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REPORT

on the Commission communication on Making a European Area of Lifelong Learning a Reality
(COM(2001) 678 – C5-0165/2002 – 2002/2073(COS))

Committee on Culture, Youth, Education, the Media and Sport

Rapporteur: Kathleen Van Brempt

Draftsman (*): Herman Schmid, Committee on Employment and Social Affairs

(*) Hughes procedure

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(*) Hughes procedure

PROCEDURAL PAGE

By letter of 22 November 2001, the Commission forwarded to Parliament a Communication on Making a European Area of Lifelong Learning a Reality (COM(2001) 678 – 2002/2073(COS)).

At the sitting of 11 April 2002 the President of Parliament announced that he had referred the communication to the Committee on Culture, Youth, Education, the Media and Sport as the committee responsible and the Committee on Employment and Social Affairs, the Committee on Industry, External Trade, Research and Energy and the Committee on Women's Rights and Equal Opportunities for their opinions (C5-0165/2002).

At the sitting of 10 June 2002 the President will announce that the Committee on Employment and Social Affairs, which had been asked for its opinion, would be involved in drawing up the report, under the Hughes Procedure.

The Committee on Culture, Youth, Education, the Media and Sport had appointed Kathleen Van Brempt rapporteur at its meeting of 12 December 2001.

The committee considered the Commission communication and the draft report at its meetings of 25-26 March, 17-18 April 2002 and 3-4 June 2002.

At the last meeting it adopted the motion for a resolution unanimously.

The following were present for the vote: Michel Rocard, chairman; Vasco Graça Moura, vice-chairman, Mario Mauro, vice-chairman, Theresa Zabell, vice-chairman, Kathleen Van Brempt, rapporteur, Alexandros Alavanos, Pedro Aparicio Sánchez, Juan José Bayona de Perogordo (for Francis Decourrière), Rolf Berend (for Marielle de Sarnez), Christopher J.P. Beazley, Robert J.E. Evans (for Myrsini Zorba, pursuant to Rule 153(2)) Cristina Gutiérrez Cortines (for Roy Perry), Ruth Hieronymi, Ulpu Iivari, Lucio Manisco, Juan Ojeda Sanz, Barbara O'Toole, Doris Pack, Martine Roure (for Lissy Gröner), Giorgio Ruffolo, Marieke Sanders-ten Holte, Luckas Vander Taelen.

The opinions of the Committee on Employment and Social Affairs, the Committee on Industry, External Trade, Research and Energy and the Committee on Women's Rights and Equal Opportunities are attached.

The report was tabled on 6 June 2002.

The deadline for tabling amendments will be indicated in the draft agenda for the relevant part-session.

MOTION FOR A RESOLUTION

European Parliament resolution on the Commission communication on Making a European Area of Lifelong Learning a Reality (COM(2001) 678 – C5-0165/2002 – 2002/2073(COS))

The European Parliament,

- having regard to the Commission communication (COM(2001) 678 – C5-0165/2002¹),
 - having regard to Articles 149 and 150 of the EC Treaty,
 - having regard to Article 14 of the Charter of Fundamental Rights of the European Union, thereof,
 - having regard to the conclusions of the Lisbon, Santa Maria da Feira, Stockholm, and Barcelona European Councils,
 - having regard to its resolution of 8 September 2000 on the implementation, results and overall assessment of the European Year of Lifelong Learning 1996 ²,
 - having regard to its resolution of 23 October 2001 on the Commission Memorandum on lifelong learning ³,
 - having regard to the "Framework of actions on the lifelong development of competencies and qualifications" presented by the employers and trade unions at the Barcelona European Council,
 - having regard to Rule 47(1) of its Rules of Procedure,
 - having regard to the report of the Committee on Culture, Youth, Education, the Media and Sport and the opinions of the Committee on Employment and Social Affairs, the Committee on Industry, External Trade, Research and Energy and the Committee on Women's Rights and Equal Opportunities (A5-0224/2002),
- A. whereas the Commission Communication sets out an ambitious attempt to promote lifelong learning; whereas, however, more work needs to be done to clarify and refine the policy initiatives it recommends,
- B. whereas Member States must put lifelong learning into practice, making the necessary changes to education and vocational training systems,
- C. whereas access to skilled, trained and adaptable labour is important for European industry so as not to lose competitiveness vis-à-vis the outside world; education must therefore be

¹ Not yet published in the OJ

² OJ C 135, 7.5.2001, p. 304

³ Not yet published in the OJ

- dynamic and adapted to social change and the needs of the labour market,
- D. whereas all relevant actors in society must cooperate to create opportunities for lifelong learning,
 - E. whereas there is at present no firm agreement on what constitutes 'basic skills',
 - F. whereas mutual recognition of qualifications, knowledge and skills remains incomplete and constitutes a serious obstacle to mobility between Member States and the emergence of a Europe-wide labour market,
 - G. whereas efforts regarding the recognition and transferability of learning, whether formal or informal, should be stepped up with a view to fostering the promotion of learning within each Member State,
 - H. whereas the establishment by Member States of targets for expenditure on lifelong learning would facilitate peer review of progress in this area,
 - I. whereas, since they launch co-investment in learning, individual learning accounts are a useful tool for promoting lifelong learning; whereas the European Learning Account Project (ELAP) permits the exchange of data and good practice and takes account of different cultures and practices in education and training,
 - J. whereas it is important that the strategies developed within Member States aim to broaden access to lifelong learning,
 - K. whereas lifelong learning can be a tool for preventing marginalisation and social exclusion and can have a positive impact on workers' income and can boost employment,
 - L. whereas, despite the improvement in women's level of education and professional qualifications, considerable inequalities can still be observed between men and women in the employment market and in access to lifelong learning, with the result that women proportionally will increasingly end up in lower paid and lower skilled jobs in order to reach the 60% employment participation level,
 - M. whereas non-governmental organisations (including youth organisations and voluntary associations) have a wealth of experience in non-formal education on which governments could draw in implementing lifelong learning measures and strategies,
 - N. whereas it is essential to have an exact picture of the progress made within each Member State in promoting lifelong education and training, so as to be able to define specific targets through new programmes,
 - O. whereas the Commission is ideally placed to cooperate with Member States and international organisations such as OECD and the Council of Europe to promote the development of performance indicators and the spread of best practice in the field of lifelong learning, through a lifelong learning database and peer review,

