education and the organisation-employee patterns.

The following considerations are based on the experiences in previous research projects by the authors; see (Markowitsch et al., 2002), (Hefler, 2006), (Hefler, 2006, Hefler and Markowitsch, 2007), (Markowitsch and Hefler, forthcoming).

2. Integration of concepts in research on workplace learning

Research on workplace learning, human resource development, training in enterprises, learning organisations, organisational psychology and general theory of learning do not share a common language and a shared understanding of concepts. Especially the relation of concepts to each other is often unclear (e.g. the relation of ‘workplace learning’ and ‘enterprise training’). Moreover, in local research communities in Europe important terms have different meanings (e.g. ‘qualification’ in the U.K. = *Formale Bildung* (formal education) in the German speaking countries; ‘skills’ in the U.K. = *Qualifikationen*, in the German speaking countries, ‘formal training/courses’ in the U.K. = *non-formale Weiterbildung* in the German speaking countries.). Very often, different research communities use certain expression for similar propositions although they refer to completely different topics (e.g. ‘Workplace Learning’ for ‘Training in Enterprises’).

Currently, there is no alternative but to express carefully what we actually mean by the concepts we use and to carefully sketch the relations between concepts we want to use them. In the following, we would like to address concepts useful for analysing workplace learning on three different levels:

- (1) Relations to defined bodies of knowledge/skills/competences (formal, non-formal ...);
- (2) Relation between the learning individual and his/her workplace;
- (3) Learning of organisations as human systems.

Overview 1 outlines frequently used ways to classify learning activities in general. The dimensions used are the degree of possibility to make learning content explicit, the degree of intentionality and the relation between the described learning and a defined body of learning, established by a countries’ formal educational system. In workplace learning, consequently, we may find again any of these forms of learning. The concepts are regularly used, even if their relations to each other is not defined.

Overview 1 Usual classification of learning in general

Explicit	Intentionality	Degree of relation to a predefined body of learning (Initial Vocational Education, General Education)	
		Formal(=Qualification)	
	Intended		Courses
Explicit		Non-formal	Other planned forms of transfer
Tacit/implicit	Non-Intended	Informal Accidental	

We come to an overview on concepts on workplace learning. We would define workplace learning as any learning taking place in the workplace ('while working'). The individual learning in the workplace depends on the features of the workplace (its design), the support offered for workplace learning by the organisation and the support for workplace learning coming from the other parts of life of the employee: Here, learning outside the workplace is used in the context of the workplace and thereby transformed in a meaningful way. Overview 2 sketches the different levels proposed to describe workplace learning. It is important, in particular, that learning activities such as 'training' and 'formal education outside the working place' are only seen as a part of workplace learning; workplace learning itself is proposed as a rather broad concept. Within workplace learning, we will find any other learning as described in Overview 1 (e.g. a part is implicit or non-intended or informal and so on). Within the support mechanisms of human resources development (HRD), we find both approaches to redesigning the workplace and thereby the workplace learning and to support the learning of the 'job holder' by different instruments. Training is only one instrument among others.

Overview 2 Concepts for workplace learning

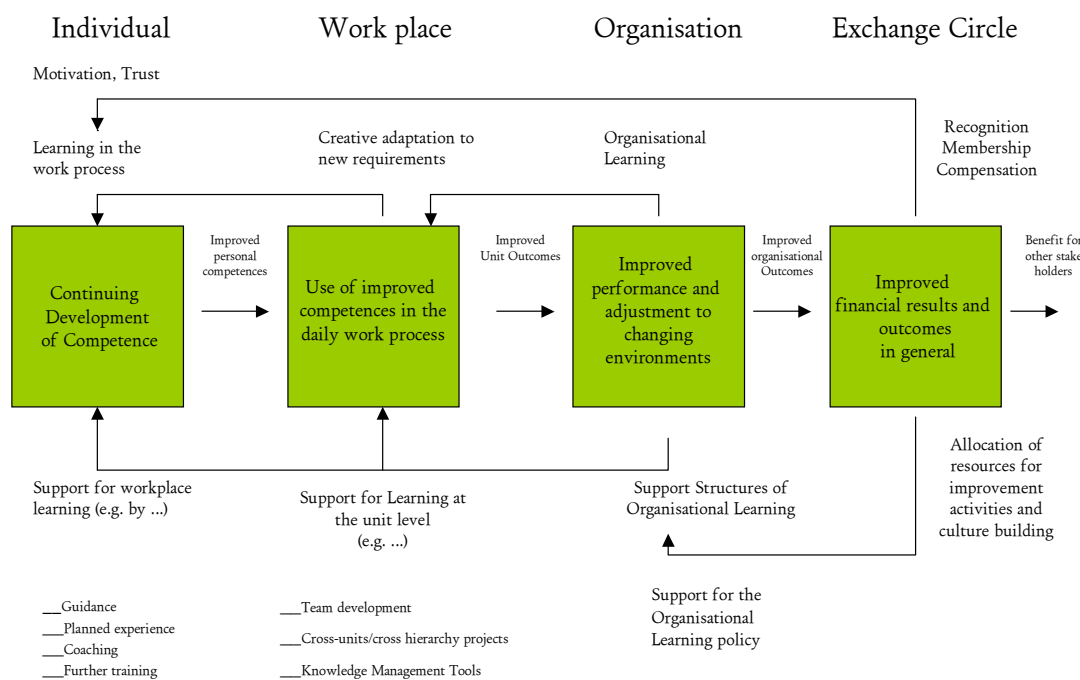
By participation in the workplace/Learning conduciveness of the workplace	Features created by the job design (Definition of tasks)	
	Autonomously developed features of learning–conduciveness of work place design	
By support measures (= HRD-instruments)	Structured feedback	e.g. Appraisal Interviews
	Structured exchange	e.g. Regular Meeting, Quality Circles
	Structured participation in communities/activities external to the workplace	e.g. Job rotation, job exchange, participation in project work for learning reasons
	Training (non-formal, formal)	e.g. internal training courses, external training courses; external Master's program
Import from non-workplace related fields	Participation in learning activities (of all kind)	e.g. participation in formal education ('second chance program'), in courses; reading non-fiction
	Family, Housework	e.g. raising children, supporting elderly family members; maintenance work in the house/flat
	Societal engagement, citizenship	e.g. being active in a political organisation, a church organisation
	Spare time, individual development	e.g. participation in cultural activities, attending psychotherapy etc.

Even less established is any terminology for approaching the learning of organisations. In our understanding, workplace learning is inseparably connected to the learning of the organisation. One cannot be understood without the other.

In a previous project, we have sketched a proposal on how to integrate workplace learning and organisational learning. (see Diagram 2) Here, we are interested in the view of HRD, which is only one among alternative approaches to the connection between workplace learning and organisation.

Diagram 2

Mapping interdependencies between individual competence development and organisational success



Source: Markowitsch/Hefler (2008 – Forthcoming) – See also for further explanations

A remaining challenge for the conceptual foundations of learning in the workplace is the dynamic nature not only of individual careers, but also of workplaces and organisations. Therefore, when describing learning, we need to describe the very moment of the trajectories of an individual, a workplace or an organisation. Currently, we have no common language for expressing our dynamic view of workplace learning. However, it is important to hold in mind the substantial dynamic nature of learning (see Overview 3 for some examples).

Overview 3 Dynamic aspects of Learning . Examples

Individual	Workplace	Organisation
	Changes (Examples)	
First entry after finishing IVT	Adoption new technologies	New ownership
Becoming a permanent member of the organisation	Applying new ways of work organisation	New fields of activity/closing down
Change of work routines	Reducing/Enlarging supervision	Fields of activity
Gaining more responsibilities on existing workplace	Part-time/full-time adult education	New division of labour between units
Changing workplace with/without promotion-same employer	Reducing/Enlarging levels of hierarchies	outsourcing/insourcing of activities
Changing employer (in/voluntary; with/without unemployment spell)	Implementing/Modifying team work	New balance in the importance of field of activities (product life circle, emerging and dying ‘cash cows’)
Changing field of work	Changing requirements triggered by the expansion of the offer of skilled job seekers	Changing market position, challenges by competitors Changes in demand of the market

3. What do we know about training in enterprises in Europe?

Knowledge on training in enterprises – understood as an elementary part of workplace learning – comes mainly from three different sources. Firstly, from case studies conducted in different fields of research ('qualitative paradigm'), secondly from surveys done by research groups or institutions, thirdly by surveys conducted by the Statistical Offices and co-ordinated by Eurostat (Continuing Vocational Training Survey, I (1993), II (1999), III (2005)). While quantitative surveys done by the research communities are restricted mostly to small samples (often not more than 200 enterprises, see the overview on surveys in (Bäumer, 1999)), CVTS achieved a much more representative sample of enterprises (e.g. in 1999, 2000–4000 in most of the participating countries).

