

## National Lifelong Learning Strategies (NLLS) -Transversal programme

### Key Activity 1: Policy Cooperation and Innovation



## EFELSE - Evaluation Framework for the Evolution of LLL Strategies in Europe

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### STATE-OF-AFFAIRS REPORT GERMANY

#### PART II

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## SUMMARY

This is the second part of the EFELSE “State-of-Affairs Report Germany”, including tangible results from the EFELSE project activities.

It contains a summary of the results from 19 interviews conducted within the frame of the EFELSE project. The results from interviews with policy makers point out existing challenges on structural and political level for the implementation of lifelong learning. The federal system was identified as one of the most challenging factors. Further, the results from interviews with representatives from training providers focus on the individual efforts of these institutions to do their best in providing target-group and demand-oriented learning offers. Given the current structural conditions in Germany the perspectives are rather positive, and it is mainly the reduction of funding opportunities which causes problems for training providers. However, the federal system and public investment in education are not the only important aspects for implementing coherent and comprehensive lifelong learning in Germany.

An analysis of strengths, weaknesses, opportunities, and threats (SWOT) revealed details, showing that a focus needs to be put on the establishment of quality assurance approaches for lifelong learning strategy implementation, on the policy and training level. Furthermore, the intensification of educational marketing and information of learners are important aspects to increase the awareness of lifelong learning and create a learning culture in Germany. It is also important to focus on target group-specific approaches for attracting and training learners, and policy initiatives as well as the strategies of training institutions already focus in this direction.

A list of best practices in the area of lifelong learning in Germany complements the interview results with an overview of numerous lifelong learning activities that have already been started during recent years.

An online forum for discussing issues of adult education and continuing education from the perspective of the EFELSE evaluation parameters has been set up. Policy makers and representatives from training institutions were invited to participate in this forum. This report reflects on the low active participation of these people in the forum and sees it in the context of the general low online networking culture in the field of lifelong learning in Germany.

Finally, the EFELSE project has developed a framework for the evaluation of implementing the European lifelong learning strategy in a country. A practical tool for policy makers and training providers has been produced (EFELSE Tool; see <http://efelse.iacm.forth.gr>). In the two EFELSE reports, the tool has been applied for assessing the LLL strategy in Germany. This includes an analysis of objectives, benchmarks, opportunities and threats of the EFELSE evaluation parameters (see “State-of-Affairs Report Germany - Part I”, and in this second part of the EFELSE report, a SWOT analysis of related interviews (see above) was performed, and the current status of the lifelong learning strategy implementation was visualised by marking the objectives, benchmarks, indicators and policies in traffic light colours, showing that Germany has strengths on the comprehensiveness level and need for action with regard to coherence of lifelong learning.

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## 1. EFELSE Interviews

The University of the Bundeswehr München has conducted several interviews within the frame of the EFELSE project. The interview partners were policy makers and education providers in the field of lifelong learning in Germany. The results from the interviews of both groups are presented according to the six lifelong learning parameters "demand for learning", "investment in continuing education", "accessibility to learning opportunities" combined with "creating a learning culture", "partnership working" and "quality control and indicators" which have already been introduced in the "State-of-Affairs Report Germany - PART I"<sup>1</sup>. All interviews have been recorded and transcribed, and afterwards been coded with a scheme that allowed the differentiation of the interviewees' replies by the six lifelong learning parameters.

### *Interviews with Policy Makers.*

The University of the Bundeswehr München interviewed policy makers in the field of lifelong learning and continuing education all over Germany. About 20 possible interview partners were identified and contacted by mail; the letter included information on the EFELSE project as well as a request for participation in the interview. Finally, 10 interviews have been conducted within the timeframe of the project: four experts were from institutions and ministries on national and federal level. Additionally, on Länder level four education and social policy spokeswomen and spokesmen from several parties and two representatives from ministries participated in the interview. Five interviews were conducted face-to-face; the other five interviews were conducted via telephone. In the following, a summary of the interview results is provided. The summary is a structured compilation of the main statements provided by the interview participants.

### **Demand for Learning**

The demand for learning of a country needs to be considered on the level of the (potential) learners, the labour market and society, and the learning facilitators. From the interviews with education policy makers in Germany, the following needs could be identified for these three groups.

*(Potential) Learner Needs.* First of all, it is considered very important to increase the demand for learning by educational marketing and raising the awareness for the importance of lifelong learning. Individuals need to be aware of the win-win-situation that result from their participation in lifelong learning: vocational qualifications and general education of individuals provide advantages for the learners and at the same time high qualified learners can contribute to the good of society. Continuing education, targeted to the specific needs of individual learners, is important for reducing the unemployment rate of low educated people, can result in networking contacts for participants, personal improvements in terms of income, social inclusion, and active citizenship, supports competence development (e.g. competence to follow a healthy and sustainable lifestyle, personal skills, language competences), and adapting and preserving competences according to job market needs.

An example of meeting the demand for learning on the individual learner level are the standardized integration courses for migrants offered on federal level and organised by BAMF. The integration courses are subject to legal regulation, e.g. non-participation can have legal consequences for the process of becoming resident in Germany; however participation is incentivised by the possibility to accelerate the process of naturalization in Germany, and it is required for the establishment of business. Special offers for subgroups with special learning needs are offered, e.g. for women with migration background.

*Labour Market & Society Needs.* The German training system has a focus on professionalised and specialised vocational education on an initial level, and thus the need for formal continuing education is rather low, as compared to other countries such as the UK or France. However, the aim of continuing education is to answer the special demand for qualified workers in single branches. Therefore, cooperation of all stakeholders (e.g. trade groups, industry associations, unions) is required. In some cases, employers do not always offer jobs for highly qualified people because of the related costs, although in general an increasing demand for people with

<sup>1</sup> The report can be downloaded from the EFELSE website at <http://efelse.iacm.forth.gr>

high qualifications is observed. For some people however, this might result in a dilemma: remaining low-educated and not participating in continuing education might appear more attractive to these people than having a high qualification and being unemployed. However, this would be a short-term perspective, and the current demographical development increases the importance of continuing education, especially of older workers and low-educated people. To meet the increasing demand for high-qualified people on the labour market it is essential to use the potential of these people in times with decreasing workforce.

In Germany, several measures are implemented with the aim to increase the participation of people in vocational continuing education and in consequence improve their employability. In the context of active labour market policies (e.g. Hartz reforms), it has been proved that long-time training measures (instead of short-time measures) initiated by the Federal Employment Agency have a better long-time effect with regard to labour market integration of participants. Still, public money is mainly spent on rather ineffective short-time measures. As a consequence of the economic crisis, policies were introduced which aimed at avoiding unemployment, e.g. facilitating the participation of employees in continuing education during short-time work. However, the actual demand for continuing education during short-time work was below the expected level and differed between social classes. In many cases, short-time work was rather used by employees for private purposes than for continuing vocational education, and it is not clear if the continuing education that took part during short-time work was planned anyway, or if companies just took the chance to receive funding from the Federal Employment Agency.

*Learning Facilitators.* Teachers (at school level) do not have enough time resources for participation in regular continuing education courses. Other forms of learning are needed to support continuing education of teachers, e.g. informal learning processes. It was suggested that teachers would need to know more about the perspectives of their students, e.g. by participating in an internship in a company together with the students, or by writing tests for students developed by other teachers. Schools should have a long-term and overarching focus on continuing education of teachers and thus support the coherent development of the educational system.

## Investment in Continuing Education

Continuing education in Germany is funded by different sources. Some examples were named during the interviews, e.g. on national level the integration courses organised by the BAMF had a financial backing of 174 mill € in 2009, and participants only had to contribute little money if they could afford it; the Educational Savings Plan provides financing of adult education on demand. It has a focus on persons with lower income; on Länder level e.g. in Bavaria, vocational continuing education is supported from two main funds: ESF-funds and Labour Market Fund (Arbeitsmarktfond).

However, funding schemes are subject to certain constraints. It was mentioned that funds are quite small in general. The main cash-flow still follows the main sectors of the education system. Existing funding procedures cannot be changed easily and adapted to new structures, and exceptions are not permitted. For example, in the frame of the ESF funding schemes, education providers are responsible for recording the spending of ESF money (up to 2025) and are held accountable for the funds. This is laborious, bureaucratic and does not make sense in either case. Furthermore, the Education Savings Plan has a focus on people with lower income, but still these people need to have enough money that can be saved each month for continuing education; and offsetting against tax liability is mainly advantageous for people with higher income.

In theory, the education needed by the economic system could be financed by the economic system; but employees often have to pay for it, e.g. fees, time resources, work completed as part of vocational training. Employers pay continuing education costs only partially, and with certain requirements that need to be fulfilled, e.g. employees have to agree to stay in the company or invest their time for participation in the courses. In context of this situation, several programmes exist to motivate employers for investing in continuing education, e.g. with the Bildungsscheck (education cheque), offered in North Rhine-Westphalia individuals can receive up to 50% funding of vocational continuing education (up to 500€).

Continuing education providers might need funding also. Currently, small providers have serious problems due to reduced funds (e.g. Hartz-Reforms, or weak continuing education lobby in the Länder as compared to the lobbies for school and higher education). Thus, financing and long-term planning of training provision might become more complicated. As a consequence, the employment conditions for staff in institutions that

suffer from this become uncertain. For example, the Federal Employment Agency provides funding by so called “education vouchers”; however, as a consequence of the Hartz-Reforms the funding can be received mainly by accredited training institutions, which offer short and effective measures (=labour market integration rate of participants after the training). Since 2005, especially small providers had to withdraw from this market because of the accreditation costs and impossibility of long-term planning.

Several funding sources and strategies for financing LLL and adult education were suggested by the interviewees, focusing on public funding and less on individual’s contributions, e.g. LLL should be financed and realized with subsidies and public funds following SGB XII, provided by the Federal Employment Agency, the Federal Government, and the Länder; employment agencies should be provided with regional budgets to support their primary business. It was mentioned, that institutionalisation and budget management are important for linking lifelong learning (non-formal, informal) to the formal education system (e.g. vocational education, higher education).

## **Accessibility to Learning Opportunities & Creating a Learning Culture**

*Awareness raising.* One major concern with regard to LLL in Germany is a lack of awareness of the necessity of school education, general continuing education, and LLL. Awareness raising for adult education and LLL is required on learner and policy level. A clear strategy needs to be communicated on policy level; but responsibility and engagement of individual learners is also required. The Federal Government should support publicity and promotion of LLL. With public campaigns for continuing education it is possible to inform about possibilities of continuing education independently from formal barriers and reach e. g. older workers and semi-skilled persons. Furthermore, an incentive system should target especially lower-skilled people to support the development of a positive attitude towards continuing education. Additionally, young people need to experience the necessity of continuing education at an early stage during their lives, e.g. by participating in internships during school time which could support the understanding that knowledge acquired during school does not provide all competences needed for working life. The self-responsible use of books and computers for learning should also be introduced at school already; informal learning should be recognised and learning to learn competences need to be developed. An ideal solution was suggested by one interviewee, which would be the establishment of independent, regional LLL counselling centres, financed from public budget. These centres should offer counselling on long-term education planning for companies (esp. SME), individuals, and institutions. Additionally, the centres should include training infrastructures for rent to be used by small providers which often cannot afford own rooms.

*LLL policies and strategy.* The existing LLL strategy (BLK, 2004) formed a common basis for LLL activities, especially for the „Learning Regions“ programme ([www.lernende-regionen.info](http://www.lernende-regionen.info)), but it is not specifically focused on tangible implementation activities. Therefore, the Federal Governments’ concepts of LLL (BMBF, 2008b) is aligned to concrete implementation of LLL (and less to strategic planning), and the Qualification Initiative (Bundesregierung, 2008) is comprehensive with regard to early childhood education, career planning, adult education, continuing education, etc.

However, the implementation of the LLL strategy in Germany has not yet been completed. In some Länder, the LLL strategy paper (BLK, 2004) has not been subject of debate and has not been advanced since its publishing in 2004, and there is no specified LLL implementation strategy in the Länder. LLL is no priority of the Standing Conference of the Ministers of Education and Cultural Affairs. Challenges arise from a lack of communication regarding the importance of LLL and policy people often do not know the specific conditions in the states. Often, LLL is only a buzzword in policy making, without strategic coherence, e.g. activities of the Federal Employment Agency aim at reducing unemployment rates by providing funding for continuing education, but links to other parts of the education system are not well developed (e.g. prevention of unemployment through initiatives in schools). Furthermore, education policy does not consider educational biographies beyond the age of 16 years, and thus policy focus on the formal education system mainly. LLL is not considered as equal to school education, it has a lower status. Also, the BMBF and the states (e.g. NRW) have no specific focus on non-formal and informal learning processes (as mentioned in the EQF), and it seems that it will not become a focus in future.