- P. whereas the institutions of the European Communities currently pay insufficient attention to lifelong learning in their recruitment, staff training and promotion policies,
1. Welcomes the Commission's recognition that concrete policy measures in the field of lifelong learning should be based on the principles of democratisation and equality, personal development, the right of all to lifelong learning, shared responsibility, and a holistic approach to learning;
 2. Is convinced that lifelong learning is not merely a social necessity but must also be a social right for everyone irrespective of their age, sex or social background;
 3. Is of the opinion that transformation into a knowledge-based society means that access to education and training must be simplified;
 4. Points out that training cannot replace a deficient education and hopes that Community social policy on one hand and national education policies on the other can be coordinated to produce more training and more initial education while boosting education and training in those areas where they help narrow the gap between market expectations on the one hand and those of the general public on the other;
 5. Notes conclusion 45 of the Barcelona European Council;
 6. Emphasises that lifelong learning makes for increased occupational mobility on the labour market;
 7. Regrets that, two years after the Lisbon European Council, so little progress has been made by Member States and at European level towards developing clearly defined and adequately funded strategies for promoting lifelong learning;
 8. Recognises the wider social value of lifelong learning including improving quality of life, health, responsible citizenship, social inclusion and combating discrimination;
 9. Considers that, in order to attain a European area of lifelong learning, equal access needs to be ensured for everyone to education and training, through close cooperation between all relevant actors in society; integration programmes for immigrants should therefore be available even before pre-school age so as to avoid overlarge disparities at the first stage of educational opportunity;
 10. Calls on the Commission, in close collaboration with the Member States, to establish specific targets for lifelong learning, aimed in particular at those who have not completed upper secondary level education, at the unskilled, the functionally illiterate, the unemployed, individuals with special needs, individuals with learning difficulties, citizens who are more than 50 years old; immigrants and women following maternity leave; calls, further, on the Commission and the Member States to cooperate on the drafting of national strategies for lifelong learning in the Member States which do not have any such strategies, and also to cooperate closely with OECD to establish indicators to measure progress towards attaining these targets;

11. Agrees with the Commission objective of promoting investments, but deplores the fact that the steps the Commission suggests are not very concrete and therefore asks the Commission to better explore in which ways private investments have to be encouraged and to come up with concrete proposal as far as the role of local and regional education centres is concerned, as well as about the ways to support them;
12. Commends the proposal that everyone should be entitled to basic skills, including early school leavers via free compensatory learning later in life; this will allow such individuals to acquire the qualifications and skills necessary for them to play an active role in society and to have genuine access to the labour market;
13. Considers that socially disadvantaged and other excluded groups should be the target for lifelong learning policies because of the difficulties they often face due to poor literacy/numeracy and ICT skills and their alienation from education and training systems; calls for measures to provide incentives and opportunities specifically designed for such groups; at the same time, calls on the further training establishments to cooperate to increase the supply of further training in the Member States;
14. Calls on the Commission, acting in close collaboration with the Member States, to develop a European framework of basic skills to be acquired by all pupils before they leave compulsory school education; underlines that mastery of such skills by all pupils is necessary if they are to have equal access to further study and professional training;
15. Calls on public authorities to develop programmes to facilitate access to and improve the quality of training by developing local learning centres, based in schools and other locations, which can provide guidance to their users, offer training programmes based on learners' requests and strengthen links between the education system and local labour markets;
16. Considers that the issue of applying learning to deal with problems identified in the community should be recognised and that it is not just a question of providing more education courses but rather helping people to learn through their social and economic problems, including employment issues, and believes that in this respect education and training specialists would have to play a role as learning facilitators rather than formal teachers;
17. Calls for the competent public authorities and the Commission, in line with the affirmations made in Lisbon and Stockholm, to devise common guidelines for skills plans and validation systems which can be used to facilitate mutual recognition of certificates, diplomas and degrees and to compare the combined efforts of the Member States in the areas of training and skills development;
18. Welcomes the reaffirmation by the Member States, in conclusion 44 of the Barcelona European Council, of their commitment to ensuring that all school leavers are competent in two European languages other than their mother tongue(s);

19. Calls on the Commission to develop a network of lifelong learning centres in the Member States in order to facilitate both increased exchanges of information and experience and the identification and dissemination of good practice and experience;
20. Urges the Commission to develop, in cooperation with Member States, further mechanisms for credit transfers (including in vocational and professional education and training) and accumulation of qualifications;
21. Notes the Commission's belief that the SOCRATES, LEONARDO DA VINCI and YOUTH programmes, and joint actions between these, have an important role to play in promoting lifelong learning; underlines, however, that these programmes have their own distinct and more limited objectives, attainment of which must not be compromised;
22. Calls on the Commission, the Member States and the social partners to step up considerably their commitment to the recognition of skills obtained by non-formal or informal training, work experience and occupational training offered by or obtained through work in business or other sectors;
23. Urges Member States to take the necessary steps to promote the identification, assessment and recognition of non-formal and informal learning, to boost the exchange of information and experience about 'examples of good practice' at European level and to assist the Commission to draw up an inventory of national practices in this area and a framework for the exchange of experience;
24. Believes that lifelong learning must be based on a partnership between the public authorities, employers, social partners and individuals particularly in the area of non-formal and informal learning; calls for agreements setting out the responsibility of each of these actors; underlines the need for such agreements to be compatible with quality controls; considers that shared responsibility will promote not only employability but also personal development and active citizenship;
25. Calls on the Member States to remove barriers to participation in lifelong learning, particularly age barriers;
26. Urges Member States to agree on a specific target - like that agreed at the Barcelona European Council for research and development - for annual expenditure on lifelong learning and to provide fiscal and other incentives to encourage investment in lifelong learning by employers and individual citizens;
27. Believes that there is a direct link between quality of work and lifelong learning, and therefore calls on the Commission to devise strategies on how lifelong learning, quality of work and the organisation of work can be made mutually supportive;
28. Calls on the Member States to pay particular attention to the creation of lifelong learning programmes for educators at all the various different educational levels;
29. Calls on Member States to draw up National Lifelong Learning Pacts (NLLPs) to be signed by the main stakeholders, with overall investment targets and clear agreements on

the relative distribution of costs between public authorities, enterprises and individual learners;