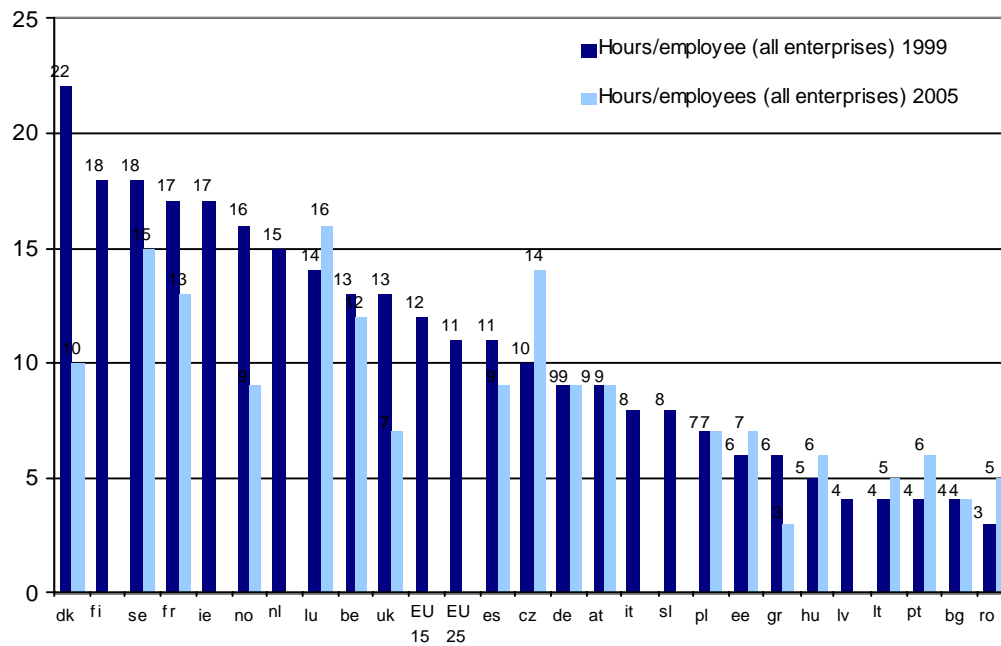
In the following, we present selected results of CVTS II (1999) and preliminary results of CVTS III. An extensive overview on the main results for CVTS II was provided by the European Commission (2003) *Continuing training in enterprises in Europe – Results of the second Continuing Vocational Training Survey in enterprises*. (available online). All data are accessible at the Eurostat Homepage (free of charge)². Between 1999 and 2005, major changes in methodology have occurred, so comparability between the two surveys is not clear at the moment.

For CVTS II, data are available for 20 NACE-classes and 6 size classes. For CVTS III, larger groups of NACE-classes (e.g. all manufacturing) are available and only three size classes.

²

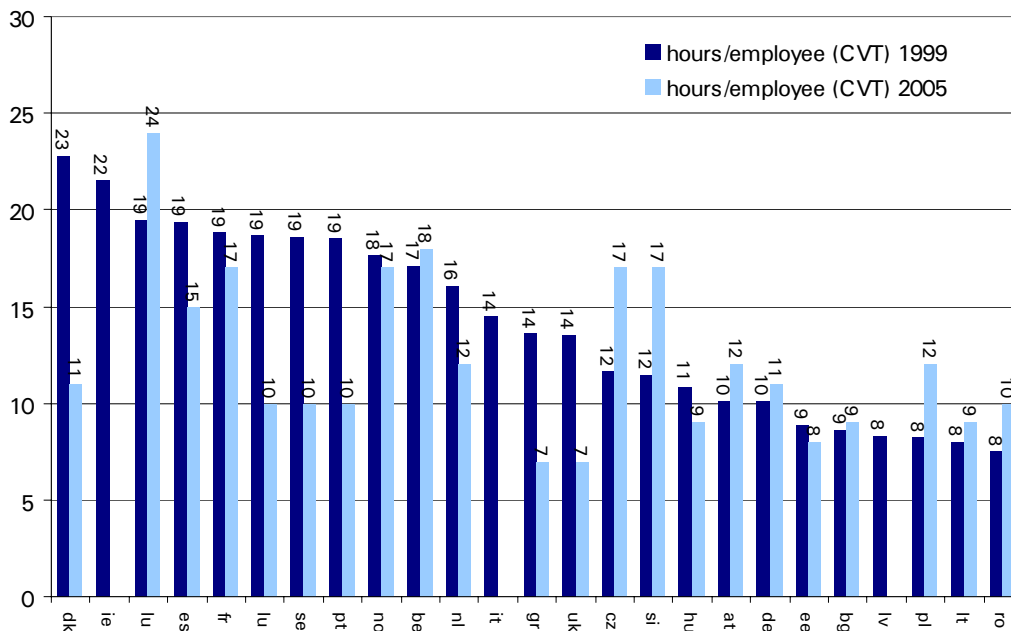
http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,45323734&_dad=portal&_schema=PORTAL&screen=welcomeref&open=/edtr/trng/trng_cvts3&language=en&product=EU_MASTER_education_training&root=EU_MASTER_education_training&scrollto=0

Diagram 3 Hours in training per employee – all enterprises (CVTS 1999 and CVTS 2005)



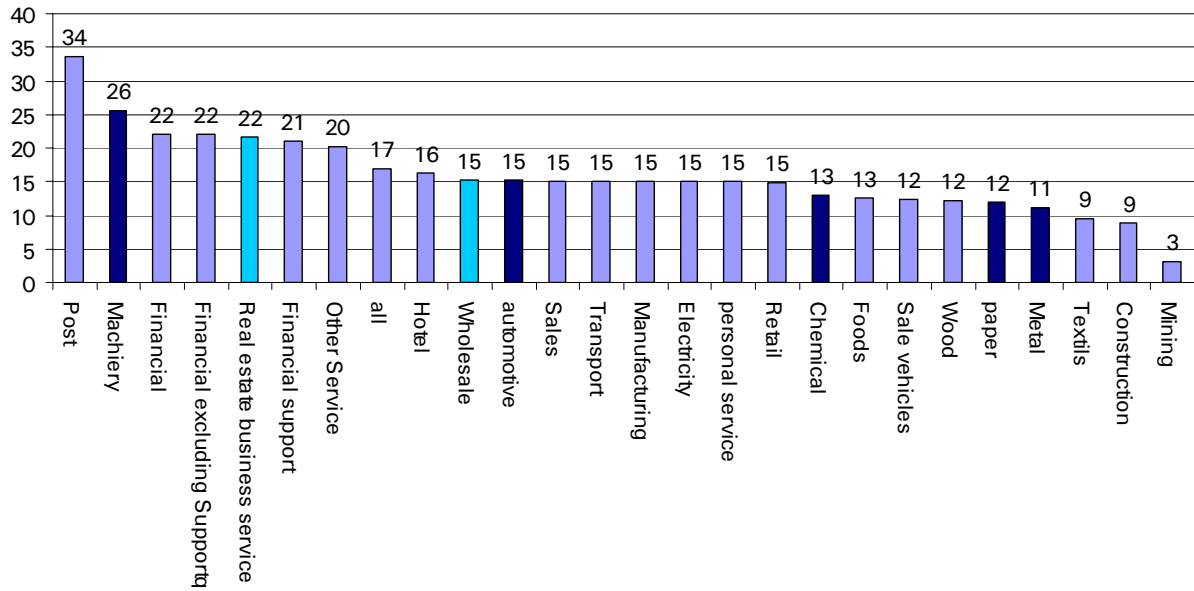
Source: Eurostat

Diagram 4 Hours in training per employee – enterprises with CVTS only (CVTS 1999 and CVTS 2005)