Educational policy implementation (and related budgeting) is often not based on educational policy considerations, but on other policies. Continuing education needs to struggle for financial support and in

consequence the situation of training providers is difficult (e.g. with regard to the quality of the offers, and the employment situation of the staff). Thus, a low demand for continuing education and no possibility for cost-covering training provision will cause providers to break up especially small providers.

Participation in BAMF integration courses is regulated by legal guidelines (e.g. requirement for people with migration background who want to get the German citizenship). It is obligatory for the majority of participants, but there are also people with migration background who have lived in Germany for a long time and who participate on a voluntary basis with the aim of developing target group-specific competences (e.g. parent education, women specific offers)

*Continuing education structures.* A major problem of the continuing education market in Germany is its complexity and intransparency about existing offers; e.g. the Federal Employment Agency does not have a complete overview about existing offers and there are no exact numbers available about the existing continuing education providers. Due to the complexity of adult education structures a capacious need for counselling exist among potential learners, and low threshold-projects are needed for increased transparency in all education sectors. The offers should be better structured and less difficult to reach, and widely promoted in public.

The German education system is very much based on formal qualifications which are related to each other. People in Germany have established related mental representation of jobs and professions, e.g. apprenticeship is the basis for qualified jobs, and other options of gaining competences are hardly important. In this respect, the recognition and accreditation of non-formal and informal learning needs to be advanced, including the recognition of partial qualifications.

*EQF/NQF.* The debate about the European and National Qualification Frameworks is likely to continue for some more time, because of the great differences in the European education systems. Furthermore, it will continue with regard to the implementation of the German Qualification Framework, because at the current status, the framework structure does not really fit the German education system: its focus is on formal qualifications instead of actual professional activities as well as pathways and processes that lead to it. For example, formal professional qualifications can hardly be compared; e. g. a German Meister has a level of professional knowledge like the bachelor graduate, but is not recognised as equal qualification. Furthermore, there is a lack of awareness in Germany: qualification is not the end but the beginning of a LLL process, aiming at continuous professional development.

*Addressing Target Groups.* In general, all people need to participate in lifelong learning, no matter what existing educational level they have. However, it was pointed out that certain target groups (e.g. semi-skilled and older employees, people with migration background, handicapped people) need special attention and should be encouraged in a target-group specific way (e.g. low-threshold approaches, counselling offers, less formal/not school-like education offers). This is especially important, as in some Länder (e.g. NRW) the funding for continuing education of socially deprived groups was reduced (e.g. after a government change) and furthermore, existing funding opportunities are subject to certain limitations (e.g. the economic or employment status is relevant for receiving funding; funding according to the Education Savings Plan is only relevant for people with a high enough income that allows to save money).

Current Educational policy supports social selection; the Mathew-Effect occurs with regard to funding of continuing education. An example is the education vouchers issues by the Federal Employment Agency. A study shows that education vouchers are given less often to people from groups with already low educational achievement, and these people additionally make less often use of the voucher. People with vocational qualification receive education vouchers more often than people without vocational qualification, with health problems, in rural areas, or with migration background. Again, if these groups receive a voucher, they do not use it, mainly because of not knowing where they can find continuing education offers, or because of a lack of awareness on the usefulness of continuing education. The validity of education vouchers is limited in time and learners have to find a training offer within 3 months; however, the Federal Employment Agency is not allowed to offer support and counselling on existing offers. Additionally, some training providers do not accept participant with low chances on the job market, because providers who get financed from education vouchers have to guarantee 70% job market integration after training. In consequence, providers specialise on specific groups, e.g. Aussiedler (ethnic German immigrant to Germany) who are generally well educated, but their qualification is not recognised in Germany: they have good chances on the employment market.



Furthermore, education vouchers cover the training costs, but often a lack of additional support would be needed for people from specific target groups (e.g. social-pedagogical support). Despite these challenges about 85% of vouchers are used.

Another target group who needs increased awareness for the necessity of continuing education are employers. Companies have responsibility for LLL implementation, however in general the employers' focus on LLL is too weak, especially in SMEs. Limited time and financial resources prevent employers from providing or acquiring continuing education for their staff. Often, employers compare the profit of continuing education with the profit of not sending an employee to training (e.g. the work s/he could do during the same time). This is a short-term perspective and not based on strategic planning. The acceptance of continuing education and motivation of employers (and also employees) is often too low and a win-win-situation not seen. More specific programmes (e.g. WEGEBAU) are needed to support the continuing education participation of SMEs, and the possibilities of new structures (e.g. learning cooperation and networks of SMEs) need to be taken into consideration.

## Partnership Working

As a consequence of the Federalism in Germany responsibilities differ within the education system and sectors. This causes confusion, e.g. the Länder have sovereignty in adult education issues, continuing education provided by the Federal Employment Agency is subject to regulations by the Federation but is not linked to Länder programmes, and companies take care for in-company vocational education and training. Also, within the Länder responsibilities are not clear, e.g. in NRW different ministries are responsible for continuing education in parallel, they put a different focus on it, and existing LLL modules in NRW are not linked to each other. The Federalism hinders coherent implementation of LLL strategies due to the sovereignty of the Länder in decision making and restricted cooperation structures between the Federation and the Länder. LLL strategies suggestions provided by the EU are perceived as intrusions and rather not implemented because of an often slow process of finding consensus between the Federation and the Länder.

The implementation of LLL objectives provided on national level would require a strategy and also responsibility of communicating the status of implementation among the states and the Federal Government. However, cooperation is not always easy, especially prior to election periods, institutions compete against each other and block cooperative approaches. Implementation of LLL only works if all stakeholders are included in the process, e. g. different unions and ministries in Bavaria cooperate in a "working committee" (e.g. VBW, IHK, DGB, BA, ministries of education/economy/social affairs, etc.). The focus is mainly on joint meetings, events, knowledge exchange, and less on legislative activities. Regular exchange is necessary and must not be limited to special events (e.g. conferences).

The Federalism also leads to restricted dialogues between ministries and training providers: the focus is mainly on financing LLL, and each of the Länder has its own focus on and funding structures for continuing education. Debates on LLL often create oppositions and denials.

In general, responsibilities need to be clarified and a common understanding needs to be found on Länder level first. Initiatives need to be started by the Bund and the integration of existing programmes is necessary because the Länder have divergent interests. However, a problem is the lack of information on existing programmes on EU level, as well as on Federal and Länder level which results from differing responsibilities. Management and guidance by policies is necessary to ensure cooperation across different education areas with differently distributed responsibilities (e.g. primary education, general education, higher education); and cross-party supported initiatives can make continuing education independent from "political exhibition fights" ("politische Schaukämpfe").

## Quality Control and Indicators

*Reporting, Statistics and Indicators.* Several reports in Germany monitor the continuing education activities of the German population (although the focus is mainly on vocational continuing education instead of lifelong learning). These statistics provide information e.g. on the number of offers, on course types (such as distance learning offers), on participation rates by subject and target group. The problem with these data is that it considers mainly recognised and accredited formal offers. The actual number of offers and participation rates differs within the reported data, because in-company offers and trainings provided by companies for their

employees and customers are not taken into account (e.g. informal learning on the job, product trainings, participation in conferences, software training provided by skilled employees to their colleagues.). It is likely that similar differences can be found in other European countries, and that there are also differences between the German Länder in this respect.

*Evaluation Tool.* An evaluation tool for the evaluation of lifelong learning in Germany would need to compare differing LLL structures and offers provided in the Länder on the basis of comparable conditions. The following indicators were suggested for the evaluation and monitoring of continuing education: low-threshold offers, accessibility; appropriate, technical, financial and social compatibility of offers; differentiated participation rates; cost-benefit ratio of participation, the benefit/profit for participants; appreciation of continuing education by companies; perceived and existing challenges; positioning and difficulties of continuing education providers (e.g. demand for training, financing, cooperation with companies; opinion of providers and participants); networking of SMEs on behalf of continuing education issues. It is important to determine a short-term and long-term perspective of indicators.

For the purpose of management by benchmarks it is essential to formulate obligatory benchmarks which are specific to a country context. Existing national benchmarks (e.g. participation rates) are often too unspecific, e.g. not focused on Länder level, not valid for informal learning. Furthermore, the EU benchmarks set unrealistic objectives and are non-binding. In consequence, they do not show the intended effect on policy making and cause indifference or even disinterest.

*Quality Management.* The Lifelong Learning Strategy paper of Germany (BLK, 2004) does not consider overall quality management strategies and aspects of assessing the LLL strategy implementation. On the level of specific LLL programmes evaluation is mostly implemented, e.g. in the Learning Regions programme ([www.lernende-regionen.info](http://www.lernende-regionen.info)) the evaluation process was revised and improved after in its second phase.

With regard to Distance Learning, the quality of offers is regulated by the Distance Learning Protection Act, and providers need to get certified by the Zentralstelle für Fernunterricht (ZFU).

The provision and implementation of the integration courses organised by BAMF is regulated by law, e.g. with regard to its contents and extent. Every part of the integration course programme is particularly monitored: accreditation of providers, and the regular participation of learners in the courses and exams. The BAMF research department conducts a long-term study (Integrationpanel) with participants at the beginning and after completion of the course. It aims at quality improvement of the courses and monitoring of the effective integration of participants into the German society, measured by e.g. existing contact to German people, participation in German associations, etc.

There is a lack of specified quality standards for trainings offered on the continuing education market in Germany. Furthermore, the uncertain employment conditions of continuing education trainers (e.g. fixed term contracts) are reflected in the quality of training offers. Market processes can contribute to higher quality of training provision, but often a good market position is a consequence of successful marketing and not always a consequence of high quality training. In Germany, providers are mainly self-responsible for the assessment and evaluation of training offers and related quality assurance and certification. Still, changes suggested by evaluation results are not always implemented because it would require extensive re-structuring of existing offers (evaluation for the purpose of evaluation). The establishment of institutes for quality assurance in education on national level would require agreement between Bund and Länder on the necessity of overarching quality assurance measures.

## ***Interviews with Representatives from Training Institutions***

The University of the Bundeswehr München interviewed representatives from training institutions in the field of lifelong learning and continuing education all over Germany. Potential interview partners were identified and contacted by telephone; upon agreement of participation they received information on the EFELSE project and a questionnaire via eMail. Eventually, 9 people took part in the interview (2 from private institutions, 7 from public institutions). The interviews were conducted either face-to-face or on the telephone. This chapter provides a summary of the interview results oriented towards exploring the six lifelong learning parameters.

### **Demand for Learning**

The interviews with representatives of practice institutions in Germany provided information about learning needs on the level of the (potential) learners primarily, taking into account the composition of target groups as well as demanded and necessary course contents. The identified learning needs are discussed in this section.

The target group of practice institutions is much more diverse today than they have been in the past. While it used to be comprised mostly of employed males, today it is quite heterogeneous regarding age, gender, and social class. It includes people seeking for employment as well as young professionals who want to improve their chances in the international labour market. Most interviewees indicated a focus on demand oriented trainings according to the respective dominant target groups. Also, individual consultation and examination is offered to participants to ensure that appropriate courses can be offered to each individual. The topics of these demand-oriented trainings are as diverse as the participating people: there are - to name a few - various vocational qualification courses, courses for persons planning to return to work, and computer education seminars for seniors. Topics in high demand involve political knowledge and ethics as well as factual knowledge e.g. on management rhetoric. Since the demand for economic seminars has been on the rise especially during the last year, the number of courses on related topics is increasing. However, this progress is rather slow because more funding and full-time personnel are needed to meet participants' demands even better and in time. It is the strategy of at least one interviewee's institution to re-assess the demand for seminar topics every four years and adjust course offers accordingly.

A comprehensive review of lifelong learning needs reveals a high demand for blended learning opportunities among younger learners, due to varying lifestyles and living arrangements. However, older participants who have not grown up using a computer and put special emphasis on exchanging ideas in personal contact are often not comfortable with e-learning courses. The needs of both groups are met by practice institutions, since most of the interviewees reported use of e-learning facilities, mostly supplementing on-site seminars, but sometimes standing on their own. One interviewee feels that lifelong learning opportunities are especially beneficial to older people since learning can give life in retirement additional meaning.