30. Regrets that most Member States have only few forms of funding re-training for a new occupation or none at all, despite the fact that this is particularly important at times of economic crisis and industrial restructuring; further calls on the Member States to cooperate with the social partners to ensure that all workers are given the right to paid leave in order to participate in skill-enhancing training;
31. Calls on the Commission to ensure that each Member State takes the legal steps necessary to offer and provide access to lifelong learning for all employees or jobseekers;
32. Notes the focus on individual competences and skills in the European social partners' contribution to the Barcelona Summit and points to the need for enterprises to develop as learning organisations where skills and know-how are shared collectively to the benefit of both the enterprise and the workers;
33. Calls on the higher education institutions, in co-operation with the scientific and professional associations, to develop flexible complementary education programmes which make use of the possibilities offered by new technology (remote learning, multimedia, Internet etc.), so that those involved will be able to combine lifelong learning with the demands of their professional and private lives;
34. Believes that 'individual learning accounts' and similar instruments, which combine public expenditure and personal engagement, are an important means of promoting lifelong learning; underlines the role that these could play in advancing equality of educational opportunity; believes, however, where enrolment on courses is to be supported through lifelong learning accounts, these courses must be subject to quality control and accreditation procedures; urges the Commission to gather and disseminate best practice in this area;
35. Calls on the Member States to intensify the exchange of information and experience via 'examples of best practice' and via planned projects in the field of lifelong learning at European level;
36. Stresses the need for better coordination of national policies for training, research and innovation at European level;
37. Welcomes the European Investment Bank i2i initiative which widens the mandate of the EIB to include lending to support education; calls on the Commission and Member States to facilitate EIB lending for lifelong learning;
38. Calls on the Commission and the Council to ensure that the lifelong learning programmes take full account of women's specific needs, emphasising consultation and professional guidance, financial incentives (scholarships, grants, etc.), research into women's professional development, their participation in decision-making processes, equal representation of both genders in the sciences and the new technologies and combating

the gender-based divisions in the employment market;

39. Considers that, in order to combat social exclusion, priority should be given to vulnerable sections of the population who do not have easy access to professional training, such as single parents, immigrant women, women living in rural areas or in poverty; special attention should be paid to increase the number of women in sectors where they are under represented;
40. Calls on the Member States to focus their efforts to ensure that gender mainstreaming policy becomes part of the overall policy to promote lifelong learning;
41. Urges the institutions of the European Union to incorporate the philosophy of lifelong learning in their recruitment, staff-training, promotion and financial policies;
42. Instructs its President to forward this resolution to the Commission and Council, the Member States, the governments of the EEA, EFTA and applicant countries, the Committee of the Regions and the Economic and Social Committee.

EXPLANATORY STATEMENT

BACKGROUND

1. Globalisation of the economy, the increasing importance of information and communication technologies, Europe's rapidly-ageing population - all help to explain why the Lisbon and Stockholm Councils gave high priority to lifelong learning. The Feira European Council concluded that 'Lifelong learning is an essential policy for the development of citizenship, social cohesion and employment': it also called on 'the Member States, the Council and the Commission ... within their areas of competence, to identify coherent strategies and practical measures with a view to fostering lifelong learning for all ...'.

THE COMMISSION COMMUNICATION

2. The Communication takes account of the consultative process launched by the 'Memorandum on Lifelong Learning' in October 2000, as well as of experience of Community programmes such as SOCRATES and the 1996 European Year of Lifelong Learning.

3. Lifelong learning is defined as 'all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective.' The Commission identifies **six 'building blocks' for the development of lifelong learning strategies**:

- a partnership approach between all relevant actors
- insight into the needs of learners and of organisations, communities, wider society and the labour market
- adequate resources, to be allocated in an effective and transparent way
- developing the supply side to enable learning by anyone, anywhere, at any time (facilitating access): the formal sector must recognise and value non-formal and informal learning.
- creating a culture of learning by increasing learning opportunities, raising participation levels and stimulating demand for learning.
- striving for excellence through mechanisms for quality assurance, evaluation and monitoring.

4. These have led the Commission to propose **six 'priorities for action'**

- a comprehensive new European approach to valuing learning: proposals focus on mutual recognition of formal certificates and diplomas and the identification, assessment and recognition of non-formal and informal learning.
- information, guidance and counselling will facilitate access to learning.
- investing time and money in learning: the Lisbon conclusions and the European Employment Strategy call on Member States to raise overall levels of investment in education and training. Fund must be better targeted and ways must be found to increase private investment.
- the development of local learning centres, learning communities, cities and regions, and turning workplaces into learning organisations could bring learning and learners closer together.