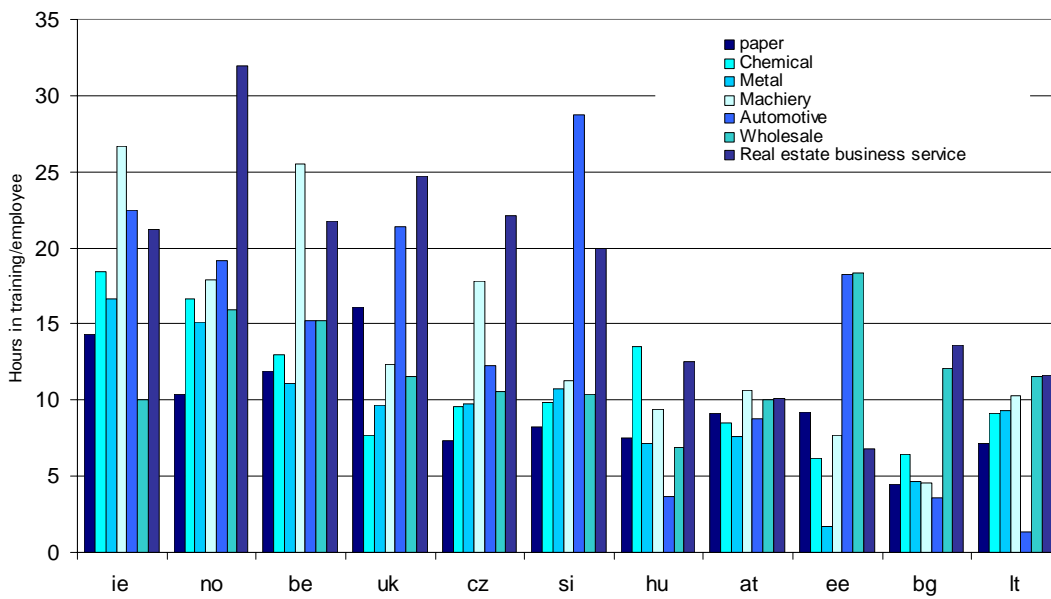
Source: Eurostat

Diagram 5 Available sector breakdowns in CVTS II – Example of Belgium (hours per employee/enterprises with training)

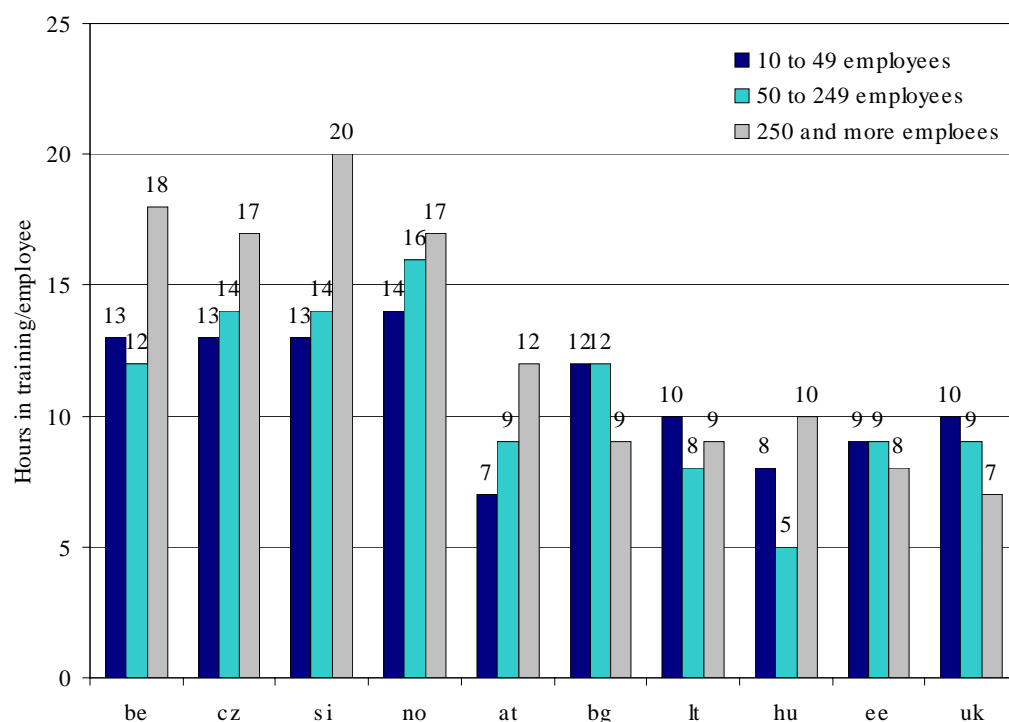


Source: Eurostat

Diagram 6 Training in selected sectors for case study – Training hours per employee (only enterprises with training) – 1999



Source: Eurostat

Diagram 7 Hours in training per employee – enterprises with CVTS only (CVTS 1999 and 2005)

Source: Eurostat

We sum up the main recommendations for using CVTS data.

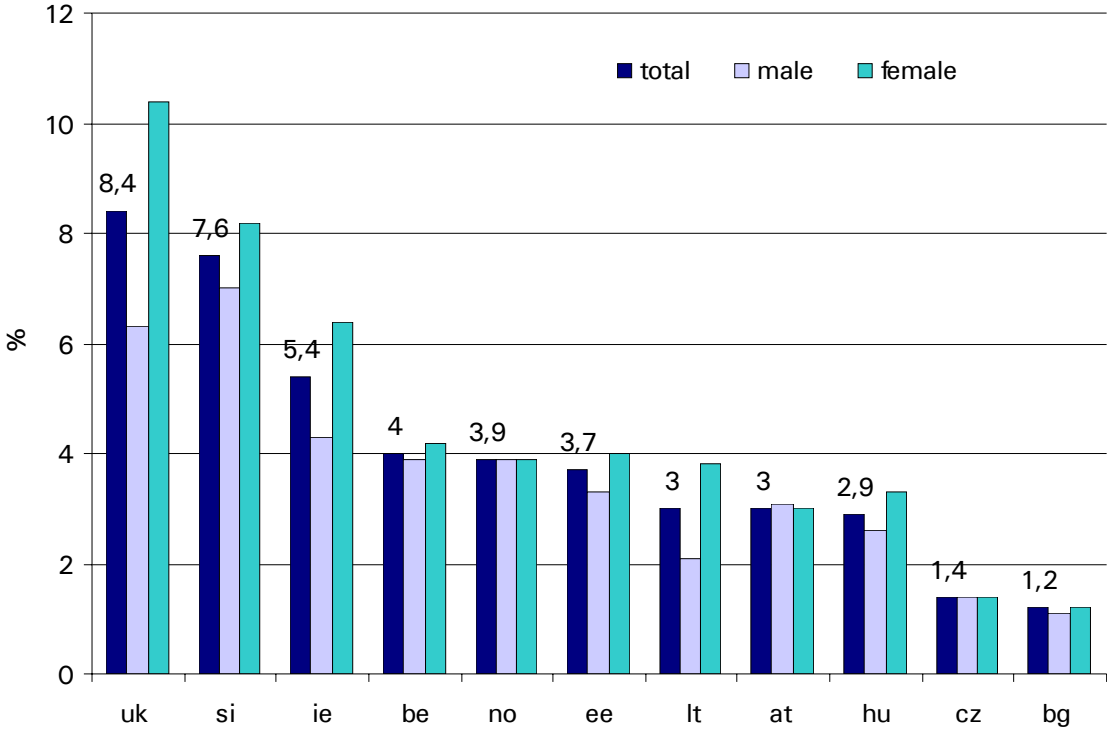
- The most useful indicators to assess enterprises' training culture are the number of training hours per employee and the participation rate.
- Average figures do not represent an 'average' enterprise. Enterprises with a clear commitment to training are expected to invest distinctly more than the average. The majority of enterprise will invest even less than the average
- Differences in the average training activity between sectors and size classes tell more about the composition of enterprises with reactive/expansive training cultures (respectively the proportion of enterprises excluded from the option to provide training successfully) than about differences in the actual 'training need' in a sector. In any sector, there are enterprises with a considerable high training activity. The same is true for small and medium enterprises.