All (potential) learners, diverse as they may be, are equally affected by the current changes in working conditions (e.g. diversity of employment situation, lack of skilled professionals). These changes are one of the greatest opportunities for learners today, according to several of the interviewees. The general demand for learning, which has not been especially high in Germany firstly, now is increasing due to the expected lack of skilled workers and the increasing threat of unemployment. The rapid development of new technologies also contributes to the rising demand for learning. Also, task complexity is elevated. In consequence a higher demand of management skills can be observed, and one interviewee feels that it is currently not met by practice institutions. Several practice institutions offer special seminars to companies on request only, and in this context it is partly the firms' responsibility to ensure appropriate training for their employees by making suitable arrangements with training providers..

Another important issue regarding the demand for learning is the structure and form of course offers. Since especially younger learners request "entertainment" factors and display a more limited attention span, there is a distinct tendency toward short educational units – the withdrawal rate increases noticeably in courses longer than 12 months. Therefore, long-time trainings required to deepen the understanding of course contents need to be designed in a way that will motivate prospective learners to participate. This is obvious to many of the interviewees and can be achieved by implementing new course types, cooperative seminars with companies or

by combining learning with experiences, e.g. guided tours of historical sites related to the course topic. However, a lack of motivation of participants is not the only obstacle in long-time courses: since the economic crisis seems to prevent long-term education planning in firms and funding of participation in seminars abroad a more modularized approach to further education is taken e.g. by booking shorter courses. Merely one interviewee felt a trend in the opposite direction, toward long lasting courses.

## Investment in Continuing Education

The financing schemes of the private and public institutions in this study varied. Most interviewees reported access to more than one funding source, while some are exclusively reliant on participants' fees. However, even in those institutions that receive public, independent or federal funding, participants' fees usually contribute to the upkeep of the operative processes and participants pay the travel costs. Many interviewees gave account of intermittent funding of projects provided by companies or municipal institutions. Participants from deprived groups are usually permitted to pay in instalments or receive considerable discounts. In many cases the participants fees are also covered by their company, a union or a federal agency. The education vouchers of the Federal Employment Agency are seen by one respondent as the best practice for participants to get education funding. Having several funding sources, especially federal funds was considered by some of the interviewees as a best practice for ensuring sufficient funding; however, it was also noted by several respondents that federal funding has decreased dramatically over the past 30 years. This can pose a considerable problem, if the demand for learning declines as well. In this case, participation fees would vanish from the financial resource menu as well, and leave practice institutions with insufficient sources for course provision. Although the demand for learning seems to be stable at the moment, people are hardly aware of the current challenges of the working life and the related need for lifelong learning. Potential learners want to learn more in less time with less effort and "education discounters" are seemingly meeting this demand. However, since there is ever less funding for qualified trainers, this "discount education" cannot provide the quality level of lifelong learning that is needed to prepare people for the challenges of the working world. One of these challenges is the fact that the age of retirement has been elevated to 67. Education policy makers are even less aware of this fact, it seems: re-education is not paid for people beyond the age of 50 years.

For most practice institutions the major amount of financial resources is allotted to employees and rent of training facilities, followed by cost for external trainers (compensation and expenses), upkeep of organisational processes, and training material. The employees' jobs of one respondent's organisation are safe for the legislative period of four years since that is the time-span after which courses are redesigned in this institution. Course length varies from weekend seminars up to three year re-education programmes, which, of course, affects the cost of the courses as well. Maximum course prizes are fixed by directives of some certification agencies, e.g. if training providers receive course funding by the Federal Employment Agency or want to accept education vouchers, the accreditation according to the *Anerkennungs- und Zulassungsverordnung Weiterbildung (AZWV; www.azwv.de)* regulates course prizes. One interviewee indicated that 40% of their financial resources were utilized towards developing new courses.

## Accessibility to Learning Opportunities & Creating a Learning Culture

As far as the *creation of a learning culture* is concerned, many of the respondents' organisations rely on providing individual counselling on education as well as functional counselling by the institutions or cooperation partners. Individual organisations also provide counselling by telephone or ongoing counselling after the completion of the programme, free of charge. Another measure often followed by the training institutions are the organisation of information events or, in one case, extensive course catalogues. One respondent, however, revealed that there is no actual contact with participants beforehand and counselling is only available upon entering the programme. Another interviewee pointed out that there is a legal barrier preventing some forms of consultation, e.g. consultation on employment law is considered the attorneys' domain and offering it would therefore pose a violation of the non-competition clause. The overall learning culture in Germany is promoted by education laws of the individual *Länder* as well as EU mobility programmes. Also, in some German *Länder*, there are educational laws guaranteeing employees accessibility to further education programmes, e.g. by granting educational leave. Due to the economic crisis, however, companies sometimes seem to keep their employees from taking advantage of such further education possibilities because they cannot afford people off work.

Courses at most of the interviewees' institutions are well *accessible to everyone*. As stated above there are considerable discounts as well as payment in instalments offered to those who need them, a blended learning approach is taken by many institutions, and there are special interest courses offered. Some institutions, however, do not offer special courses for people outside of their very specific target groups, and some offer on-site seminars only. There is a high proportion of women in the courses of almost every consulted practice institution. One interviewee highlighted the fact that all their facilities are barrier free. Individual institutions take special marketing measures to attract people who had bad experiences with the educational system and approach potential learners in their lived-in world and social context. While demand for learning is usually linked to people with already high levels of education, one interviewee reported that people with a lower education level are specifically attracted to their institution. Word-of-mouth and approaching target groups on-site are also viable marketing measures for several institutions. One interviewee suggested that a tangible overview of the further education offered regionally would be beneficial to strengthening the relationship between and also the public awareness of formal and non-formal education in the country.

Since participants specifically demand *certificates*, there is a wide array of certificates participants can obtain from the consulted practice institutions. They include Chamber of Industry and Commerce (IHK, Industrie- und Handelskammer) certificates, several graduate certificates such as Abitur (higher education entrance qualification), and European accredited certificates (e.g. Cambridge certificate). One institution hands out its own certificate, and at another one, the European Computer License can be obtained. Although most consulted institutions do hand out certificates, there are also obstacles, e.g. in some cases the responsibilities for awarding certificates are not clear with regard to the federal level and level of the Länder, and sometimes funding bodies do explicitly restrict the provision of certificates.

As far as *further education for trainers* is concerned, most practice institutions are aware that trainers are a target group for LLL as well. Therefore, they offer special educational units for trainers such as didactics, media literacy, and rhetoric, and employees utilize the possibility of education leave. Learning materials are reviewed before distribution and in one case even re-assessed every three years, thus contributing to the institution's overall quality management. One interviewee referred to a problem other organizations may easily face as well: in-house trainers are often too busy with day-to-day business, so their own further education is cut short. Some respondents revealed to have no educational measures for trainers implemented. There is a voluntary, comprehensive further education program for trainers available at several Bavarian universities.

## Partnership Working

The value of collaborating with institutions outside the field of LLL is obvious to most interviewees as most of them reported a plenitude of cooperation partners. The Chamber of Industry and Commerce (IHK;) was named by many, as were schools and companies. Other collaboration partners include the association of health insurance companies, European associations, business schools and universities, social institutes and churches, municipal institutions, and federal ministries. One training institution is currently planning to collaborate with a certified project manager. Individual institutions have up to 100 cooperation partners and the collaboration activities range from the provision of guest speakers, to the collaboration in projects and course design. Only one representative of a practice institution indicated that there were no actual networks but merely temporary partnerships. A democratic, trustful approach was seen as the best practice for ensuring a successful and mutually rewarding collaborative effort.

Many interviewees reported significant advantages for participants resulting from these partnerships. For example, cooperation with companies may supplement the training institutions' scientific approach with a more practical view of the subject matter, thus providing learners with a more comprehensive set of tools to be utilized in the working world. Also, such collaborations may result in the offer of a double degree learners can obtain, e.g. one institution cooperates with a Fachhochschule (university of applied sciences) for the benefit of its participants. Another institution profits from partnership by taking part in the "Arbeitsgemeinschaft der Träger der Erwachsenenbildung in Bayern" (working group of adult education providers in Bavaria), aiming at making further education the fourth pillar of the Bavarian education system.

## Quality Control and Indicators

LLL programs, like any other (further) education efforts, require some form of evaluation in order to ensure that the often very expensive trainings not only satisfy learners but also improve the personal and professional development of the participants. Quality control, therefore, is a big issue for most of the consulted training institutions. Many interviewees emphasized the clearly defined quality management processes, often according to ISO 9001 or otherwise certified. Evaluation tools are often comprised of participant satisfaction questionnaires during and after each course, sometimes supplemented by a review of the training by the trainer and participants. Several interviewees indicated that the overall educational success is assessed every year. Institutions which train unemployed people on behalf of the Federal Employment Agency have to evaluate the labour market integration quota (i.e. the employment status of former participants) semi-annually. Individual respondents feel the need for a more comprehensive quality control, especially regarding the way in which more innovative training approaches could be implemented in the courses offered. Some respondents indicated that they have a plan for improving evaluation procedures/measures and quality management processes. The MBA program of one consulted institution is currently in the process of accreditation. In individual institutions, however, no further education for trainers and no proper evaluation measures are implemented. One institution keeps quality control mostly on an organisational level (e.g. facilities, application procedures) and less on the level of course and content quality.

## 2. SWOT Analysis of Interviews

The interviews with policy makers and training providers in the area of lifelong learning and continuing education aimed at identifying positive and challenging aspects of the lifelong learning strategy implementation in Germany. The policy makers focused their answers mainly on weak points and challenges related to the lifelong learning strategy implementation in Germany, as well as on suggestions for its improvement. The responses of representatives from training institutions however rather pointed to strengths of their daily practice in implementing lifelong learning. This can be to some extent attributed to the differing interview guidelines for both groups of interviewees; however it can also be seen as indicator of the current structural conditions: On policy level, certain obstacles prevent the coherent and comprehensive lifelong learning strategy implementation; however, training providers do their best to come to practicable solutions during everyday business.

The identification of positive and challenging aspects of the lifelong learning strategy implementation in Germany was performed on the basis of a SWOT analysis. In general, this approach aims at the identification of strengths, weaknesses, opportunities, and threats (SWOT) of a given field of interest. According to the Federal Ministry of Internal Affairs (the SWOT analysis is a strategic management tool which allows the identification of strengths and weaknesses of an organisation (internal view) and of chances and threats of its environment (external view; see BMI, 2009; Lee & Ko, 2000; Lombriser & Abplanalp, 1998 ). The aim is the identification of solutions and strategies which are necessary for the achievement of the organisation's goals. The SWOT analysis can also be used for the evaluation of specific organisational projects. In the context of the EFELSE project the SWOT approach has been used for evaluating the strengths, weaknesses, opportunities and threats of implementing the lifelong learning strategy in Germany (see table 2.1). The result is a more differentiated overview about the individual statements made by the interview partners with a focus on good practices and challenges in the process of lifelong learning strategy implementation.

„Internal view“ on country specific LLL policies	
Strengths	Weaknesses
Reasons for success? Synergies? <i>e.g. special programme for funding adult education</i>	Weak points to consider? <i>e.g. current strategies exclude older age groups</i>
„External view“ on factors that influence LLL	
Opportunities	Threats
Future trends worth following? <i>e.g. companies become aware of chances related to education the older workforce</i>	Situation of society? Existing regulations? Change in policy? <i>e.g. impact of financial crisis: workers might not want to stay away from work</i>

Table 2.1. EFELSE-SWOT Approach

In the following, a short text summary of the strengths, weaknesses, opportunities and threats expressed by the interview partners is provided. Additionally, two tables (table 2.2 and 2.3) show a structured overview of the essential messages of the interviews, with a blue highlight of statements referred to by more than one interviewee.

### SWOT Summary Policy Makers

**STRENGTHS.** The strengths of the implementation of lifelong learning is seen in its potential to improve the conditions of citizens in all areas of life through competence development, e.g. on the labour market, with regard to social inclusion). The implementation of related programs works quite well, given that specific funding mechanisms have been defined, and that cooperation structures have been set up between and within the states. Existing strategy documents, concepts, and regulations for lifelong learning provide a common basis and can guide the implementation of specific activities. It is in common use to set up evaluation and assessment measures for every larger lifelong learning programme implementation.