- the foundations of lifelong learning must be accessible to all citizens, at all stages of their lives and not just within compulsory education: proposals on the acquisition of basic skills reflect this.
 - innovative pedagogy will address the shift in emphasis from knowledge acquisition to competence development, and the new roles for teachers and learners that this implies.
5. **Some concrete action points** are:
- by the end of 2002, the Commission will introduce a 'portfolio' system, to enable citizens to present their formal and other qualifications anywhere in Europe: this will include the European CV;
 - by the end of 2002, the Commission will set up an Internet portal on learning opportunities, to bring learning opportunities and learners together and make learning more visible;
 - the Commission urges the European Investment Bank to support lifelong learning as part of the "Innovation 2000" initiative. The European Investment Fund could help to locate risk capital funding dedicated to the development of human capital e.g. by supporting small and medium-sized enterprises' access to learning;
 - the deployment of the European Social Fund, the European regional Development Fund (ERDF) and the EQUAL initiative to support lifelong learning;
 - the Commission will grant a European label to firms in order to reward and publicise best lifelong learning practice.
6. **The next steps:** The European institutions, the Member States, the EEA and applicant countries, the social partners, NGOs and international organisations (e.g. the Council of Europe, OECD, UNESCO) all have a role to play. Existing processes, programmes and instruments will further the exchange of good practice and experience and thus the identification of shared problems, ideas and priorities. Specifically:
- the Commission will develop a database on good practice, information and experience concerning lifelong learning at all levels.
 - cooperation will take place through the Follow-up to the Report on the Concrete Objectives of Education and Training Systems and the European Employment Strategy.
 - Socrates, Leonardo da Vinci and Youth will be strengthened.
 - the possibility of mobilising the European Social Fund (ESF) and the ESF Community Initiative EQUAL to support lifelong learning will be examined.
 - performance indicators will measure progress, which will be overseen through existing bodies of experts and a high level group of representatives of Ministries bearing the main responsibility for lifelong learning.

RAPPORTEUR'S COMMENTS

7. **Principles:** In its report on the Memorandum on Lifelong Learning, the Parliament urged that concrete policy measures be based on five principles: democratisation and the principle of equality; individual personality development; the right to lifelong learning; personal responsibility; and a holistic approach to learning. The Parliament should welcome the fact that these principles are reflected in the present Commission Communication.

8. **Defining basic skills:** The Lisbon Council included knowledge of information and communication technologies, foreign languages, science, and entrepreneurship, as well as social skills, among the 'basic skills' citizens need in a knowledge-based society. But there is still no firm agreement about what basic skills are. The Commission and the Member States need to establish a European framework of basic skills. This should pay particular attention to how 'learning to learn' relates to other basic skills; indicate how skill attainment targets can be included in curricula; and underline the right to basic skills as a fundamental right for all.

9. **Valuing all forms of learning:** Promoting lifelong learning implies a holistic approach to learning which recognises and values all forms of learning.

- **Formal learning:** Mutual recognition (and, therefore, greater transparency and comparability) of formal qualifications is the key issue. Given that this debate has been going on for years, the Communication is disappointingly unclear. On the one hand, it calls for the 'development of voluntary minimum quality standards in order to create a stronger basis for mutual trust and recognition of qualifications and competencies': this sounds like a gradual and ad hoc process. On the other hand, it promises the development by the end of 2002 of 'a "portfolio" system which will enable citizens, at all stages of education and training to group together their qualifications and competences and present them'; and, by the end of 2003, of 'a "modular" system for the accumulation of qualifications, allowing citizens to combine education and training from various institutions and countries.' What is the relationship between these two different approaches?
- **Non-formal learning.** By the end of 2002, the Commission promises 'a systematic exchange of experience and good practice'; and, by the end of 2003, 'an inventory of methodologies, systems and standards'. Member States 'will be encouraged to provide the legal framework to implement ... the identification, assessment and recognition of non-formal and informal learning.' Valuing non-formal learning requires a fundamental change of attitude.

10. **Who pays?** The Communication states that 'Overall rates of public and private investment must be raised. Such increases should be based on shared responsibility between government, public authorities, employers, social partners and individual citizens.' This is too vague.

- **Member States?** The Communication says that 'Member States should set national targets to raise overall investment levels in human resources'. The Barcelona European Council set a target for spending on research of 3% of GDP. The Member States need to set a target for expenditure on lifelong learning. It would help if the indicator 'making the best use of resources' were broken down and a clearer distinction made between formal and non-formal learning.
- **Employers?** Employers and trade unions are exhorted to find ways 'to modernise the organisation of work, with a view to increasing investment in lifelong learning and to providing more time for learning.' But, while big companies seem keen to get involved in lifelong learning, small and medium-sized enterprises are much less enthusiastic: they say that they cannot afford to release staff when they only have a few employees. Without legally-entrenched rights to paid time off work (e.g. 35 hours per year for

properly validated training), workers and employees may not have the time to take advantage of new schemes promoting lifelong learning. The Commission also needs to say more about the role of non-governmental organisations in promoting lifelong learning.

- **Individual citizens?** The right to lifelong learning is not a blank cheque. Innovative schemes to promote lifelong learning for which individuals pay, or where the cost is shared, should be supported through, for example, individual learning accounts.
- **A mixed approach?** This is the way forward. But there must be clear agreements setting out how the cost will be shared between the state, employers, and individuals. Strict quality standards are necessary: these must take account of whether a course will promote not only employability but also self-development and active citizenship.

11. Lifelong learning and the Community budget: Support for lifelong learning in the Community budget remains difficult to quantify. In principle, the whole of the B3-1 (education and vocational training) chapter of the Commission budget might be included: in budget 2002, this amounts to some €523 million in commitments appropriations (approximately 0,5% of the Commission budget). The Commission adds an estimate of a further €2 billion per year for the period 2000-2006 from the European Social Fund. The contribution from the Research Framework Programme is not clear, nor is that of the European Investment Bank, the European Regional Development Fund or the EQUAL initiative. Is any 'new', genuinely additional, Community expenditure on lifelong learning planned?