For further reading on how to interpret CVTS data we recommend our article MARKOWITSCH, J. & HEFLER, G. (forthcoming) 'To Train or Not To Train – Explaining differences in average enterprise training performance in Europe – a framework approach.' In MARKOWITSCH, J. & HEFLER, G. (Eds.) *Enterprise Training in Europe – Comparative Studies on Cultures, Markets and Public Support Initiatives*. Vienna, Lit-Verlag. (A draft will be made available for the Budapest Meeting)

4. Formal Adult Education, Workplace Learning and Training

As already discussed in the introduction, little research is available on the relations between formal adult education, workplace learning and training. Diagram 8 illustrates the comparatively rare nature of participation in formal education in most of the countries represented in the partnership.

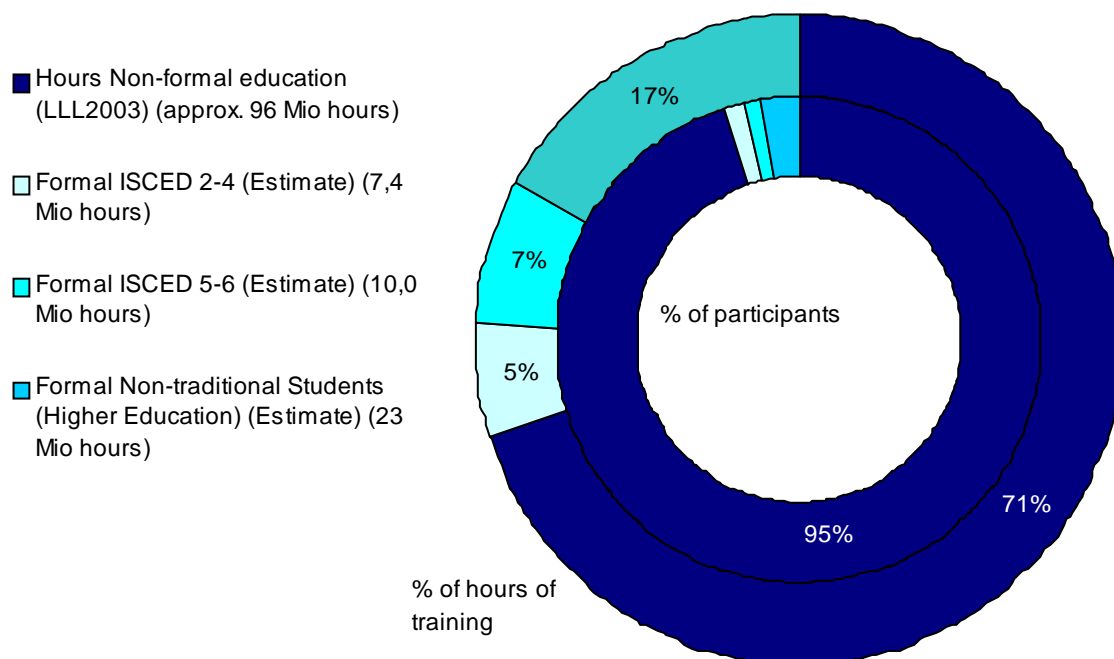
Diagram 8 Participation of employed (25–64) in formal education within the past 12 month (ILL2003)



Source: Eurostat

Despite the comparatively small proportion of employed people participating in formal education, we know well that the overall importance of formal adult education is significant. Speaking of the invested efforts to learn, participants in formal adult education are likely to devote a significant proportion of all learning activities in a country. For Austria, we have estimated that roughly a quarter of all learning activities (teaching hours only) take place within offers of formal adult education (see Diagram 9).

Diagram 9 Proportion of learning hours of formal adult education of all hours in adult education in Austria – Estimate



Source: Eurostat

Speaking of the significance of formal learning for workplace learning and training, a closer look on existing case studies on HRD in enterprises may show that there are much more links than expected. Overview 4 provides a selection of eight examples of formal education which might be identified in Austrian enterprises. These possible “patterns” reflect a part of the HRD strategy of enterprises. In addition, the patterns reflect rather specific features of the formal education system in Austria. Altogether, the list provides a first impression of how different the patterns might be that we expect to find within the case studies for SP 4. While on the one hand, we are interested in setting up an extensive list of examples; on the other hand, we are interested in developing a framework to analyse and understand the patterns by relating them to the features of the enterprises, their HRD policy and the national qualification system. To sum up, we are interested in:

- What pattern of linking organisational issues, workplace learning and individual issues together (or holding them separate) can we find?
- What are the reasons for enterprises to adopt a certain pattern?
- What general policies towards patterns of formal adult education can we find?
- Why do enterprises develop certain policies? (How large is their relative autonomy in developing such approaches?)
- Are there specific characteristics of enterprises that enlarge or limit this relative autonomy for an approach?

Overview 4 Proportion of learning hours of formal adult education of all hours in adult education in Austria – Estimate

Example – short	Comments/Explanation
Transformation of internal training offers for high-potentials in a MBA program in co-operation with a public university	Internal high-potential programs of a bank and one insurance group were ‘up-graded’ to an official MBA program by public universities
Cooperation with public technical schools for formal and non-formal further education for adults	Local enterprises co-operate with a local technical school in the field of initial vocational training as well as formal adult education
New formal qualification offered by leading for-profit providers in company training	For-profit training providers connected to major enterprises for investment goods (IT; automatisation) have reshaped their offers so that modules could be combined for formal qualifications on different levels (e.g. an apprenticeship in automatisation; the training provider has contributed significantly in the definition of the new form of apprenticeship; MBA programmes certified by using co-operation’s with international universities)
Support for individual employees to participate in post secondary/post graduate education	In different European programmers, substantial co-funding offers (up to Euro 30,000 per individual employee) has been available for different target groups (e.g. all female employees, employees older than 40; all employees in managerial positions). Enterprises’ own contributions are between 25%–33%. Based on this co-funding offers, enterprises co-funded participation in formal education based on individual agreements with employees.
Preparation for Foreman examination as part of enterprise training (special case of <i>Werkmeisterprüfung</i>)	A company pays for the courses preparing for the <i>Werkmeisterprüfung</i> for an employee who should replace a foreman preparing for retirement
<i>Außerordentliche Lehrabschlussprüfung</i> – truck driver	Truck drivers are prepared for a special vocation; they receive higher payments (set by the collective agreement) and enjoy <i>Berufsschutz</i> (the right to refuse to change the occupation for a period) when they become unemployed (which can be also an advantage for the employer who plan to hire again former employees after a short period)
Non-traditional students in low-qualified job to earn a living while studying	A substantial part of non-traditional students work while studying – often, there is no connection between the occupation and the field of study; the organisation and the employee take it for granted that employment will be terminated shortly after finishing the education
Skilled technical employees attending a higher technical school in the evening despite the explicit disapproval of their employer	At higher technical schools, diplomas are connected to substantially higher wages, peripheral employers with considerable low-wage level cannot compete with employers in the centre; therefore, employers partly discourage their medium skilled technical staff to participate in formal education (Higher Secondary School, ISECD 5b)