**OPPORTUNITIES.** In future, lifelong learning will be essential to support the employability of the older workforce and low educated people. Lifelong learning activities can build on and complement the rather specialised vocational qualifications of people, and take into account non-formal and informal learning approaches starting already at kindergarten age. This requires subsidiaries, public funding and well-conceived budget management. Furthermore, cooperation between stakeholders and clarification of responsibilities needs to be managed by policies, also on cross-party level. Localised activities for the promotion of lifelong learning and counselling of interested learners, companies, and training providers are essential for increasing lifelong learning participation rates, and a special focus needs to be set on people from socially deprived target groups. The development can only be evaluated by taking into account differences between and within states, and with the help of indicators beyond participation rates, e.g. exploitation of programs, development of LLL networking structures. The establishment of institutes for quality assurance would be supportive in this respect, however, agreement on a quality approach on Federal level still needs to be found.

**WEAKNESSES.** Education marketing needs to be improved: the awareness for the importance of lifelong learning among individuals, companies, and in society is still too low, and lacking transparency of existing continuing education offers and funding schemes can be observed on all levels. In policy discussions lifelong learning is often used as a buzzword only. Examples of time restrictions for participation in continuing education activities, and shortening of education budgets show a lack of long term planning in this respect. Incentives and low threshold offers for socially deprived citizens are required to reduce the social selection effect of current education policy. However, funding opportunities need to be advanced beyond support for

specific target groups only, and should also aim at high quality training provision. Cooperation of educational stakeholders needs to be based on a common understanding of lifelong learning. Regular and structured exchange of information, clarification of responsibilities, and the reduction of competing approaches are essential factors for successful lifelong learning strategy implementation. This is also relevant on international level, e.g. the implementation of the NQF is challenged by a lack of comparability of German vocational qualifications to other existing qualifications. Quality assurance and monitoring of continuing education development is in the responsibility of the providers and often only performed for its own sake, without effecting the improvement of future offers. Existing lifelong learning and continuing education indicators are subject to certain restrictions: their focus is mainly on vocational continuing education (and not on lifelong learning), and still they do not cover the whole area of existing continuing education offers.

**THREATS.** Long term planning of the development of all areas of the education system needs to be addressed on Länder level. Also, planning with regard to labour market needs is relevant, taking into account e.g. an unexpectedly low participation rate in continuing education during short time work, and concerns about the consequences of a mismatch of demand for high qualifications on the labour market and the vocational qualifications of citizens. Long-term planning on the level of training providers is challenged by the reduction of financing opportunities, and in consequence quality of training provision and employment conditions for staff are at risk of impairment. Also, the strict alignment of funding to the main pillars of the education system (school education, higher education, vocational training) and the inflexibility of existing funding structures impede lifelong learning implementation activities. Furthermore, the structure of the German Federal system is opposed to a coherent lifelong learning strategy, mainly because of unclear responsibilities and divergent interests of the states complicate decision making processes and implementation of actions. A lacking awareness for lifelong learning on all levels is among the most important threats, considering that existing activities and approaches focus mainly on the formal education system, on higher education and vocational training, and lifelong learning is still not considered equal to school education. The German education system is structured by formal qualifications which are based on each other. The accreditation of non-formal and informal learning is hardly important in this respect, either do not fit the structure the process oriented education pathways addressed by the European Qualification Framework. Managing the development of lifelong learning in Germany on the basis of benchmarks would require more specific benchmarks, targeted to the national requirements, and less ambitious as the benchmarks provided on EU level. The lack of an overall quality management strategy and approach for the assessment of lifelong learning implementation is to be considered threatening for future progress as well.



Parameter	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<b>Demand for Learning</b>	<p>(Expected) positive outcomes of continuing education: personal improvements in terms of labour market outcomes (esp. for low-qualified people), income, social inclusion, active citizenship, and individual competence development</p> <p>Standardized integration courses for migrants (and specific subgroups) are offered on federal level, organised by BAMF.</p>	<p><b>Educational marketing needs to increase the demand for learning and awareness of the importance of LLL</b> (e.g. win-win-situation for individuals, companies, society).</p> <p>Short-time training measures (e.g. of the Federal Employment Agency) result in short-time labour market integration only (e.g. measured only 6 months after the training).</p> <p>Continuing education of teachers is restricted by time limits; this would require innovative forms of learning/training</p>	<p>Demographical development increases importance of continuing education, esp. for using the potential of older workers and low-educated in years with decreasing workforce:</p> <p>German training system: focus on professionalised, specialised vocational education; as a consequence, the need for formal continuing education is lower as e.g. in the UK or France which focus on generalized vocational education</p>	<p>High qualifications are useful for individuals, if the number of jobs which require these qualifications is rising; otherwise threat of unemployment of high-qualified people.</p> <p>The demand for continuing education during short-time work (as consequence of the financial crisis) was below the expected level.</p> <p>Long-term planning of the development of the educational system needs to be addressed by the Länder.</p>
<b>Investment in Lifelong Learning</b>	<p>Specific funding regulations and strategies exist and work for several programmes, e.g. on federal level: Educational Savings Plan, BAMF integration courses; on Länder level: Bavarian Labour Market Fund.</p>	<p>Funding opportunities should be available for all income groups; the Educational Savings Plan for example, has a focus on persons with lower income, but they still are expected to be able to save some money for education; offsetting education or training cost against tax liability is mainly advantageous for people with higher income.</p> <p>Expenses of training providers for high-quality distance teaching can only be covered with high enough participation rates.</p>	<p>LLL should be financed and realized with subsidies and public funds</p> <p>In theory, qualifications needed by the economic system could be financed by the economic system.</p> <p>Institutionalisation and budget management are important tools for linking the formal education system and non-formal/informal lifelong learning.</p>	<p>Funds are generally quite small. Main cash-flow still follows the main sectors of the education system (e.g. school education, higher education).</p> <p>Existing funding procedures cannot be changed easily and adapted to new structures; exceptions are not permitted.</p> <p><b>Small training providers have serious problems due to reduced funds and financing;</b> long-term planning is impossible. As a consequence, the employment conditions of staff are suboptimal/uncertain.</p>
<b>Partnership Working</b>	<p>National agreements are relevant for the German states, e.g. the qualification initiative; cooperation between the Federation and states takes place, e.g. for the development of new funding structures (however, this is challenged by the federal</p>	<p>Responsibilities for continuing education are split within the states, and a common understanding would need to be developed within the states to support the exchange of information between states.</p> <p>Availability of too much information</p>	<p>Implementation of LLL only works if all stakeholders are included in the process. Regular exchange is necessary and must not be limited to special events (e.g. conferences).</p> <p>Management and guidance by</p>	<p><b>Federalism is the main structural aspect being opposed to coherent implementation of a LLL strategy in Germany,</b> e.g. responsibilities are not clear, decision making is a tedious process, the states have divergent interests, the states reject debates</p>

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	<p>structure, see “threats”).</p> <p>Adult education centres (VHS; Volkshochschulen) and ministries of education and cultural affairs, employers and trade unions, and the state government and federal government discuss continuing education.</p> <p>The programme “Local Learning” aims at the development of regional education management in cooperation with foundations and municipalities.</p>	<p>hinders retrieval of relevant information; there is a lack of clearly structured information on existing LLL programmes and projects.</p> <p>Cooperation is not always easy, especially prior to election periods, institutions block each other by principle.</p>	<p>policies is necessary to ensure cooperation across different education areas with differently distributed responsibilities; at the same time, cross-party supported initiatives and the inclusion of providers and members of the parliament in discussions can make continuing education independent from “political exhibition fights”.</p>	<p>with the Federal Government, cooperation between the Federal Government and states is restricted, discussions between ministries and training providers focus on financing only.</p> <p>The Federal Government and states perceive consultations of EU as intrusion; education is seen in the responsibility of the states.</p>
<p><b>Learning Culture &amp; Accessibility to Learning Opportunities</b></p>	<p>The LLL strategy (BLK, 2004) formed a common basis for LLL activities.</p> <p>The Concept for LLL (BMBF, 2008) is aligned to concrete implementation of LLL (and less to strategic planning).</p> <p>The Qualification Initiative (Bundesregierung, 2008) is comprehensive with regard to early childhood education, career planning, adult education, continuing education, etc.</p> <p>The flexibility of online learning (e.g. distance learning) is appreciated in the context of LLL.</p> <p>People with migration background who have lived in Germany already for a long time have the right to participate in the BAMF integration courses on a voluntary basis.</p>	<p>The LLL strategy (BLK, 2004) is not focused on tangible implementation activities and has not been advanced since its publishing.</p> <p>Continuing education needs to struggle for financial support.</p> <p>The LLL strategy is mainly a political buzzword without strategic coherence.</p> <p>Lack of incentives for participation in continuing education for lower-skilled people.</p> <p>Educational policy implementation (and related budgeting) is often not based on educational policy.</p>	<p>The Federal Government should support publicity and promotion of LLL; a possible solution would be the establishment of independent, regional LLL counselling centres; financed from public budget; should offer counselling on long-term education planning for companies (esp. SME), individuals, institutions; including training infrastructures for rent to be used by small providers which often cannot afford own rooms.</p> <p>LLL participation rates of all groups of people should increase in future, however <b>a special focus needs to be set on people from socially deprived target groups</b>, low-educated people, older employees, people with migration background, handicapped people, job returners. This requires the provision of target groups-specific approaches and low-threshold offers.</p> <p>Informal learning is important for increasing people’s personal engagement for continuing education (starting already in kindergarten and school, learning to learn). Informal learning on the job as a kind of distant learning in little</p>	<p><b>There is not enough awareness to recognize the necessity of school education, general and vocational continuing education, and LLL</b>; and the need for action is rather huge but socially hardly recognized or accepted; Awareness raising for adult education is required on learner and policy level.</p> <p>The focus of the BMBF includes vocational education and higher education. Non-formal and informal learning processes (as mentioned in the EQF) are not yet part of the future agenda.</p> <p>The focus is on the formal education system. LLL is not considered as equal to school education (lower status).</p> <p>Can modularized and competence based continuing education destabilize the existing vocational training system and related mental representations of jobs?</p> <p>EQF does not fit the German education system; its focus is too much on formal qualifications instead of the actual professional</p>

			groups becomes more and more important within companies.	<p>activities and the pathways and processes that lead to it.</p> <p>The complexity of adult education structures still requires much counselling and information. Low threshold-projects are needed for increased transparency in all education sectors.</p> <p>The formal qualifications are related to each other/ based on each other (e.g. school system and higher education system), and <b>the accreditation of non-formal and informal learning is not well considered</b> in this respect.</p> <p>There is no specified LLL implementation strategy in the Länder; LLL is no priority of the Standing Conference of the Ministers of Education and Cultural Affairs</p>
<p><b>Quality Assurance in Lifelong Learning</b></p>	<p><b>Programme evaluation is implemented for every larger LLL programme and related projects.</b></p> <p>The quality of Distance Learning is regulated by the Distance Learning Protection Act.</p> <p>The BAMF research department conducts a long-term study (Integrationpanel) with participants at the beginning and after completion of the integration course. It aims at quality improvement of the courses and monitoring of the effective integration of participants into German society, measured by e.g. existing contact to German people, participation in German associations, etc</p>	<p>Distance learning statistics consider mainly attendance rates of courses offered by accredited providers; in-company distance learning or offers provided by the chamber of industry and commerce and chamber of crafts are not covered.</p> <p>Continuing education data (e.g. offers, participation rates) do not include internal offers provided by companies for their employees and customer; and a European comparison of these data is difficult.</p> <p>Evaluation results of continuing education are communicated between the states and federal government to a limited extent only, e.g. with regard to specific programmes.</p> <p>Indicators always need to be considered from a short-term and long-term perspective.</p> <p>Providers are mainly self-responsible</p>	<p>An evaluation tool would need to take into account: comparison of differing offers in the states on the basis of comparable conditions in the states.</p> <p><b>Suggested indicators for the evaluation and monitoring of continuing education:</b> low-threshold offers, accessibility; appropriate, technical, financial and social compatibility of offers, participation rate; cost-benefit ratio of participation, appreciation of continuing education by companies, perceived existing challenges; positioning/ difficulties of continuing education providers; Suggestion of indicators for the ideal of regional LLL counselling centres: differentiated participation rates, interest in existing programmes, networking of SME initiated by the counselling centres</p>	<p>For the purpose of management by benchmarks it is essential to formulate binding benchmarks which are specific to a country context. Existing national benchmarks (e.g. participation rates) are often too unspecific.</p> <p>EU benchmarks unrealistic objectives, and are non-binding: they do not show the intended effect on policy making and cause indifference.</p> <p>LLL strategy paper (BLK, 2004) does not include any quality management strategies; assessment of the LLL strategy implementation is not considered.</p> <p>Uncertain employment conditions of continuing education trainers are reflected in the quality of training offers; (but at the same time market processes on the continuing</p>

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		<p>for assessment and evaluation of their offers and projects, and related quality assurance and certification; changes suggested by evaluation results are not always implemented (evaluation for the purpose of evaluation).</p> <p>Reports on the situation in Germany focus on vocational education; LLL as a coherent activity is not considered to the same extent.</p>	<p>Establishment of institutes for quality assurance in education on national level: would require agreement between Federal Government and the states on the necessity of overarching quality assurance measures.</p>	<p>education market improve the quality of training provision)</p>
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Table 2.2. SWOT analysis of the interviews with policy makers.