12. Targets, indicators and outcomes: Lifelong learning covers all forms of education and training (formal, non-formal and informal) at all ages. There is, consequently, a danger that what are presented as efforts to promote it might be no more than a re-labelling of current programmes and expenditure. The only way to avoid this is by the establishment of specific targets for lifelong learning; clear and measurable performance indicators; and regular reports on what has been achieved. Particular target groups (early school-leavers, the unskilled, those over 55) have already been identified. Helping to establish clear targets and performance indicators is one of the biggest contributions that the Commission can make to promoting a European area of lifelong learning.

13. Practise what you preach: Finally, many of the shortcomings identified by the Commission in current education and training systems are replicated by the European institutions themselves. Recruitment procedures rest almost exclusively on formal qualifications and written examinations; there is little or no recognition of knowledge and skills acquired in previous employment, let alone in non-formal or informal ways; and staff training is widely regarded by independent observers as quite inadequate. The Commission (and the other European institutions) could underline how seriously they take lifelong learning by practising what they preach.

28 May 2002

OPINION OF THE COMMITTEE ON EMPLOYMENT AND SOCIAL AFFAIRS

for the Committee on Culture, Youth, Education, the Media and Sport

on the Commission Communication on Making a European Area of Lifelong Learning a Reality (COM(2001) 678 - C5-0165/2002 - 2002/2073(COS))

Draftsman (*): Herman Schmid

(*) Hughes procedure

PROCEDURE

The Committee on Employment and Social Affairs appointed Herman Schmid draftsman at its meeting of 12 December 2001.

It considered the draft opinion at its meetings of 19 February 2002, 16 April 2002 and 28 May 2002.

At the last meeting it adopted the following conclusions unanimously.

The following were present for the vote: Theodorus J.J. Bouwman, chairman; Marie-Hélène Gillig, Winfried Menrad and Marie-Thérèse Hermange, vice-chairpersons; Herman Schmid, draftsman; Sylviane H. Ainardi, Jan Andersson, Elspeth Attwooll, María Antonia Avilés Perea (for Carlo Fatuzzo), Regina Bastos, André Brie (for Arlette Laguiller), Ieke van den Burg, Philip Bushill-Matthews, Alejandro Cercas, Luigi Cocilovo, Proinsias De Rossa, Jillian Evans, Ilda Figueiredo, Fiorella Ghilardotti (for Enrico Boselli), Anne-Karin Glase, Koldo Gorostiaga Atxalandabaso, Richard Howitt (for Elisa Maria Damião), Stephen Hughes, Dieter-Lebrecht Koch (for Enrico Ferri), Ioannis Koukiadis (for Harald Ettl), Rodi Kratsa-Tsagaropoulou, Jean Lambert, Elizabeth Lynne, Mario Mantovani, Juan Andrés Naranjo Escobar (for Raffaele Lombardo), Ria G.H.C. Oomen-Ruijten (for Thomas Mann), Manuel Pérez Álvarez, Bartho Pronk, Miet Smet, Helle Thorning-Schmidt, Claude Turmes (for Hélène Flautre), Anne E.M. Van Lancker, Barbara Weiler and Sabine Zissener (for James L.C. Provan).

SHORT JUSTIFICATION

This Communication is part of the follow-up to the Lisbon and Feira European Councils and builds on last year's extensive consultation on the Commission's Memorandum on Lifelong Learning¹. It focuses on six priority areas for action, including at Community level: valuing learning, promoting guidance, raising investment, bringing learning closer to the learner, addressing basic skills and encouraging innovative pedagogies. Implementation is proposed through existing processes and instruments, including the Employment Strategy.

Draftsman's position

The real strength of the notion of "lifelong learning" lies in its comprehensive scope and its emphasis on learning as a cumulative, continuous process. This reflects the realities of the new information society and the general need to upgrade and extend education and training systems. However, policies to make a reality of lifelong learning have to be delimited if the necessary priorities, targets and budgets are to be set. Paradoxically, then, lifelong learning needs to be broken down in order to be built up!

Everybody supports the idea of lifelong learning, not least following the Lisbon Summit which made it an integral part of the shared vision for a competitive and cohesive Europe. Yet levels of spending on education and training in the EU remained about 5% of GDP throughout the period 1995-2000² and many national budgets for 2002 set reduced allocations for this area. This reflects Member States' need to prioritise within tightening budgets but also their ambiguity as to the funding of learning: governments are seeking to shift some of the burden, especially for vocational education and training, on to individuals and employers while, conversely, individuals and enterprises are demanding more from the public authorities.

This problem would best be addressed by National Lifelong Learning Pacts (NLLPs) that set out the responsibilities of the major stakeholders, along with national targets that are binding for all parties. Such pacts would have to be based on realities: only public authorities can bear the cost of initial, general education while, since more of the future labour force must have post-secondary qualifications, public responsibility should extend to universities, polytechnical schools and so on.

The existing arrangements in many Member States, of students meeting living costs in return for free tuition, puts a significant burden on the individual - still more where students also pay for tuition. Learning designed to prepare for specific job tasks or production processes or that is part of work organisation schemes must be employer-financed. Since such provision is vital to workers' on-going employability, it should be dealt with by the social partners, through dialogue, agreements and joint working at enterprise level.

There is a trend in some Member States for individual investment to be related to career planning and the market value of particular qualifications and skills. But educational investment is a risky and very costly personal commitment for most people - which is why

¹ SEC(2000) 1832 of 30.10.2000

² See SEC(2002) 29/2 of 24.1.2002 - supporting document to the Commission's synthesis report to Barcelona.

banks demand a state or employer guarantee for study loans to students from less than wealthy backgrounds.

Individual learning accounts represent a new approach but such schemes can only substantially change the situation where employers are willing to make significant contributions. And such investments entail risks for employers as newly up-skilled workers may get better jobs elsewhere.

Individual competences and qualifications are important, as emphasised by the EU level social partners' contribution to the Barcelona European Council - but education is essentially a social process. Learning organisations create and accumulate common skills and shared capacities which are of the utmost importance for productivity and competitiveness. In this sense, work organisation may have as great an impact on an enterprise's skill base as the recruitment of individual workers with particular competences.