5. Reflections on the methodology of SP 4

Scope and limitations of SP 4

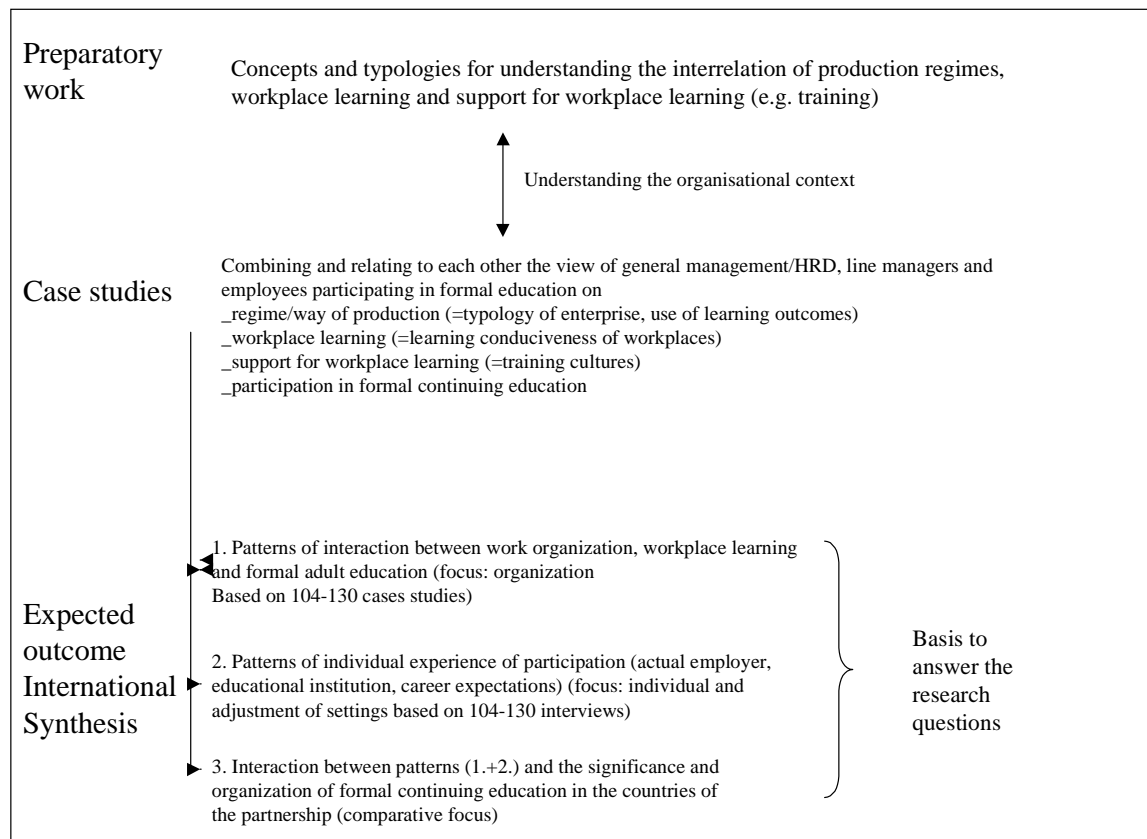
The scope of the work package is clearly defined by the methodology chosen (case studies) and the available number of observations. The SP 4 focuses on employees' participation in formal adult education and their employers' support for their involvement. Because little is known about the existing patterns of these co-operations, the case studies will be oriented mainly towards the task of deciphering its logic.

As we expect a broad variety of different patterns, the available number of case studies will be sufficient to get a clear picture of how and why enterprises support their employees in participation in formal education. We will be able to understand the rationale behind the behaviour of the organisation – represented by the general management and by the line managers and the individual employees.

As a consequence, heterogeneity between the enterprises chosen by the partners for conducting their case studies will be not an obstacle, but part of the research strategy, as we are particularly interested in the differences between patterns.

However, our approach will not allow any research comparing sectors or – even less feasible – countries. Given the variety of patterns, any selection of enterprises in a country could be nothing else than quite accidental and in no way representative for the enterprises in one country. Therefore, we use the examples from different countries to secure a large variety of cases, so that we can examine and understand a high number of patterns. We are interested in differences between patterns, not in differences between countries or sectors, which are beyond the scope of SP4.

Only in one single, but crucial dimension, comparative work is feasible and will therefore be explicitly addressed: In different countries, formal adult education plays a completely different role. Crucial differences between countries are marked by the establishment or non-establishment of National Qualification Frameworks or mechanisms to acknowledge prior learning. So we expect to see clear interactions between the significance of formal education within adult education and the patterns found within the enterprises. The interrelation between enterprises' approaches to formal education of their employees and this particular aspect of the significant environments will therefore be explored in detail and will mark the *only* dimension for cross-country comparison.

Overview 5 Levels of Work in SP 4 – Expected Outcomes

Interlinkage of the case study approach to the work program of SP 4 and the research questions

A first outlook for SP 4 was formulated without a specific focus on formal education in enterprises and in particular SMEs. The HRD, training and workplace learning in SMEs are actually a regular subject of national and comparative research projects; (Dawe and Nguyen, 2007) cover more than 900 research publication on that topic. In the more general part, the SP 4 research can rely therefore on existing studies and data coming from different surveys (CVTS, Survey on Training in SMEs).

Within the case studies, of course, also more general aspects of learning and training cultures in enterprises will be addressed. Here, our goal is to understand the embeddedness of the support/non-support of formal education in a general training and HRD culture. At the same time and for properly understanding HRD and training, we have to learn about workplace learning in general, which depends primarily on the general principles of how work is organized in an organisation and how improvements of skills and competencies may lead to improved outcomes for the organisation.

Therefore, while most of the original research questions will be covered by combining a literature survey and particular contributions from the case studies, the work with the case

studies will focus clearly on the specific nature of support for formal education of employees in comparison to any other form of training offers and support for workplace learning by enterprises.

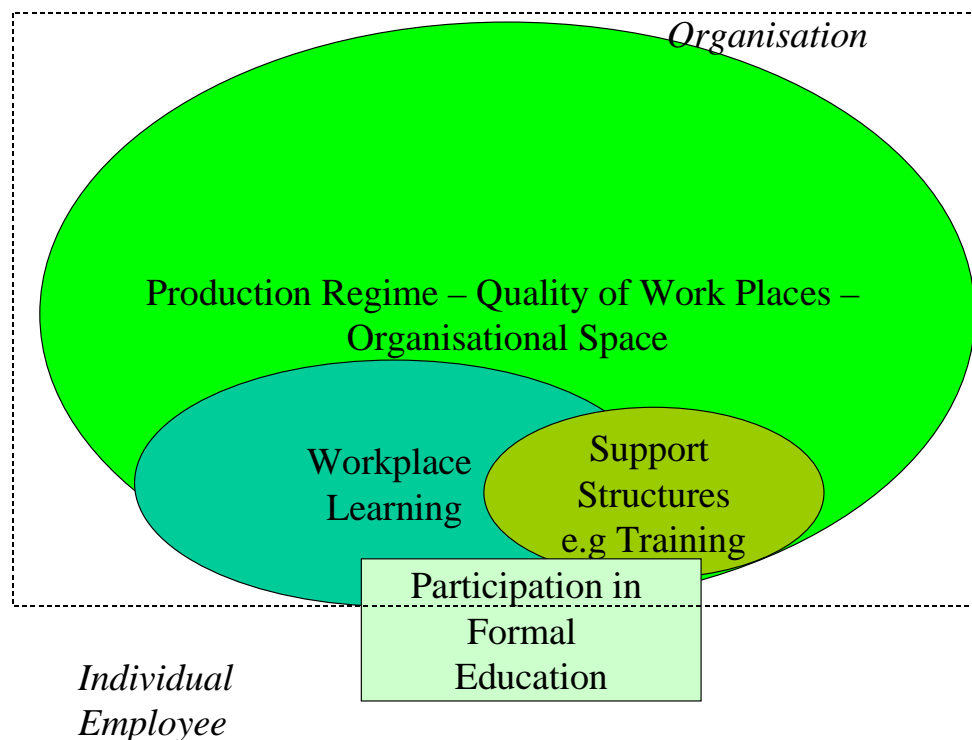
For this clear focus, we will propose further specifications of the SP 4 research questions.

Overview 6: Research questions and sources for answering these questions

Research Question in the work description	Literature work	Case Studies		
		Management	Line Management	Participant
- How can the employers, especially SME, promote the participation of adults LLL?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- Which are the main obstacles (for example tax policy, financial etc.) for SMEs to invest in LLL?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- Which are the main reasons and motivations for SMEs to invest in LLL?	<input checked="" type="checkbox"/>			
- Under which circumstances is LLL seen as an investment or as costs?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- How do SMEs value the national situation for CVT?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- How do SMEs perceive national measures undertaken to foster LLL in the companies?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- Which critical parameters for the investments in LLL in a national and international context can be concluded from the survey?	<input checked="" type="checkbox"/>			
- How do SMEs perceive differences of formal, non-formal and informal learning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- How do SME managers/personnel manager perceive the negotiation processes with the employees concerning financing of training/learning		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- How do national measures influence the negotiation processes between employees and employers concerning financing of training/learning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- How/Why do SMEs exclude certain groups from training or why are they more in favour of investing in one group than the other?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
- How do employees get access to companies' support of training?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- How do employees perceive/interpret negotiation processes with the employer concerning financing of training/learning?	<input checked="" type="checkbox"/>			
- How is training/learning linked with the work process in SMEs?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Context for the case studies – General reflections

Diagram 10: Interplay between topics of the interviews



Source: Own description

For understanding the interaction of formal education of employees and their employer's organisations, different overlapping layers have to be considered:

- In general, we have to be aware that participation in different forms of formal adult education will be situated for many cases in an overlapping sphere characterized by the aims, motivations, resources and experiences of the individual employees and the characteristics of the employer organisation.
- In particular, we are interested in the interaction of participation in formal education with workplace learning – understood as the learning experiences made in the daily work process and supported by the structure of the workplace's social field that includes the specific support offers for workplace learning by the organisation, e.g. by structured appraisal interviews, communication structures and – in particular – training courses of different types. Workplace learning and work experiences can be expected as a crucial input for formal adult education. Educational offers may use or not use the available resources from the current work of their participants. At the same time, within the support structures for enterprise training, enterprises can explicitly go for training offers, which qualifies as formal education; e.g. this is explicitly required by the *Investors in People* standard (Taylor and Thackwray, 1997). The commonness or rarity of this approach will

depend mainly on the traditions of the national skill formation system and the existence of a National Qualification Framework and instruments for acknowledging prior learning.