## ***SWOT Summary Training Providers***

**STRENGTHS.** The most striking strength of German practice institutions may be their orientation towards the demands of (potential) learners. Individual training institutions offer courses tailored to the needs of their clients (with regard to the topics, the acquisition of certificates, the teaching approach e.g. e-learning) and they provide special seminars that are requested by companies. The demands of the changing employment market are anticipated by the training institutions and measures to meet these demands are taken accordingly. These measures include the provision of appropriate information and counselling to prospective participants and people who need further education. Also, collaboration with different partners for designing the most viable courses is an approach followed by many training institutions. The surveyed training institutions share the understanding that the educational quality needs to be kept up, and so quality management and further education for trainers are implemented in most of the consulted institutions. Given the current threats of the economic crisis, lifelong learning is nowadays more important than ever. In order to balance out the effects of the crisis and maintain the business, training institutions tap several different sources of financial funding. Another related strength is discounting course fees and accommodating payment options which takes into account the learners' financial situations.

**OPPORTUNITIES.** The aforementioned changes in the working world are one of the biggest opportunities in lifelong learning today since they raise a new awareness for the need of further education. People, companies and training institutions are increasingly aware of the changing demand for learning. The latter react with innovative course designs to attract and motivate prospective participants for lifelong learning measures. Attracting and motivating people, however, starts with marketing: word-of-mouth may well complement a big proportion of costly marketing activities in the future. Younger participants are more and more prone to using the internet for promoting their learning experiences, while older participants especially value the exchange of ideas and experiences due to personal contacts.

**WEAKNESSES.** The weaknesses identified in the interviews with representatives of German practice institutions are few and are usually resulting from organisational restrictions in smaller or "newer" institutions. Although most training institutions strive to gather funding from different sources, there are some that have to rely on one source only, usually participant fees. In a few cases, it is also not deemed necessary due to the special composition of the target group to offer e-learning or special interest programs. This reduces the accessibility to learning opportunities for those outside of that target group (but at the same time allows the providers to offer specifically targeted courses for this group). Another weakness brought to attention in the interviews was that further education for trainers is sometimes not implemented in the organisational processes of the training institutions. It is seen as the trainer's responsibility to gain further training on their own account.

**THREATS.** The biggest threat to representatives of German training institutions is the decrease of federal funding for lifelong learning institutions during the last 30 years. Especially, since many of the institutions rely on federal funding as one of their main financial sources, this can cause problems. In this respect it has to be noted that also several of the interviewees referred to challenges which result from the current economic crisis, e.g. with regard to the availability of funding opportunities by companies and the possibilities for long-term educational planning.

Parameter	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p><b>Demand for Learning</b></p>	<p><b>Demand oriented trainings:</b> according to respective target groups this includes offering school-leaving certificates, vocational qualifications, further education for unemployed people; considering individuals' needs, flexibility according to individuals' living arrangements and age (e.g. blended learning), European seminars (e.g. political education on-site), consideration of labour market and company needs.</p> <p><b>Special seminars are offered on request by companies</b></p> <p>Topics with high demand: basic political education seminars, economic politics (especially during the last year), ethics and culture, factual knowledge (e.g. management rhetoric).</p> <p>Individual consultation and examination is offered to participants in order to find the right courses for everyone.</p> <p>Offers are adjusted to demands every four years.</p> <p>Individual courses for certain groups are offered on demand.</p>	<p>Number of courses offered on economic topics increasing too slowly.</p> <p>Lack of courses offered for management skills.</p> <p>Lack of money and full-time personnel to meet demands even better.</p> <p>The longer the course the higher the withdrawal rate (courses up to 12 months have a lower withdrawal rate)</p> <p>E-learning is not ideal for participants who have not grown up using the computer.</p>	<p><b>Changes in the working world influence demand for lifelong learning</b>, e.g. increasing demand for management skills due to increased task density; also, the demand for learning in general is increasing, e.g. because of the expected lack of skilled workers in the future, the threat of unemployment, the necessity of using new technologies, and so on.</p> <p><b>Motivating participants</b> by offering additional course types in cooperation with partners or by combining learning with experiences (e.g. guided tours, political education on-site).</p> <p>Personal exchange of ideas is in high demand among older people.</p> <p>Lifelong learning can give life in retirement additional meaning.</p> <p>Younger target group prefers internet/e-learning.</p> <p>Highest demand for short, intense learning units, modularized offers (e.g. weekend language courses).</p> <p>There is also a trend toward long term courses (e.g. half a year "studium generale/ general knowledge") for deeper understanding of course contents.</p> <p>Longest courses: Graduate</p>	<p><b>Economic crisis</b> prevents long-term education planning in firms, seminars abroad are often considered too expensive.</p> <p>Tendency toward shorter educational units (one afternoon instead of several days; education vacation days during the week are not granted anymore), but education needs time – modularization of education measures does not lead to the best results.</p> <p>Demands are leaning toward learning more in less time with less effort.</p> <p>There is not an especially high demand for further/lifelong learning in Germany.</p> <p>Demand for learning depends on the educational level.</p>

			diplomas, <b>re-education (1-3 years)</b> , language courses, health courses, job-related courses.	
<b>Investment</b>	<p><b>Funding varies according to type of institution:</b> sources are participant fees (ranging from 0% to 100%), provider budget, public or independent funds (e.g. by companies), federal or state funds (e.g. by the state of Bavaria, the city of Munich, and so on; sometimes intermittent funding in the context of projects, sometimes steady funding for employee wages etc.)</p> <p>Most of the financial resources (40%) are used for the development of courses.</p> <p>Job safety: Programs are re-designed every four years (legislative period), so employees' jobs in one training institution are safe for this period of time.</p> <p>Participation fees: <b>payment by instalments possible; cost vary according to target group</b> (discounts for unemployed people, pupils, students, disabled persons); <b>fees may be paid by participants themselves, their respective companies, a union or the state</b> (e.g. by the Federal Employment Agency).</p> <p>Maximum cost of a measure is prescribed by AZWV (Anerkennungs- und</p>	<p>Some institutions <b>are mainly funded by participant fees or privately owned</b> → no federal funds.</p> <p>Cost of travel paid by participants.</p>	<p>Best practices for getting funding: being well organized (planning ahead: how many participants are needed for financing how many programmes and at the same time ascertaining which programs are in demand), that means: <b>Having several funding sources</b> such as self-financing participants and companies because federal funding is insecure.</p> <p>Best practices for participants for getting funding: education vouchers.</p>	<p>People are hardly aware of today's challenges in the working world (e.g. the fact that you have to work until the age of 67).</p> <p><b>Federal funding has decreased dramatically over the past 30 years;</b> also lack of public funding for courses abroad (public funds for courses in Germany only); financing of graduate diplomas is uncertain (European funds have been re-assigned by the state of Bavaria).</p> <p>Re-education is not paid for people beyond 50 years of age → lack of awareness for lifelong learning/work until 67.</p> <p>"Education discounters" are a threat to quality education, there is ever less funding available for qualified trainers.</p> <p>There is a risk due to the high proportion of funding coming from participants. Could become a problem if demand decreased (stable at the moment).</p>

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	Zulassungsverordnung Weiterbildung) certification.			
<b>Partnership Working</b>	<p><b>Training institutions have a plenitude of collaboration partners*</b></p> <p>Individual practice institutions have up to 100 cooperation partners (ranging from guest speakers to project co-operations and cooperative seminars)</p> <p>A scientific as well as practical approach and double degree (MBA certificate) offer a strategic advantage to participants</p> <p>One institution is attached to a university of applied science</p> <p>There is a network called "Arbeitsgemeinschaft der Träger der Erwachsenenbildung in Bayern". Goal: making further education the fourth pillar of the Bavarian education system</p>	<p>One practice institution has no actual networks, merely temporary/topical partnerships, no institutionalized partnerships</p>	<p>Democratic, trustful cooperation is the best practice</p> <p>Collaboration with a certified project manager planned</p>	
<b>Learning Culture &amp; Accessibility to Learning Opportunities</b>	<p>Many participants return because of the good learning climate</p> <p><b>Co-operation partners offer counselling at some institutions</b> (e.g. Munich education consultancy)</p> <p><b>Individual counselling on education as well as functional counselling offered</b> by in-house consultants (range: special</p>	<p>No contact with participants beforehand, counselling or consultation offered only upon entering the program</p> <p><b>on-site seminars only</b> (contents are documented in the form of pdf files and distributed to the participants)</p> <p><b>No special programs</b> for older target group or immigrants (reasons: enough courses of that sort already offered in</p>	<p>Education laws of the individual German countries as well as EU-mobility programs (such as Erasmus) bring about a higher demand for and facilitation of education</p> <p><b>Marketing activities</b> include: <b>word-of-mouth</b>, internet, annual program is sent out via newsletter, visits in schools (teachers inquire about talks on special topics),</p>	<p>Legal barrier regarding consultations: provision of consultation on employment law is considered the attorneys' domain (violation of non-competition clause)</p> <p>Sometimes funding bodies do explicitly restrict the provision of certificates</p> <p>In some cases unclear</p>



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<p>consultation on certain topics to small life-coaching)</p> <p>Counselling office offers consultation via telephone</p> <p>Catalogues (online/paper) for every course</p> <p><b>Information events</b></p> <p>Ongoing counselling after completion of program is offered free of charge (for half of the original duration of the course) until graduation</p> <p>Financial issues: courses offered with no charge; <b>10%-15% discount for students, unemployed, soldiers, apprentices, retirees, severely disabled persons</b>; fees may be paid in several instalments; possibilities for self-financing seminars are offered to prospective participants</p> <p>E-Learning/Blended learning: <b>e-learning available</b>, supplemented by on-site seminars and e-learning facilities including XING, facebook etc., materials are provided in hardcopy + digital</p> <p>Gender/age/nationality: <b>some courses are specifically oriented toward special target groups</b> (migrants: integration measures, citizenship; mothers going back to work (e.g. flexible</p>	<p>the area, very defined target group not including disabled persons, immigrants, women etc.)</p> <p><b>No training for trainers implemented</b>, no standardized procedures for ascertaining a trainer's qualification; in-house trainers are often too busy for their own further education</p>	<p>target groups are addressed directly, on site (e.g. pupils, clubs, environmental activists) → cooperative seminars with schools, Armed Forces, churches, social institutions etc., daily newspapers, mailings to companies, informative events on-site; trainers are themselves viewed marketers of their respective courses</p> <p>Demand for further education is usually dependent on the existing level of education: certain institutions <b>attract people with lower education levels</b> as well and probably more than other further education institutions</p> <p>Living arrangements vary → blended learning approach accommodates diverse backgrounds of participants</p> <p>Voluntary, comprehensive further education programme for trainers available at several Bavarian universities</p> <p>Participants want certificates</p>	<p>responsibilities between Federal Government and states governments regarding the issue of awarding certificates</p> <p>Educational laws guarantee employees accessibility to further education programs, e.g. by granting educational leave. Due to the economic crisis, however, companies sometimes seem to prevent their employees from taking advantage of this vested right to further education.</p> <p>One traditional institution has a certain image (e.g. "offers courses for housewives")</p>
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	<p>schedules); seniors: computer courses, SGB9 qualifications); generally <b>high proportion of women in courses</b> (at least half of the participants); assistant and secretary courses are booked by women only; number of senior participants has increased</p> <p>Marketing issues: measures are taken to attract people who have had bad experience with the educational system (e.g. acquisition of school leaving certification in a non-school environment); deprived people are directly approached and informed about possibility to get further education; word-of-mouth; strong, professional marketing, image campaigns, postcard campaigns, target group oriented marketing, campaigns addressing illiterate people</p> <p>Barrier-free facilities, qualification as well as practical experience for handicapped people offered</p> <p><b>Certificates offered by many institutions:</b> IHK certificates (oriented toward EG guidelines); Graduate certificate possibilities: higher education entrance qualification, business administration, university level exams etc.); Some institution's certify upon completion of a final exam, otherwise participants get a certificate of attendance; European accredited certificates</p>			
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	<p>(e.g. Cambridge certificate for language courses)</p> <p><b>Special educational offers for trainers</b> (didactics, media literacy, guidelines for teaching, e-assessment); Education leave for educational staff; Umbrella organization (Association of European Academies) offers further education for trainers</p>			
<p><b>Quality Control and Indicators</b></p>	<p><b>Quality Management certificates</b>, e.g. ISO 9001, PAS 1037 “distance learning provider”, EFQM, AZWV (Anerkennungs- und Zulassungsverordnung Weiterbildung)</p> <p><b>Clearly defined QM processes</b> e.g. trainer interviews, regular evaluations of trainers, methods, contents, general conditions, learning climate by participants → data base; evaluation reported to director and board</p> <p>Participant satisfaction questionnaires during and after each course, trainers review training week with participants at the end of each week</p> <p>Assessment of educational success at the end of the year (participant satisfaction, grades, participant characteristics, number of seminars and participants; trainers can request audits for their courses)</p>	<p>Quality control mostly on an organisational level</p> <p>No certificates after seminars</p> <p>No actual further education for trainers</p> <p>Participant demographics are currently not evaluated</p> <p>One institution is too new for determining whether or not quality standards are met</p> <p>Quality control needs to monitor the implementation of innovative approaches in the course offers</p>	<p>More systematic, efficient evaluation (e.g. follow-up evaluation in five years) &amp; quality management planned</p> <p>MBA program is currently in the process of accreditation</p>	<p>Problem: unspecific data provided by participants on evaluation sheet (e.g. with regard to their job description)</p> <p>In Germany, the link between the different education sections is very weak (school, professional education, university, further education), a tangible overview of the further education offered regionally is needed</p>