Educational systems tend to exacerbate rather than overcome inequality. Those with a solid basic education are most likely to keep on learning - which is why lifelong learning policies and measures must include efforts to reverse this trend. Indeed, this is our most urgent policy priority. Without considerable support, requiring more than one-off courses or training programmes, people lacking a solid foundation of learning face unacceptably high risks of long-term unemployment. Such groups might include: drop-outs from school; workers with only basic qualifications; those women - and men - with poor initial education whose caring responsibilities require breaks from the labour market; people with disabilities who face particular barriers to learning; immigrants whose qualifications and skills are not recognised; workers with obsolete occupational qualifications; older people who cannot afford to retire...

CONCLUSIONS

The Committee on Employment and Social Affairs calls on the Committee on Culture, Youth, Education, the Media and Sport, as the committee responsible, to incorporate the following points in its motion for a resolution:

Conclusion 1

Points out the contradiction that while all Member States support the idea of lifelong learning, in practice average levels of public expenditure on education and training in the EU are stagnating; calls, therefore, on the Member States to increase investments in human resources;

Conclusion 2

Calls on Member States to draw up National Lifelong Learning Pacts (NLLPs) to be signed by the main stakeholders, with overall investment targets and clear agreements on the relative distribution of costs between public authorities, enterprises and individual learners;

Conclusion 3

Believes, furthermore, that such pacts must acknowledge that public authorities bear the main

burden for general education from pre-school to undergraduate university level and that they are to provide resources for education outside school, especially for adult education; that enterprises should have the responsibility for investment in skills that should benefit their production; and that only specialised provision for professional careers can, at least in part, be financed by the individuals concerned who also bear their own responsibility for their personal commitment to lifelong learning;

Conclusion 4

Commends the proposal that everyone should be entitled to basic skills, including early school leavers via free compensatory learning later in life; this will allow such individuals to acquire the qualifications and skills necessary for them to play an active role in society and to have genuine access to the labour market;

Conclusion 5

Calls on public authorities to develop programmes to facilitate access to and improve the quality of training by developing local learning centres, based in schools and other locations, which can provide guidance to their users, offer training programmes based on learners' requests and strengthen links between the education system and local labour markets;

Conclusion 6

Calls for the competent public authorities and the Commission, in line with the affirmations made in Lisbon and Stockholm, to devise common guidelines for skills plans and validation systems which can be used to facilitate mutual recognition of certificates, diplomas and degrees and to compare the combined efforts of the Member States in the areas of training and skills development;

Conclusion 7

Considers that socially disadvantaged and other excluded groups should be the target for lifelong learning policies because of the difficulties they often face due to poor literacy/numeracy and ICT skills and their alienation from education and training systems; calls for measures to provide incentives and opportunities specifically designed for such groups; at the same time, calls on the further training establishments to cooperate to increase the supply of further training in the Member States;

Conclusion 8

Recognises the wider social value of lifelong learning including improving quality of life, health, responsible citizenship, social inclusion and combating discrimination;

Conclusion 9

Believes that there is a direct link between quality of work and lifelong learning, and therefore calls on the Commission to devise strategies on how lifelong learning, quality of work and the organisation of work can be made mutually supportive;

Conclusion 10

Points out that if a lifelong learning agenda is to be implemented properly, major changes will have to take place in education and training bodies and believes that if learning is to be brought closer to the learner, schools and, in particular, universities will have to seriously consider opening up their facilities and interact much more with local communities and enterprises in the context of economic, employment, scientific and cultural matters;

Conclusion 11

Considers that the issue of applying learning to deal with problems identified in the community should be recognised and that it is not just a question of providing more education courses but rather helping people to learn through their social and economic problems, including employment issues, and believes that in this respect education and training specialists would have to play a role as learning facilitators rather than formal teachers;

Conclusion 12

Stresses that undertakings, as part of their social responsibility, should create the best possible conditions to enable workers to continue to improve their qualifications; considers that every large-scale employer should devise skills plans and validation systems negotiated between the two sides of industry and further specifies that these plans and validation systems should be jointly managed in accordance with collective agreements and national legislation;

Conclusion 13

Notes the focus on individual competences and skills in the European social partners' contribution to the Barcelona Summit and points to the need for enterprises to develop as learning organisations where skills and know-how are shared collectively to the benefit of both the enterprise and the workers;

Conclusion 14

Calls on the Commission, the Member States and the social partners to step up considerably their commitment to the recognition of skills obtained by non-formal or informal training, work experience and occupational training offered by or obtained through work in business or other sectors;

Conclusion 15

Regrets that most Member States have only few forms of funding re-training for a new occupation or none at all, despite the fact that this is particularly important at times of economic crisis and industrial restructuring; further calls on the Member States to cooperate with the social partners to ensure that all workers are given the right to paid leave in order to participate in skill-enhancing training;

Conclusion 16

Calls on the Member States to reform their school and professional training systems in such a way that the trainees also get the qualifications they need in their working life;

Conclusion 17

Considers that special programmes should be devised particularly for older workers who have not acquired ICT skills but possess a wealth of experience, and for women and men who wish to return to work after a family break and are fully trained or possess the necessary educational qualifications;

Conclusion 18

Calls on the Member States to intensify the exchange of information and experience via 'examples of best practice' and via planned projects in the field of lifelong learning at European level;

17 April 2002

OPINION OF THE COMMITTEE ON INDUSTRY, EXTERNAL TRADE, RESEARCH AND ENERGY

for the Committee on Culture, Youth, Education, the Media and Sport

on Making a European Area of Lifelong Learning a Reality
(COM(2001) 678 – C5-0165/2002 – 2002/2073(COS))

Draftsman: Myrsini Zorba

PROCEDURE

The Committee on Industry, External Trade, Research and Energy appointed Myrsini Zorba draftsman at its meeting of 23 January 2002.

It considered the draft opinion at its meetings of 18 March 2002 and 16 April 2002.