- The interaction between workplace learning and support offers for workplace learning that include training and participation in formal adult education must be analysed in the light of an overall regime of production and competitive strategies. Organisational methods of achieving their goals determine the options for transforming learning outcomes into improvements in processes and contributions to success. Therefore, to understand workplace learning and its available support mechanisms, we need to consider how an organisation generally functions and the actual importance of the employees' competencies.

For these reasons, we propose to use the planned interviews in the case studies to collect the observation on the four mentioned levels. The three different groups of interviewees (general management/HRD; line managers; employees participating in formal education) can contribute to each of the four levels. Their contributions will focus on different aspects of the four levels and will express different interests of the parties. The following table outlines how the interviews with different agents will contribute to the overall outcome of the case studies.

Overview 7 Interplay between the three types of interviews

Levels	General Management Training Management	Line Manager (s)	Employee(s)
Examples for topics in the interviews			
Production Regime Quality of Work Places	Structure of workplaces; contributions of human resources/work to the total value added general strategy (competition on prices, quality, USP ...)	Description of the tasks on unit level; responsibilities, recent changes in the modes of production; difficulties faced on unit level	Description of their own work place; description of recent developments in the work place (job enlargement, job enrichment...)
Workplace Learning	Implicit/explicit policies towards restrictive/expansive workplace learning (Fuller and Unwin, 2004) Learning Organisation	Organisation Learning on the unit level; support for workplace learning as implicit/explicit part of the own job description and professional understanding	workplace's conduciveness to learning
Support Mechanisms for Workplace Learning; HRD Training in Particular	HRM-Policy (e.g. compensation, incentive wage) HRD-Policy (e.g. career pathways, appraisal interviews) Tools e.g. training budget, training organisation	Appraisal Interviews Training offers (ways to choose, to negotiate and to decide on training)...	Appraisal Interviews; Experiences with training, negotiating training with the line manager...
Participation in Formal Education	Policies in favour of/opposing to/ indifferent to participation in formal education	Interaction with training/support mechanisms in general; adjustment to the targets of the unit Ways to support/non- support participation Ways to integrate and use the learning outcome	Interaction of the formal education with workplace learning and training; options to use the qualification in/outside the enterprise Individual career goals and its conditions (staying versus leaving)

Considerations for focussing exclusively on for-profit enterprises

Reasons are quite different for why an organization invests in training and development of their employees. To gain a comprehensive understanding of why organizations engage in learning policies and why they develop specific training cultures and cultures of workplace learning, the various links between work place learning of individuals and the fulfilment of organisational goals must be deciphered.

For-profit organizations and non-profit organization in the private sphere and the public sphere have significantly different organizational goals, different rationale of behaviour and different concepts of effectiveness and efficiency. Therefore, to understand the specific contributions of workplace learning to the goals of the organizations, it would be necessary to develop concepts separately for for-profit organizations, for private non-profit organizations and for government organisations (normally governed by specific regulations and principles of good administration, deeply embedded in local legal and political traditions). At the same time, patterns of providing training and further education differ significantly between the three types of organization mentioned. Normally, totally different agents (e.g. training providers), regulations and traditions are found in the three different fields within each country. Actually, training and further education in these three types of organization form three completely different fields of research.

Although clearly restricting work in SP 4 to for-profit organization in certain groups of sectors, we recognise the importance of all the other organizations.

Selection of common sectors for the interviews in SP 4

By defining common sectors for the interviews in SP 4, we intend to support two goals:

- Firstly, we seek to make sure that enterprises investigated are similar enough and share similar features in the 13 partner countries. By increasing similarity between enterprises, we enlarge our possibilities to interpret the differences discovered.
- Secondly, we seek to reduce efforts necessary for contextualisation. Preparing enterprise case studies includes an analysis of the development of the enterprise's particular sector. Equally important are the general developments (driven, for example, by technological progress, outsourcing of part of the production in the course of globalisation, increase of competition, etc.) and the regional development, which can be quite different from the general trends. The specific situations of enterprises surveyed are interpreted in the light of these general tendencies.

Defining common sectors for comparative work also involves risks. We would like to highlight the two most important risks:

- Shortage of suitable enterprises, prepared to participate in the study: By defining sectors, the number of available enterprises in a region may become rather limited.
- Unexpected large heterogeneity between enterprises of one and the same sector. Differences between enterprises in the same sector can be much larger than between enterprises of different sectors. The expected common features for a

sector (e.g. intense use of technology) can be very wrong for many of the enterprises classified as members of the sector. Heterogeneity increases for two main reasons:

- On the one hand, more and more organizations are active in quite different fields. Quite typically, they keep a part of their production capacities, but develop a sales and service organization of equal or larger importance. Sector classification may remain unchanged for quite a long time, even when the production processes' dominant characteristics have changed.
- On the other hand, sector dynamics leads to a few mainly larger enterprises with quite 'expected' features and many small enterprises, focussed either on the provision of services for larger organizations in a supply chain or highly specialized on a quite minor aspect of the products within the sector, producing for the wider market.

While the first argument asks for a cautious definition of sectors, the second argument highlights the fact that defining sectors will not avoid surveying heterogeneous enterprises.

To achieve, at least partially, the goals of choosing common sectors and avoiding the previously described difficulties, we propose:

- to define a number of main characteristics that the enterprises included in the survey should share; and
- to define 'sector families' instead of single sectors and thus increase the number of enterprises eligible for participating in the survey.

Because supporting adults in formal education may be a rare feature of enterprises, we would like to define more open 'sector families'. The main disadvantage would be that the increased use of different sectors will require additional work for describing the specific situation of the enterprises within its sectors.

Considerations for the definition of two-sector families

Enterprises can follow different strategies to link the HRD activities to specific organizational goals. Of course, for-profit enterprises share general goals and therefore specific targets supported by the further development of their employees' competencies should lead to increased organisational effectiveness and efficiency and increased return on the assets invested in the corporation.

Moreover, specific strategies and organizational principles are expected to lead regularly to a stronger involvement in HRD and training and – as a consequence – a higher probability to support formal adult education of the employees. We propose to investigate the following three strategies:

Strategy based on the development of innovation capacity: Enterprises may organize their business model around the early adoption of innovations within their production processes and/or the placement of products based on innovative approaches. Thereby, the employees' capacity to innovate in all stages of the production cycle becomes a strategic goal in itself.

Strategy based on quality management: Enterprises may base their strategy on total quality management approaches, so that they qualify to become part of supply chains of major industrial players (e.g. in the automotive sector, in the aeronautic industries).

Strategy based on customer-relationship management: Enterprises may focus on the development of close relationships with their core customers, using information provided within these relationships to improve their services.

Naturally, we expect to find combinations of two or even all three of these strategies.

We have chosen the sector families according to our expectations to find a significant number of enterprises applying one of these strategies. We expect to find enterprises with at least one of the first two mentioned strategies mainly in sector family 1 and enterprises following the third strategy mainly in the sector family 2.

Overview 8 - Small and Medium Enterprises: 10 to 249 employees (excluding the micro level)

	Sector Families	
	Production	Service
Level of pre-selection	Machinery/electronic (NACE 2002 1.1 – dk_dl) Metals (NACE 2002 1.1 – dj) Production of vehicles (NACE 2002 1.1 – dm) Paper/Chemical industries (– de; df_to_di)	Whole sales (NACE 2002 1.1 g51) Any business-to-business activity in the service sector (exception: banking and insurance) Any business-to-business activity in the service sector (NACE 2002 1.1 – k; NACE 2002 1.1 – o – if Business-to- Business)
Continuum – Classification is made based on the enterprise results; if possible, partners should achieve a balanced mix	Innovation driven (product and/or process innovation); Quality Management driven Traditional local provision; Competing on prices	Customer relationship management driven Traditional local market; Competing on prices

Annex

An Excel file containing all available CVTS II + III indicators is available by the DUK team.