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	<p>European Computer License, Language certificates can be obtained (EQF)</p> <p>Labour market integration (how many participants are employed?) is evaluated semi-annually</p> <p>Feedback to trainers about seminar material and participant feedback; rhetoric seminars offered to younger trainers; trainers have to be experienced upon hiring; assessment of trainers' qualification needs with supervisor</p> <p>Learning materials are assessed/reviewed before distribution (ZFU – central agency for distance learning) and in one case re-assessed every three years</p>			
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Table 2.3. SWOT analysis of the interviews with practice institutions.

\* cooperation partners: e.g. IHK (Industrie- und Handelskammer); IVB (Immobilienverband Bayern); association of health insurance companies; employers liability insurance association (Berufsgenossenschaft); European associations; attorneys; schools (federal/ semi-federal/ private schools; engineering/ economic/ business schools); adult education centers; universities; unions; Armed Forces; Federal Employment Agency; churches; social institutes; different municipal institutions (e.g. libraries suggesting books that go with certain VHS courses etc.); Munich philharmonics; Munich education consultancy; forum distance learning; diverse companies (e.g. for practical experience placements, projects); co-operation with certain cities to ascertain needs of local employment market (industries, trade); project with Ministry of Labour and Social Affairs; economic co-operation (projects abroad).

### 3. Good Practice Examples from Germany

The University of the Bundeswehr München has identified good practices in the field of lifelong learning in Germany. A literature and internet research has been conducted: information from existing good practice reports (e.g. in the context of the German model project Lifelong Learning) has been collected and it has been complemented with descriptions of recent projects and policies (e.g. in the context of the Qualification Initiative). The alphabetical list does not claim completeness; however, it provides examples of lifelong learning activities in different fields, e.g. increasing the participation through target group specific offers and financing structures, creating networks of lifelong learning stakeholders, supporting a learning culture through awareness raising and information activities. The aim of this list is to show that Germany was and is quite active with regard to implementing lifelong learning on many different levels (e.g. regional, federal) and for various target groups. Especially demand for learning, and the accessibility to learning opportunities are supported by target group specific approaches. Further, the networking projects strongly support the aspect of partnership working in Germany. Also, the development of a learning culture is supported by provision of information and also a focus on the importance of learning in the context of work and self-directed learning approaches. Although to a lesser extent, activities aiming at quality assurance have been identified.

#### ***AQUA – Qualifying academics for participation in the labour market (AkademikerInnen Qualifizieren sich für den Arbeitsmarkt)***

Continuing education courses for academics who receive unemployment benefit, also with a special focus on people with migration background. Target group: unemployed academics; since 1965 (see <http://www.obs-ev.de/aqua/>).

#### ***Education association in the health sector (BiG - Bundesverband im Gesundheitssektor)***

The Bildungsverbund im Gesundheitssektor BiG was established in the context of the BLK model programme “Lifelong Learning” in 2001. Many group partners of different working fields are using the new cooperation structures of “BiG” which support further educational measures in Saxony-Anhalt. Target group: trainers in the health sector; from 2001-2005 (see [http://www.die-bonn.de/lll/TagungSchluss/Gesundheit\\_ST01.htm](http://www.die-bonn.de/lll/TagungSchluss/Gesundheit_ST01.htm)).

#### ***Education cheques (Bildungsschecks)***

The Land government of NRW helps employees of small and medium-sized enterprises to take part in continuing vocational education by offering education cheques. Seminar costs up to 500€ are covered (with money from the European Social Funds). Target group: employees of SME; since 2007 (see <http://www.bildungsscheck.com>).

#### ***Development and promotion of innovation continuing education learning arrangements in cultural and continuing education establishment (EFIL - Entwicklung und Förderung innovativer weiterbildender Lernarrangements in Kultur- und Weiterbildungseinrichtungen)***

The project that examined the contributions that were made by libraries to promote self-directed learning and how libraries served as places of learning extended well beyond the project’s planned duration. Target group: libraries; from 1999-2002 (see <http://www.die-bonn.de/efil/>).

#### ***Development, implementation and testing of new teaching and learning arrangements in political education at adult education institutions (Entwicklung, Umsetzung und Erprobung neuer Lehr- und Lernarrangements in der politischen Bildung an Erwachsenenbildungseinrichtungen)***

Development of a network of educational institutions in the field of political education, e.g. continuing education institutions, vocational and trade union education institutions, youth education institutions, and media institutes. The aim is to develop the self-responsibility of citizens in learning and political decisions. Target group: young adults, adults; from 2000-2003 (see <http://www.blk-lll.de/LLL/laender/th1.htm>).

#### ***Practical knowledge for initiatives (Erfahrungswissen für Initiativen)***

The goal of the project is to establish a new role of older people in society: older people should be encouraged to engage in volunteer charity work. They can become senior trainers and pass their practical knowledge to society. Target group: age group 50+, trainers; from 2002-2006 (see <http://www.efi-programm.de/>).

***Cooperative learning on the internet (Gemeinsam Lernen über das Netz)***

The aim of the project is to initiate cooperative self-learning groups on the internet. These groups form a network, include single learners and are intergenerational, although mainly targeted at older adults. Target group: age group 50+; from 2000-2005 (see <http://www.gemeinsamlernen.de/>).

***Infoweb for continuing education (Infoweb Weiterbildung)***

InfoWeb Weiterbildung (IWWB) is a governmental funded project, which was developed for the whole field of further education. Aim of the project is to unify the access to information of more than 100 regional, supra-regional and specialised further education databases. A new communicative network of for appreciable agents of the field of further education information was build. The portal addresses privately further education interested people and companies. It provides a real-time-meta-search-engine for the whole field of further education. Target group: young adults, adults, age group 50+, companies; since 2002 (see <http://www.iwwb.de>).

***Innopoint (Innopunkt)***

The 3rd INNOPOINT idea contest of the Brandenburg Ministry of Work, Social affairs, Health and Women (MASGF) aims at network formation between small and medium-sized enterprises (SME) for anticipatory assessment of qualification demand for accomplishing the strategically and economical objectives. Companies will cooperate with educational providers of the region, research facilities, employee unions' representations and other partners (like employee agencies, chambers of labours, employers' associations, unions etc.). Target group: small and medium sized enterprises (SME); from 2001-2003 (see <http://www.innopunkt.de>).

***Innovative methods for the promotion of lifelong learning by cooperation of university and continuing education institutions (Innovative Methoden zur Förderung des lebenslangen Lernens im Kooperationsverbund Hochschule und Weiterbildung)***

The project aims at developing the professional competences of trainers in continuing education by lifelong learning and related organisational development of continuing education institutions. Target group: continuing education institutions, trainers; from 2001-2003 (see <http://www.blk-III.de/LLL/laender/rp2.htm>).

***Intercultural continuing education in a network of SME (Interkulturelle Weiterbildung im Netzwerk für KMU)***

Promotion of learning at the workplace and development of methods for lifelong learning in the field of intercultural qualification, taking into account connections between self-organised learning and formal and non-formal learning in institutions. Focus on general, vocational and political education with the aim of raising the intercultural competences of employees, apprentices, employee representatives, and managers in SME. Development of continuing education institutions towards information and counselling centres, adaptation of existing didactical concepts according to the needs of SMEs, development of a network for the facilitation of intercultural competences in SME. Target group: employees, continuing education institutions; from 2000-2005 (see <http://www.blk-III.de/LLL/laender/nrw1.htm>).

***Lifelong learning in the research-based cooperation of school-seminar-university (Lebenslanges forschendes Lernen im Kooperationsverbund Schule-Seminar-Universität)***

A network of schools, seminars, continuing education institutions and universities was established (cooperation association) which aims at the practical implementation of lifelong research-based learning. It should increase the ability of learners to participate in self-organised and research-based continuing education, and at the same time support systematic quality assurance and evaluation processes. Target group: young adults, adults; from 2000-2005 (see <http://www.blk-III.de/LLL/laender/ns1.htm>).

***Teaching and learning in the network continuing education (Lehren und Lernen im Netzwerk Weiterbildung)***

An open learning network was established by institutions of youth and adult education. It forms the context for the initiation of specific projects for the development of problem-based and self-organised learning cultures. These projects include several education institutions. Target group: young adults, adults; from 2000-2005 (see <http://www.blk-III.de/LLL/laender/mv1.htm>).

***Passages of lifelong learning in vocational qualification processes of educationally deprived groups (LeiLa - Passagen lebenslangen Lernens in beruflichen Qualifizierungsprozessen von bildungsbenachteiligten Zielgruppen)***

The project's aim was to identify and develop instruments for the development of basic learning skills of educationally deprived young adults to acquire qualifications during different phases of their vocational biography. A network of vocational schools, training and continuing education institutions, vocational counselling institutions, enterprises and research institutions is established. Target group: young adults, educationally deprived; from 2000-2004 (see <http://www.iaw.uni-bremen.de/leila/>).

***Learning and living worlds in the area of Oldenburg (Lernen und Lebenswelten im Oldenburger Land)***

Core activities of "Lernen und Lebenswelten im Oldenburger Land" are establishing and expanding sustainable forms of cooperation to facilitate lifelong learning of lower-educated people and socially deprived groups. The network further supports the recognition and certification of informal competences within new learning cultures and networking. Measures are for example the development of criteria for acknowledgment of informal learning results, the setup of an education consultation net, the establishment of an education server, get-to-know-tables, learning cafes for the acquisition of media competences, low-threshold education offers and adequate offer designing. Target group: young adults, women, people with migration background, older employees, low-educated people in rural areas; since 2002 (see <http://www.lernenfuersleben.de>).

***Learning cultures and competence development (Lernkultur Kompetenzentwicklung)***

BMBF programme, Focus: company-based and company-focused continuing education; basic research and practical development work were combined in many different projects. Target group: young adults, adults; from 2001-2007 (see [www.bmbf.de/de/406.php](http://www.bmbf.de/de/406.php)).

***Quality Certification in Continuing Education (LQW - Lernerorientierte Qualitätstestierung in der Weiterbildung)***

Quality management and certification model: development and national implementation of a quality certificate specially designed for continuing education providers. The model places the learner at the centre of the quality development process. Target group: continuing education institutions, trainers; since 2000 (see <http://www.artset-lqw.de/cms/>).

***Networks to implement self-directed learning in continuing education institutions (NIL - Netzwerke zur Implementierung selbstgesteuerten Lernens in bestehende Träger der Erwachsenen- und Weiterbildung)***

The goal of the project was the establishment of a network which supported part-time, full-time and self-employed trainers to implement new, more independent forms of learning in continuing education institutions. Target group: trainers; from 2000-2005 (see <http://www.projekte.wb-giessen.de/?Projekt=NIL%252520/%252520QINEB>).