At the last meeting it adopted the following conclusions unanimously.

The following were present for the vote: Carlos Westendorp y Cabeza, chairman; Yves Piétrasanta, vice-chairman; Myrsini Zorba, rapporteur; Sir Robert Atkins, María del Pilar Ayuso González (for Jaime Valdivielso de Cué), Luis Berenguer Fuster, Mario Borghezio (for Marco Cappato), Felipe Camisón Asensio (for Werner Langen), Massimo Carraro, Gérard Caudron, Giles Bryan Chichester, Elisa Maria Damião (for Reino Paasilinna), Willy C.E.H. De Clercq, Carlo Fatuzzo (for Guido Bodrato), Concepció Ferrer, Francesco Fiori (for Umberto Scapagnini), Colette Flesch, Christos Folias (for Christian Foldberg Røvsing), Glyn Ford (for Gary Titley), Per Gahrton (for Claude Turmes), Neena Gill (for Harlem Désir), Norbert Glante, Michel Hansenne, Roger Helmer (for Peter Michael Mombaur), Hans Karlsson, Bashir Khanbhai, Peter Liese (for Godelieve Quisthoudt-Rowohl), Rolf Linkohr, Caroline Lucas, Eryl Margaret McNally (for Nuala Ahern, pursuant to Rule 153(2)), Erika Mann, Marjo Matikainen-Kallström, Patricia McKenna, Elizabeth Montfort, Angelika Niebler, Paolo Pastorelli, Elly Plooij-van Gorsel, Samuli Pohjamo (for Nicholas Clegg), John Purvis, Daniela Raschhofer, Imelda Mary Read, Mechtild Rothe, Paul Rübig, Ilka Schröder (for Roseline Vachetta), Konrad K. Schwaiger, Esko Olavi Seppänen, W.G. van Velzen, Alejo Vidal-Quadras Roca, Dominique Vlasto and Olga Zrihen Zaari.

SHORT JUSTIFICATION

In June 2000, the European Council of Feira charged the Commission to draft the communication as a part of the Strategy that EU members and the Commission should define to allow all Europeans access to lifelong learning, i.e. all learning activities, during the whole life of a person, taking place in schools, at workplace or others aiming to improving knowledge and skills.

The communication sets a list of actions to be adopted within the "lifelong learning area": co-operation between the EU and its members, as well as between national ministries and foresees the creation of a high level group of representatives of the ministries responsible for lifelong learning.

The communication identifies six key elements for education and training strategies: partnership between decision makers, education providers and social partners; encouragement of investments; analysis of education contents and their orientation towards NICT; creation of local learning centres, create a "culture of learning", quality controls.

The recognition of qualifications and skills; the enhancement of the European dimension of information, guidance and counselling services; financial instruments to be assembled at EU level with the intervention of the EIB and the EIF, involving also the ERDF and the ESF; the granting of a European quality label will also contribute to promote lifelong learning.

Draftswoman's position

The draftswoman judges positively the communication, but expresses concerns about the situation in the field of education and training in the EU. As a matter of fact, **education and training that define** lifelong learning, should be linked, but **school and job market** do not refer to the same principles. Moreover, a common policy for education does not exist, as education is still a competence of EU member.

The draftswoman stresses these contradictions and points out that they can lead to a limitation of the educational purposes and transform the educational system to a mere passage towards the labour market. She calls attention on the fact that **training cannot replace a poor education; in fact, training can fail because of the very low previous educational level.** The more the basic skills **embrace a large spectrum of issues** - such as history, geography, civic education, natural sciences, literature -**the more we can succeed in creating a solid background on which to build the necessary skills for professional productivity and flexibility.** Initial education is a very important factor in everybody's life and the key to **achieve social, economical and personal goals.** The **risk that only people with strong education benefit of lifelong learning, while people with fewer skills would be marginalised must be avoided.**

Education through training represents an instrument to promote economic potential. Social exclusion is still too large in the EU - in 2000 only 60% of EU citizens aged of between 25 and 60 had complete their secondary studies. The draftswoman asks for a joint effort from the Member States and the EU to provide everybody with quality education as a priority, which will provide a guarantee for lifelong learning. She also underlines the **need to ensure the quality of certified skills acquired through informal education.**

The draftsman thinks that every phase of learning should be covered by lifelong learning, i.e. the primary and secondary school as well as the university and atypical forms of training and education, but with precise respect of the rules and the role that should be intellectual formation, which should be the ground on which to build professional skills.

Open co-ordination amongst EU States in the field of education does not appear as the best answer to the draftsman. Many differences still exist amongst EU members in the field of training and lifelong learning, half of them have set strategies in these fields, the others have not: pure open co-ordination does not offer any guarantee for economic and social cohesion; this latter would suffer from these differences and the gap between EU Members would even become deeper.

The draftsman considers that EU members should make steps to comply with common criteria in the field of their stages of quality education and let them be accessible to everybody. National education systems should be reviewed in this sense, but at the same time structural measures should be adopted to ease these changes.

National governments and social partners should co-operate and conclude agreements concerning goals, tools, content and evaluation methods of lifelong learning to guarantee that the measures taken in this field are really adequate to reach the goals set. The draftsman thinks that both the EU and the national Governments should **encourage enterprises to conclude short-term agreements within their structure**. These agreements should concern the goals to be reached, the content of lifelong learning, the instrument to implement it and the methods to evaluate it and would offer an important indicator of the social role enterprises can play.

The draftsman recognises that Commission's initiatives in the field of certificates and diploma recognition are important, but major steps have to be made in this field.

Finally, she agrees with the priorities set in the Communication and welcomes the promotion of investments, but she thinks the approach should be more concrete. Consequently she asks the Commission to verify how to encourage private investments to analyse the role that EIB and EIF could play in the field of the promotion of lifelong learning and to come up with more concrete proposal in the field of the support to local and regional education centres.