CVTS II (1999) – Average hours in training per employee (all enterprises) – breakdown for 20 sectors (NACE classes)

		<i>eu25</i> European Union (25 countries)	<i>be</i> Belgium	<i>bg</i> Bulgaria	<i>cz</i> Czech Republic	<i>ee</i> Estonia	<i>ie</i> Ireland	<i>lt</i> Lithuania	<i>hu</i> Hungary	<i>at</i> Austria	<i>si</i> Slovenia	<i>uk</i> United Kingdom	<i>no</i> Norway
NACE	Sex												
	<i>t</i> Total	11	13	4	10	6	17	4	5	9	8	13	16
<i>c_to_k_o</i> All NACE branches covered by CVTS (Continuing Vocational Training)	<i>m</i> Males	12	:	5	11	6	16	4	5	9	9	14	13
	<i>f</i> Females	10	:	4	9	6	18	4	4	10	7	12	23
<i>c_e_f_b_i</i> Mining and quarrying; electricity, gas and water supply; construction; hotels and restaurants; transport, storage and communication	<i>t</i> Total	12	8	8	9	6	18	6	7	8	9	15	13
	<i>m</i> Males	12	:	8	10	6	14	5	7	7	9	15	9
	<i>f</i> Females	13	:	10	9	5	25	6	8	8	7	15	24
<i>c</i> Mining and quarrying	<i>t</i> Total	13	3	3	8	1	5	4	3	6	7	41	26
	<i>m</i> Males	11	:	4	8	0	4	4	4	6	6	40	10
	<i>f</i> Females	20	:	2	6	2	5	4	2	10	9	46	130
<i>d</i> Manufacturing	<i>t</i> Total	10	12	2	10	4	18	3	4	8	8	12	14
	<i>m</i> Males	10	:	3	11	4	18	4	4	8	8	11	9
	<i>f</i> Females	9	:	1	8	3	17	3	3	7	7	16	27
<i>da</i> Manufacture of food products; beverages and tobacco	<i>t</i> Total	9	11	1	8	3	18	2	4	6	4	18	13
	<i>m</i> Males	9	:	1	11	3	16	2	4	7	4	19	12
	<i>f</i> Females	8	:	2	5	2	21	2	4	4	5	18	13

<i>db_dc</i> Manufacture of textiles and textile products; manufacture of leather and leather products	<i>t</i> Total	4	5	1	6	4	3	4	1	2	6	6	4
	<i>m</i> Males	5	:	1	7	6	4	4	1	4	9	6	7
	<i>f</i> Females	3	:	1	6	3	3	4	1	1	6	7	3
<i>dd_dn</i> Manufacture of wood and wood products; manufacturing n.e.c.	<i>t</i> Total	6	4	1	6	2	17	1	1	6	4	19	7
	<i>m</i> Males	6	:	1	6	2	17	1	1	6	3	16	6
	<i>f</i> Females	7	:	1	4	2	13	1	2	7	4	28	8
<i>de</i> Manufacture of pulp, paper and paper products; publishing and printing	<i>t</i> Total	10	10	2	6	7	14	3	3	8	5	14	10
	<i>m</i> Males	10	:	3	6	8	13	3	2	9	6	12	8
	<i>f</i> Females	10	:	2	6	7	17	2	3	8	4	18	14
<i>df_to_di</i> Manufacture of coke, refined petroleum products and nuclear fuel; chemicals, chemical products and man-made fibres; rubber and plastic products; other non-metallic mineral products	<i>t</i> Total	11	11	4	9	4	17	6	8	8	8	7	16
	<i>m</i> Males	11	:	5	10	4	21	7	9	7	8	7	5
	<i>f</i> Females	10	:	2	8	3	11	3	8	12	9	6	59
<i>dj</i> Manufacture of basic metals and fabricated metal products	<i>t</i> Total	8	8	3	9	1	11	4	3	7	7	9	13
	<i>m</i> Males	8	:	4	9	1	10	4	2	6	7	9	9
	<i>f</i> Females	8	:	0	8	2	11	2	6	8	7	8	49

<i>dk_dl</i> Manufacture of machinery and equipment n.e.c.; manufacture of electrical and optical equipment	<i>t</i> Total	12	24	2	16	5	24	7	5	10	9	12	17
	<i>m</i> Males	12	:	2	16	7	25	7	5	12	10	12	11
	<i>f</i> Females	13	:	2	17	3	22	7	4	7	7	13	43
<i>dm</i> Manufacture of transport equipment	<i>t</i> Total	18	14	2	12	15	20	1	2	8	25	21	18
	<i>m</i> Males	15	:	3	13	18	24	1	2	8	25	6	11
	<i>f</i> Females	32	:	0	10	6	15	1	2	9	28	96	79
<i>e</i> Electricity, gas and water supply	<i>t</i> Total	15	15	6	12	9	26	11	14	11	27	17	25
	<i>m</i> Males	15	:	7	12	9	29	13	14	11	31	15	21
	<i>f</i> Females	17	:	2	13	8	17	8	15	8	13	23	41
<i>f</i> Construction	<i>t</i> Total	10	5	1	9	5	8	3	3	5	3	22	9
	<i>m</i> Males	9	:	1	9	5	7	3	2	5	2	19	7
	<i>f</i> Females	19	:	2	7	4	16	2	6	6	3	35	34
<i>g</i> Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	<i>t</i> Total	9	10	2	6	9	10	2	3	9	3	9	13
	<i>m</i> Males	10	:	2	8	8	11	3	4	9	3	10	14
	<i>f</i> Females	7	:	2	5	9	8	2	3	10	3	7	12
<i>g50</i> Sale, maintenance and repair of motor vehicles	<i>t</i> Total	10	9	1	10	5	4	4	5	11	6	9	11
	<i>m</i> Males	11	:	1	10	6	4	5	6	12	5	9	10
	<i>f</i> Females	9	:	1	9	3	4	2	4	8	8	8	16
<i>g51</i> Wholesale trade and commission trade, except of motor vehicles and	<i>t</i> Total	10	9	4	7	11	7	3	2	9	3	11	15

motorcycles	<i>m</i> Males	10	:	4	8	13	7	3	2	8	3	11	14
	<i>f</i> Females	9	:	4	6	10	7	2	2	10	3	10	18
<i>t</i> Total		7	11	1	5	8	12	1	4	9	3	7	12
<i>g52</i> Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods	<i>m</i> Males	8	:	1	7	3	18	1	4	7	2	7	16
	<i>f</i> Females	6	:	1	4	10	9	1	3	9	3	6	9
<i>t</i> Total		6	8	1	6	2	27	1	9	2	7	5	6
<i>b</i> Hotels and restaurants	<i>m</i> Males	5	:	1	8	2	24	1	11	3	8	4	7
	<i>f</i> Females	6	:	2	6	2	29	0	7	2	7	5	6
<i>t</i> Total		15	8	18	10	6	14	2	5	9	10	15	10
<i>i60_to_i63</i> Land transport; transport via pipelines; water transport; air transport; supporting and auxiliary transport activities; activities of travel agencies	<i>m</i> Males	15	:	17	10	7	14	2	5	9	12	14	6
	<i>f</i> Females	15	:	22	10	4	17	3	7	12	5	15	28
<i>t</i> Total		17	33	9	11	10	10	22	6	14	9	25	43
<i>i64</i> Post and telecommunications	<i>m</i> Males	18	:	7	10	11	12	30	8	13	8	23	30
	<i>f</i> Females	16	:	10	11	9	9	17	4	14	12	28	69
<i>t</i> Total		15	22	7	28	30	14	9	9	26	15	10	23
<i>j</i> Financial intermediation	<i>m</i> Males	18	:	5	33	26	15	12	7	25	17	14	23
	<i>f</i> Females	13	:	8	26	32	14	7	9	28	14	7	24