***Qualification offensive Hesse (Qualifizierungsoffensive Hessen).***

Small and medium-sized enterprises (SME) face the task of reacting to technological, organisational and economical changes. Important requirements for a successful accomplishment of these tasks are continuous and purposeful further education and lifelong learning. The qualification offensive Hesse wants to support SME in Hesse in this respect.

ActionLine 1: "learning regions": Aim is to establish cross-industrial and regionally specific support- and information structures for SMEs and to offer adequate further education measures.

ActionLine 2: "future themes": Initiation of qualification measures and further education for special future themes, e.g. e-Commerce, e-Learning or qualification management in touristic firms.

ActionLine 3: "new ways": ways to reduce barriers to further education in SMEs should be exemplarily developed and tested, e.g. further education partnerships, e-Learning, knowledge-management, quality managements in further education or Hessian further education database ([www.hessen-weiterbildung.de](http://www.hessen-weiterbildung.de)).

Target group: SME; from 2000-2006 (see <http://www.esf-hessen.de/>).

***Regional continuing education associations (Regionale Weiterbildungsverbände)***

In Schleswig-Holstein, a comprehensive net of eleven regional continuing education associations with about 360 involved institutes exists. Its goal is the provision of transparent advice and information about further education; Target group: young adults, adults, age group 50+, SME; since 1998 (see <http://www.weiterbildungsh.de/infonetzweiterbildung/doks/weiterbildungskonzept2003.pdf>).

***Self-learning competences, pedagogical professionalism and development of a new learning culture (Selbstlernfähigkeit, pädagogische Professionalität und Lernkulturwandel)***

Self-learning strategies and abilities form the basis for life long learning of adult learners. The project aims at the development of those competences, and the testing and development of appropriate methods and concepts for adult education. Target group: young adults, adults; from 2002-2003 (see <http://www.blk-III.de/LLL/laender/rp1.htm>).

***Self-learning Center Offenbach (Selbstlernzentrum Offenbach)***

The Selbstlernzentrum Offenbach (self-learning centre Offenbach) was developed in the frame of the learning regions network Open Learning Offenbach. Interested learners of all age groups have the chance to use computer-based self-learning programmes for various knowledge areas. Counsellors support the learners in selecting the appropriate self-learning programme and accompany the learners during the work with the programme according to individual learning plans. Learners can choose the timing and speed of learning. Target group: all age groups, people with migration background, unemployed people, employed people; since 2000 (see [www.selbstlernzentrum-of.de](http://www.selbstlernzentrum-of.de)).

***Self-directed, lifelong learning at work (SOLAR - Selbstgesteuertes Lebenslanges lernen in der Arbeitswelt)***

The aim of the project is the development, implementation and evaluation of an organisational development approach to promoting self-organised, lifelong learning in enterprises. The core of the concept is the sustainable promotion of self-learning of employees in the framework of personnel policies using innovative methods of self-directed learning. Target group: employees; from 2000-2004 (see <http://www-user.uni-bremen.de/~los/projekte/abgeschlossen/solar/start.html>).

***Networking concept of educational institutions and employment providers for continuing education (Vernetzungskonzept von Bildungseinrichtungen und Anstellungsträgern für Weiterbildungsarrangements)***

In the context of lifelong learning at universities, the infrastructure (learning environments, and resources for counselling organisation and coordination) and external cooperation networks (of providers of education, training, employment, and vocational associations) is not well structured and assessed. This is essential to enable knowledge transfer and motivation for lifelong learning for institutions and learners. Target group: continuing education institutions, universities; from 2001-2005 (see <http://www.blk-III.de/LLL/laender/st1.htm>).

***Workbased Learning an der Fachhochschule Aachen (WBL)***

Through the WBL concept, adults who previously had no access to higher education were given the chance, through recognition of their formal skills and skills acquired through their work, to obtain an academically recognised qualification. Target group: young adults, adults; since 2005 (see <http://www.fh-aachen.de/6666.html>).

***ZIB centre for information and education (Zentrum für Information und Bildung der Kulturbetriebe Unna)***

The Zentrum für Information und Bildung (zib) der Kulturbetriebe Unna (centre for information and education) unites educational institutions and information from a cultural perspective in one building, and it considers itself as a cultural and social place in form of an information market that stimulates learning with all senses. Target group: all age groups; since 2004 (see [www.unna.de/zib/index.htm](http://www.unna.de/zib/index.htm)).



#### 4. Reflection on the e-Demos Forum Discussion

In the course of the project’s aim to discuss LLL parameters and strategies in Europe on national and international level, an online forum was established. The EFELSE forum “e-Demos” (<http://promitheas.iacm.forth.gr/e-demos/index.php>) provides the possibility to discuss measures, policies, and practices of LLL between practitioners and experts on either the European or the national level. Especially country-specific LLL implementation strategies should be the subject of discussion for interested practitioners and experts from the different European countries. Therefore, moderated forums were implemented on the above mentioned platform in February 2010.

The EFELSE project guidelines regarding networking activities suggest the invitation of approximately 80 experts from each country to participate in the forum. The first experts in Germany were contacted in the context of the EFELSE interviews in 2009. In February 2010, about 140 policy makers and practitioners in the field of LLL were invited to participate in the discussion of LLL strategies in Germany. Via Email, each of them received a personal invitation to take part in the discussion (see figure 4.1). The invitation email contained information about the project’s overall intent and referred to more detailed information provided in the attached EFELSE project flyer (in German) and the personal invitation letters.

Nearly 10% of the invited people responded to the invitations personally or on behalf via email or telephone. Mostly, the experts wanted to inform the German project partners that they strongly appreciate the forum’s intent.

Since 10<sup>th</sup> February 2010, the e-Demos homepage also shows a teaser to the forum: the teaser points to the different topics and invites visitors of the webpage to participate in the discussion. The forum contains an international sub-section (in English), and a section for German-speaking participants.

Figure 4.1. Invitation letter attached to email-invitation of experts and practitioners in Germany.



The international forum, which is in English, was published on the 5<sup>th</sup> of February. It is titled “Future perspectives of adult education and training in Europe”, and introduces the EFELSE project as well as the six EFELSE evaluation parameters demands for learning, investment in adult education, accessibility to learning opportunities, creating a learning culture, partnership working, and quality control and indicators. The introductory posting suggests discussions on threats and opportunities on LLL in Europe, as well as a discussion on LLL under the constraint of the economic crisis (see figure 4.2).

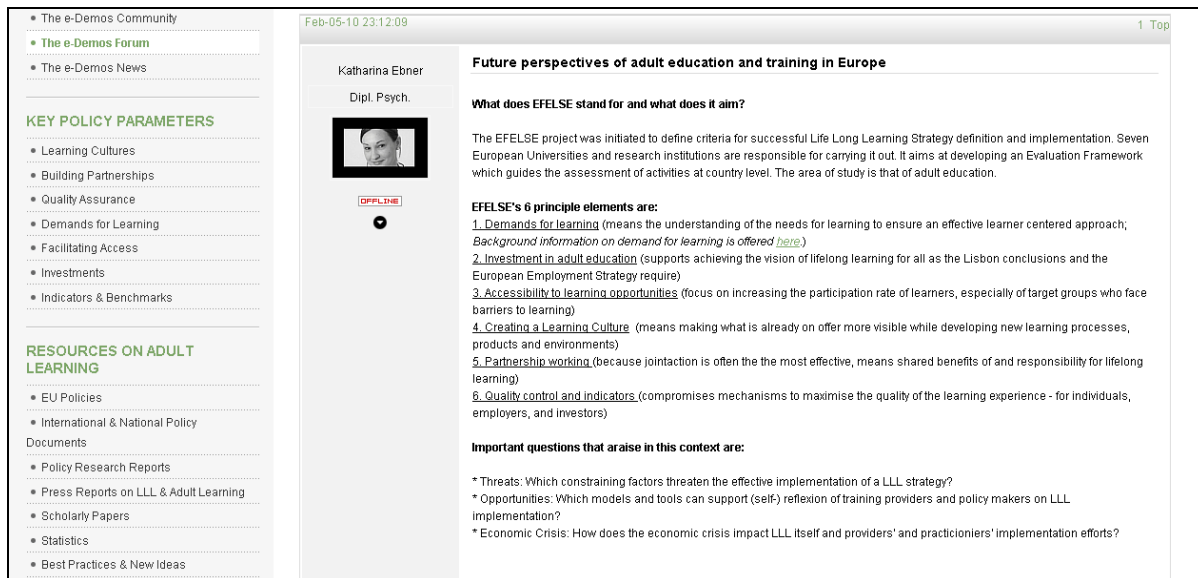


Figure 4.2. Screenshot of the initial posting of Forum 1 (English)

The second forum called “LLL implementation in the context of Germany” is in German and invites German-speaking forum users to participate in discussion on the LLL situation in Germany. Since its launch on February 5<sup>th</sup>, participants have the possibility to discuss 1. how needs of learners in Germany can be estimated in a suitable way, 2. how accessibility to learning offers can be optimized, 3. how participation in learning can be enhanced regarding different target groups, and 4. which forms of evaluation fit best for the different learning offers taking into account all stakeholders – training providers, training recipients, and superior institutions (see figure 4.3).

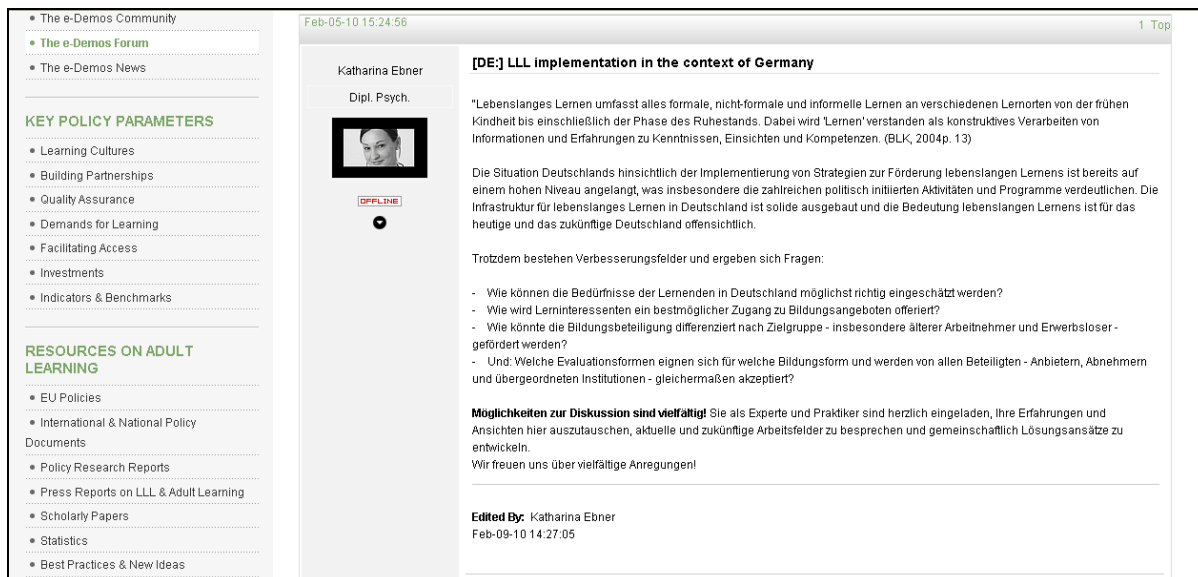


Figure 4.3. Screenshot of the initial posting of Forum 2 (German)

Both forums are open for discussion until the end of March 2010.

Although the invited people in German generally appreciated the intent of the EFELSE project and forum, they did not see the need to log in to the forum and participate in the discussion. This could be for several reasons, e.g. because of time problems of policy makers and training providers, a lacking need to discuss lifelong learning issues on a national level, or because related discussions are already led in other forums (in the internet or real life).

A profound internet research on already existing forums about LLL and related issues was conducted to generate an overview on existing networking-activities in Germany and therefore consider the hypothesis that discussions take place in other forums, or do not take place at all. Online-networks, forums, weblogs and websites of events dealing with lifelong learning, adult education and continuing education were browsed and compassed plenty of results.