CONCLUSIONS

The Committee on Industry, External Trade, Research and Energy calls on the Committee on Culture, Youth, Education, the Media and Sport, as the committee responsible, to incorporate the following points in its motion for a resolution:

1. Stresses the fact that training and lifelong learning are strictly linked to each other ; therefore calls on Member States to *take* steps in order to comply with common criteria in the field of their stages of quality education and make these stages

accessible to everybody;

2. Is of the opinion that transformation into a knowledge-based society means that access to education and training must be simplified;
3. Points out that training cannot replace a deficient education and hopes that Community social policy on one hand and national education policies on the other can be coordinated to produce more training and more initial education while boosting education and training in those areas where they help narrow the gap between market expectations on the one hand and those of the general public on the other;
4. Notes that differences exist at the national level in the way member States deal with lifelong learning in their education policy and stresses that half of the EU members do not have a relevant strategy or policy in this field;
5. Stresses the need to avoid that only those citizens who already have a strong education can benefit of lifelong learning actions and that by consequence people that do not have the necessary skills to exploit the full potential of lifelong learning risk to be marginalised;
6. Believes that access to the acquisition of basic skills must be facilitated for socially and economically underprivileged persons who currently derive least benefit from educational and training systems;
7. Calls on member States and their national social partners to define together all aspects of lifelong learning and draft a common agreed educational plan concerning goals, actions and evaluation methods;
8. Stresses the need of better coordination of national policies for training, research and innovation at European level;
9. Asks the European Union and the member States to encourage enterprises to adopt internal short-term agreements on the goals to be reached, the tools to implement and the methods to evaluate lifelong learning and considers that such agreements would represent an important indicator on the social role played by each enterprise;
10. Agrees with the Commission objective of promoting investments, but deplores the fact that the steps the Commission suggests are not very concrete and therefore asks the Commission to better explore in which ways private investments have to be encouraged and to come up with concrete proposal as far as the role of local and regional education centres is concerned, as well as about the ways to support them;
11. Calls on the Commission to put forward a programme of financial aid for public, private and joint measures to put on voluntary courses for citizens of all ages along the lines of the 'University of the Third Age' or the 'People's University';

12. Emphasises that knowledge acquired outside the conventional educational system, such as experience of working life or social change, must be seen as part of lifelong learning;
13. Access to skilled, trained and adaptable labour is important for European industry so as not to lose competitiveness vis-à-vis the outside world; education must therefore be dynamic and adapted to social change and the needs of the labour market;
14. Emphasises that lifelong learning makes for increased occupational mobility on the labour market.

21 May 2002

OPINION OF THE COMMITTEE ON WOMEN'S RIGHTS AND EQUAL OPPORTUNITIES

for the Committee on Culture, Youth, Education, the Media and Sport

on the communication from the Commission on Making a European Area of Lifelong Learning a Reality
(COM(2001) 678 – C5-0165/2002 – 2002/2073(COS))

Draftsperson: Anna Karamanou

PROCEDURE

The Committee on Women's Rights and Equal Opportunities appointed Anna Karamanou draftsperson at its meeting of 18 April 2002.

The committee considered the draft opinion at its meeting of 21 May 2002.

At the last meeting it adopted the following conclusions unanimously with 1 abstention.

The following were present for the vote: Anna Karamanou, chairperson and draftsperson; Marianne Eriksson and Jillian Evans, vice-chairpersons; María Antonia Avilés Perea, Regina Bastos, Geneviève Fraisse, Lissy Gröner, Rodi Kratsa-Tsagaropoulou, Astrid Lulling, Thomas Mann, Maria Martens, Emilia Franziska Müller, Christa Prets, María Rodríguez Ramos, Feleknas Uca, Sabine Zissener, Karin Jöns for Fiorella Ghilardotti, Ilda Figueiredo for Armonia Bordes, Olle Schmidt for Lone Dybkjær and Anne E.M. Van Lancker for Hans Karlsson.

CONCLUSIONS

The Committee on Women's Rights and Equal Opportunities calls on the Committee on Culture, Youth, Education, the Media and Sport, as the committee responsible, to incorporate the following points in its motion for a resolution :

- A. Taking into account the European Union's social -political agenda, as set by the Lisbon and Nice European Summits and more specifically its policy of raising women's employment participation to at least 60% in the coming years in the whole Union;
 - B. Whereas Europe's social and economic development will further improve by an increasing rate of women in employment , in order to reach the Council's aim, appropriate supporting measures as well on European as on national level are essential;
 - C. Whereas, despite the improvement in women's level of education and professional qualifications, considerable inequalities can still be observed between men and women in the employment market and in access to lifelong learning, with the result that women proportionally will increasingly end up in lower paid and lower skilled jobs in order to reach the 60% employment participation level;
1. Calls on the Commission and the Council that the lifelong learning programmes to take full account of women's specific needs, emphasising consultation and professional guidance, financial incentives (scholarships, grants, etc.), research into women's professional development, their participation in decision-making processes, equal representation of both genders in the sciences and the new technologies and combating the gender-based divisions in the employment market;
 2. Calls on the higher education institutions, in co-operation with the scientific and professional associations, to develop flexible complementary education programmes which make use of the possibilities offered by new technology (remote learning, multimedia, Internet etc.), so that those involved will be able to combine lifelong learning with the demands of their professional and private lives;
 3. Emphasises that enterprises should play an active role and should encourage the ongoing updating of knowledge and the expansion of professional choices for women, by drawing up appropriate programmes for the adoption of best practices and the development of statistical data;
 4. Considers that, in order to combat social exclusion, priority should be given to vulnerable sections of the population who do not have easy access to professional training, such as single parents, immigrant women, women living in rural areas or in poverty; special attention should be paid to increase the number of women in sectors where they are under represented ;
 5. Calls on the Member States to focus their efforts to ensure that gender mainstreaming policy becomes part of the overall policy to promote lifelong learning.