<i>j65_j66</i> Financial intermediation, except insurance and pension funding; insurance and pension funding, except compulsory social security	<i>t</i> Total	15	22	7	29	32	17	9	9	27	15	9	24
	<i>m</i> Males	18	:	5	34	28	17	12	7	25	17	14	24
	<i>f</i> Females	13	:	8	26	33	16	8	9	29	15	7	25
<i>j67</i> Activities auxiliary to financial intermediation	<i>t</i> Total	17	21	5	16	10	8	5	-	6	4	16	11
	<i>m</i> Males	17	:	4	18	10	8	5	-	7	8	16	12
	<i>f</i> Females	17	:	5	13	10	9	5	-	5	2	16	9
<i>k_o</i> Real estate, renting and business activities; other community, social, personal service activities	<i>t</i> Total	14	18	4	14	3	20	3	4	8	10	17	28
	<i>m</i> Males	16	:	3	16	3	20	3	4	7	10	18	24
	<i>f</i> Females	12	:	4	12	3	20	3	5	8	9	14	34
<i>k</i> Real estate, renting and business activities	<i>t</i> Total	17	20	3	17	4	18	5	5	9	12	24	31
	<i>m</i> Males	20	:	3	18	4	22	5	5	8	14	26	26
	<i>f</i> Females	13	:	2	14	4	15	5	6	10	11	18	39

	<i>t</i> Total	7	12	5	5	1	24	1	2	3	4	4	17
<i>o</i> Other community, social, personal service activities													
	<i>m</i> Males	6	:	3	6	1	14	1	2	3	2	4	13
	<i>f</i> Females	8	:	7	5	2	30	1	3	3	6	5	20

Detailed Definition of Sector Families (According to Statistical Classification of Economic Activities in the European Community, Rev. 1.1 (2002))

For detailed information, please visit:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=NACE_1_1&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIRARCHIC&CFID=9728321&CFTOKEN=a4d045808f5cc2d9-6F219518-E990-A1B9-E5ED493E3A0EC789&jsessionid=ee30cc9c78624ed26666

Sector Family A:

Machinery/Electronics (NACE 2002 1.1 – dk_dl)	(29) Manufacture of machinery and equipment n.e.c. (30) Manufacture of office machinery and computers (31) Manufacture of electrical machinery and apparatus n.e.c. (32) Manufacture of radio, television and communication equipment and apparatus (33) Manufacture of medical, precision and optical instruments, watches and clocks
Metals (NACE 2002 1.1 – dj)	(27) Manufacture of basic metals (28) Manufacture of fabricated metal products, except machinery and equipment
Production of vehicles (NACE 2002 1.1 – dm)	(34) Manufacture of motor vehicles, trailers and semi-trailers (35) Manufacture of other transport equipment
Paper/ /Printing (NACE 2002 1.1 df_to_di)	(21) Manufacture of pulp, paper and paper products (22) Publishing, printing and reproduction of recorded media
chemical industries(NACE 2002 1.1 – de)	24.1 Manufacture of basic chemicals 24.2 Manufacture of pesticides and other agro-chemical products 24.3 Manufacture of paints, varnishes and similar coatings, printing ink and mastics 24.4 Manufacture of pharmaceuticals, medicinal chemicals and botanical products 24.5 Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations 24.6 Manufacture of other chemical products 24.7 Manufacture of man-made fibres

Sector Family B:

In the sector k and o, only enterprises with a focus on business-to-business activities should be selected.

Whole Trade sales (NACE 2002 1.1 – g51)	51.1 Wholesale on a fee or contract basis 51.2 Wholesale of agricultural raw materials and live animals 51.3 Wholesale of food, beverages and tobacco 51.4 Wholesale of household goods 51.5 Wholesale of non-agricultural intermediate products, waste and scrap 51.8 Wholesale of machinery, equipment and supplies 51.9 Other wholesale
NACE 2002 1.1 – k	71 Renting of machinery and equipment without operator and of personal and household goods 72 Computer and related activities 73 Research and development 74 Other business activities
NACE 2002 1.1 – o (if business to business)	90.01 Collection and treatment of sewage 90.02 Collection and treatment of other waste 90.03 Sanitation, remediation and similar activities 92. 4 News agency activities 93.01 Washing and dry-cleaning of textile and fur products

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General Context of the LLL 2010 Research Project

In March 2000, the then 15 European leaders committed the European Union to become by 2010 “the most dynamic and competitive knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment”. The Lisbon strategy, as it has come to be known, was a comprehensive but interdependent series of reforms, which has significant implications for a whole range of social policies, including policies for learning.

As part of the Lisbon strategy, the European Union has set the goal of raising the number of adults participating in lifelong learning to 12.5% by 2010. However, the proportion of learning adults in Europe differs widely across countries. The project "**Towards a Lifelong Learning Society in Europe: the contribution of the education system**", which forms part of the European Commission’s 6th Framework Research Program, is dedicated to identifying the reasons behind these differences and to studying the policies and practices related to adults’ participation in and access to lifelong learning in a number of European countries (see project's web-page <http://LLL2010.tlu.ee>).

The project involves researchers from thirteen countries and regions of Europe: Scotland, England, Ireland, Austria, Belgium, Slovenia, Czech Republic, Estonia, Lithuania, Hungary, Bulgaria, Norway and Russia.

Project objectives

The objectives of this project are to:

- Show to what extent the countries differ in terms of patterns of lifelong learning.
- Reveal how these differences depend upon specific institutions and policies of each country.
- Assess the contribution of each country’s education system to the development of lifelong learning.
- Trace the ways institutional and policy prerequisites for lifelong learning have been developed in European countries.
- Identify the barriers to participation in lifelong learning in terms of policies, educational institutions, enterprises’ practices and potential learners’ motivation.
- Identify the best solutions and most successful practices in terms of participation in lifelong learning and to decide to what extent these would be applicable in other countries.
- Propose changes, which would enhance adult participation in lifelong learning and decrease social exclusion.

The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

Potential impact

Project is expected to contribute both to competitiveness and cohesion of the EU by (a) developing and carrying out a joint agenda for a better understanding of the tensions between the knowledge-based society, lifelong learning and social inclusion in the context of enlargement of the EU and globalisation, (b) identification of best practices and suggestion of ways for implementation in order



to reach the objectives for lifelong learning. The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

The plan for disseminating the knowledge

The project aims to examine and report on national differences in approaching formal lifelong learning, but also to assist policymakers and practitioners in learning appropriate lessons from contrasting practice in other countries. Therefore, disseminating knowledge to relevant audiences – individuals, institutional actors and policymakers – is of the core issues within this project, and so dissemination activity will take place throughout the life of the project.

The preliminary results will be discussed in the workshops and conferences and introduced to national as well as international audiences. The results of the different research projects within LLL2010 will be presented in five comparative reports – one per subproject – and a final report, and two books will be published as a result of the project. A Conference “The Contribution of the Education System to Lifelong Learning”, scheduled in the end of the project, is aimed at discussing findings, conclusions and expert opinions on a European level.

To contribute to scientific discussion and enhance comparative studies in the field, further analysis of the results of the research will take place in articles published in specialized and interdisciplinary journals. As LLL2010 will undertake a number of original studies, the data, questionnaires and codebooks, and all the other relevant materials generated in the project will be made available to the scientific community at large.

Research Institutions in LLL2010 Consortium

1. Institute for International and Social Studies, Tallinn University, Estonia
2. Higher Institute for Labour Studies, Catholic University of Leuven, Belgium
3. University of Nottingham, England, United Kingdom
4. Moray House School of Education, University of Edinburgh, Scotland, United Kingdom
5. Educational Disadvantage Centre, Centre for Human Development at St. Patrick's College, Dublin City University, Ireland
6. Fafo Institute for Labour and Social Research, Oslo, Norway
7. Slovenian Institute for Adult Education, Ljubljana, Slovenia
8. TÁRKI Social Research Centre, Budapest, Hungary
9. Centre for International Relations and Studies, Mykolo Romerio University, Vilnius, Lithuania
10. Institute of Sociology, Sofia, Bulgaria
11. St. Petersburg State University: Department of Sociology, Department of Retraining and Improvement of Professional Skills for Sociology and Social Work, Russia
12. 3s research laboratory, Vienna / Danube University, Krems, Austria
13. The National Training Fund, Prague, Czech Republic
14. Institute for Social Research, Vilnius, Lithuania

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