An exemplary list of online discussion forums and weblogs in German(y) is provided in table 4.1:

Internet forum on LLL and related topics	Content with relevance for EFELSE	Usage statistics (Status: 19.03.2010)	URL
ManagerSeminare Weiterbildungsforum	The forum includes a sub-forum for debating current continuing education topics (Weiterbildungsdebatte), e.g. the PISA-like benchmarking study for adults is discussed, and the effectiveness of continuing education is questioned in a topic called the “continuing education lie”	The forum has 1107 users (53 active users); latest topic startet on March 19, 2010.  The topics about the “continuing education lie” (12 replies) and “PISA for adults” (7 replies) belong to the most discussed topics in the sub-forum for debating continuing education issues.	<a href="http://www.managerseminare.de/foren/">http://www.managerseminare.de/foren/</a>  <a href="http://www.managerseminare.de/foren/showthread.php?t=505">http://www.managerseminare.de/foren/showthread.php?t=505</a>  <a href="http://www.managerseminare.de/foren/showthread.php?t=529">http://www.managerseminare.de/foren/showthread.php?t=529</a>
XING – Global networking for professionals	Including a forum on human resource development (HRD): an international forum, with a German sub-forum, with many specific HRD topics, but also related discussions on continuing education issues, e.g. related to the establishment of a web-portal for lifelong learning, discussion about efforts of stakeholders and learners in continuing education, discussion if Germany is facing a lack of high-educated	The platform exists since December 2004; it has 18.545 members (international level); latest topic started on March 9, 2010.  The topics about the efforts expended for continuing education (65 replies) and the expected lack of professionals (78 replies) were discussed vividly.  The web-portal for lifelong learning	<a href="https://www.xing.com">https://www.xing.com</a> <a href="https://www.xing.com/net/humanresources/human-resources-allgemein-6/27837022/#27837022">https://www.xing.com/net/humanresources/human-resources-allgemein-6/27837022/#27837022</a>  <a href="https://www.xing.com/net/humanresources/human-resources-allgemein-6/wieviel-aufwand-fur-berufliche-weiterbildung-27236239/">https://www.xing.com/net/humanresources/human-resources-allgemein-6/wieviel-aufwand-fur-berufliche-weiterbildung-27236239/</a>  <a href="https://www.xing.com/net/humanresources/human-resources-allgemein-6/fachkraftemangel-27411599/">https://www.xing.com/net/humanresources/human-resources-allgemein-6/fachkraftemangel-27411599/</a>  <a href="https://www.xing.com/net/pri6a5e40x/humanresources/human-resources-allgemein-6/web-">https://www.xing.com/net/pri6a5e40x/humanresources/human-resources-allgemein-6/web-</a>

	professionals and more.	discussion was not in the focus of interest (2 replies).	<a href="http://portal-fur-lebenslanges-lernen-27837022/27837022/#27837022">portal-fur-lebenslanges-lernen-27837022/27837022/#27837022</a>
<b>Web-blog on LLL and related topics</b>	<b>Content</b>	<b>Usage statistics</b>	<b>URL</b>
Deutscher Bildungsserver – Blogs on continuing education	Overview on blogs about continuing learning	N/A	<a href="http://www.bildungsserver.de/zueigen.html?seite=6327">http://www.bildungsserver.de/zueigen.html?seite=6327</a>
Deutscher Bildungsserver – Blogs on e-learning	Overview on blogs about e-learning	N/A	<a href="http://www.bildungsserver.de/zueigen.html?seite=6328">http://www.bildungsserver.de/zueigen.html?seite=6328</a>
<b>Blogs related to LLL (examples)</b>	<b>Content</b>	<b>Usage statistics</b>	<b>URL</b>
Bildungsblog – Community-Weblog on learning, teaching and education	Blog by Stephan Mosel, contains blog postings about more than 50 different topics, including e-Learning, adult education, gender issues, second education pathway, soft skills, self-directed learning, etc.	Regular contributions since February 2003; latest contribution March 17, 2010; 165 subscribers; non-registered visitors not included	<a href="http://bildung.twoday.net">http://bildung.twoday.net</a>
Grellblog – Media and Lifelong Learning	Accompanies activities of the professorship of media and life long learning at the University Potsdam (Prof. Petra Grell); links to five others web-blogs that are hosted and edited by other professors in the field of media, education and learning	Regular contributions since October 2008; latest contribution: March 11, 2010	<a href="http://www.uni-potsdam.de/db/grellblog">http://www.uni-potsdam.de/db/grellblog</a>
L3Lab Lifelong Learning – German/Austrian blog on continuing education	Hosted by Wolfgang Jütte & Christian Kloyber; contributions in more than 30 different categories, e.g. e-Learning, adult education, informal learning, guidance and counselling, gender issues, education policy, etc.	Regular contributions since November 2006; latest contribution February 25, 2010	<a href="http://l3l.erwachsenenbildung.at">http://l3l.erwachsenenbildung.at</a>

Strukturnetz Thoughts on adult education, e-learning, didactics, competence development, etc.	contains blogs on 21 different topics	N/A regular contributions from October 2005 to May 2008; latest contribution: may 2008	<a href="http://www.strukturnetz.de/blog">http://www.strukturnetz.de/blog</a>
Weiterbildungsblog Blog on issues of continuing education	Hosted by Jochen Robes; contributions on Human Capital Management, education controlling, informal learning, life long learning, learning management systems, e-learning and many more	regular entries on up-to-date-topics since April 2003; latest contribution: 17 <sup>th</sup> March 2010	<a href="http://www.weiterbildungsblog.de">http://www.weiterbildungsblog.de</a>

Table 4.1. List of online discussion forums and weblogs in German(y) related to lifelong learning.

Apart from discussion and blogging on the internet, also a variety of events, conferences and exhibitions in Germany deals with LLL and related issues and brings together experts and practitioners working in those fields. In the following, exemplary events are described that took place during the EFELSE project runtime or are planned for the next year (table 4.2):

Conferences, congresses and exhibitions on LLL and related topics in Germany (examples)	Date, Place	Short description (content, focus)	URL
Autumn Congress of the Commission on Educational Organization, Planning and Rights: "Evaluation, Education and Society", Special Interest Group of the Deutsche Gesellschaft für Erziehungswissenschaft (DGfE) / Herbsttagung der Kommission Bildungsorganisation, -planung, -recht (KBBB): „Evaluation, Bildung und Gesellschaft“ Fachgruppe der DGfE (Sektion 4)	08.10.2009 – 19.10.2009  Münster	Congress  Scope: national; organized by the German Society of Educational Sciences  Deals with the implementation of evaluation proceedings in the educational system; questions potentials of evaluations and power of different procedures; reflection upon intended and not intended effects of evaluations on different layers like society, politics, science, and pedagogical practice.	<a href="http://egora.uni-muenster.de/ew/sp_auto_64067.shtml">http://egora.uni-muenster.de/ew/sp_auto_64067.shtml</a>  <a href="http://www.dgfe.de/ueber/sektionen/folder.2004-09-09.5924378196/Kommission%20Bildungsorganisation.%20Bildungsplanung.%20Bildungsrecht%20(KBBB)/">http://www.dgfe.de/ueber/sektionen/folder.2004-09-09.5924378196/Kommission%20Bildungsorganisation.%20Bildungsplanung.%20Bildungsrecht%20(KBBB)/</a>
Challenges for Education Experts in Professional Education and Training / Herausforderungen an das Bildungspersonal in der beruflichen Aus- und Weiterbildung	27.04.2010 – 28.04.2010  Bonn	Forum  Scope: national; funded by the Federal Ministry of Education and Research  Deals with issues like competency development of education specialists, training of teacher, the modification of teacher-role, heterogeneously compounded learning groups,	<a href="http://www.kibb.de/474_1054.htm">http://www.kibb.de/474_1054.htm</a>

		cooperation and networking between provider and stakeholders in workshops	
Conference “New benchmarks in EU education policy 2010-2020” Fachtagung “Neue Benchmarks in der EU Bildungspolitik 2010-2020”	09.07.2009  Bonn	Conference: Scope: international  The focus on the conference was on the discussion of the new EU benchmarks for education from a education policy perspective.	<a href="http://www.na-bibb.de/benchmarks_1239.html">http://www.na-bibb.de/benchmarks_1239.html</a>
Didactica - Trade Faire for Education didacta / Didactic – Die Bildungsmesse	16.03.2010 - 20.03.2010  Köln	Trade Fair Scope: European wide/ international focuses on divers subjects such as continuing education, school and university, and education counselling; covers topics like e.g. global learning and education for sustainable development, competency development, education on media, e-learning, social learning, evaluation of continuing education, education with web 2.0, mobile learning and many more.	<a href="http://www.didacta-koeln.de">http://www.didacta-koeln.de</a>
DIE-Forum Continuing Education / DIE-FORUM Weiterbildung	01.12.2009 – 02.12.2009  Bonn	Forum on Cooperation and Competition in Adult and Continuing Education - Prospects on Lifelong Learning Scope: national  Focuses on the establishment of education structures that are convenient for diverse institutions and divisions as well as its linkages; questions the development of cooperation between education providers.	<a href="http://www.die-bonn.de/portrait/aktuelles/veranstaltungen_details.asp?ID=380">http://www.die-bonn.de/portrait/aktuelles/veranstaltungen_details.asp?ID=380</a>
gtw-Autumn Conference / gtw-Herbstkonferenz	05.10.2009 – 06.10.2009  Bremen	Conference Scope: basically regional, open nationally  Focuses on industrial and technical domains, discusses research and education concepts for professional education; deals with questions about didactical approaches, competency measurement, transition from school to professional education, and teacher education models in the context of Bachelor- and Master studies.	<a href="http://www.itb.uni-bremen.de/gtw/modules/UpDownload/store_folder/Konferenzen/itb_gtw-flyer_final.pdf">http://www.itb.uni-bremen.de/gtw/modules/UpDownload/store_folder/Konferenzen/itb_gtw-flyer_final.pdf</a>

<p>Online Educa International Conference on Technology Based Education and Training / Internationale Konferenz für technologisch gestützte Aus- und Weiterbildung</p>	<p>01.12.2010 – 03.12.2010  Berlin</p>	<p>Trade Fair Scope: international International conference on technology based Education and Training bringing together service and product providers in e-learning; discussion about management and organization of e-learning-systems, future tools and technologies, web 2.0-solutions and social networks as well as generation Y and innovative teaching concepts.</p>	<p><a href="http://www.online-educa.com/de">http://www.online-educa.com/de</a></p>
<p>Professional Education for People with Migration Background Berufliche Bildung für Menschen mit Migrationshintergrund</p>	<p>17.09.2009 – 18.09.2009  Darmstadt</p>	<p>Expert Conference Scope: national; funded by the Federal Ministry of Education and Research Focuses on persons with migration background and deals with questions about how to deliver them with better qualification, or how school leaving exams of the home countries can be accredited in Germany; special topics are e.g. monitoring of the professional education of younger people with migration background, transition from school to professional apprenticeships, regional/ local professional education, professional post hoc-education, continuing education and intercultural competency development of people with migration background.</p>	<p><a href="http://www.kibb.de/cps/rde/xchg/SI-D-3C5594CA-CA02DA4C/kibb/hs.xsl/474_724.htm">http://www.kibb.de/cps/rde/xchg/SI-D-3C5594CA-CA02DA4C/kibb/hs.xsl/474_724.htm</a></p>
<p>wbv-Expert Conference „Prospect Education Management: Successful Networking between Enterprises and Communes“ / wbv-Fachtagung „Perspektive Bildungsmanagement: Netzwerke zwischen Unternehmen und Kommunen erfolgreich gestalten“</p>	<p>28.10.2009 – 29.10.2009  Bielefeld</p>	<p>Expert Conference Scope: national Discussion on education management, personnel development and regional development, encouragement of employment and education counselling; focuses also on potentials for service providers in the educational sector, for companies and communes.</p>	<p><a href="http://www.wbv-fachtagung.de">http://www.wbv-fachtagung.de</a></p>
<p>Research Workshop on Methodologies in Adult Education and Training 2010/ Werkstatt Forschungsmethoden in der Erwachsenenbildung/Weiterbildung</p>	<p>23.02.2010 – 24.02.2010  Bergisch Gladbach</p>	<p>Workshop Scope: national; organized by the German Society of Educational Sciences The workshop addresses young academics in the field of adult</p>	<p><a href="http://www.die-bonn.de/portrait/aktuelles/veranstaltungen_details.asp?ID=383">http://www.die-bonn.de/portrait/aktuelles/veranstaltungen_details.asp?ID=383</a></p>

2010	National	education and continuing education and provides the possibility to exchange and discuss current research (i.e. dissertations, postdoctoral qualification projects, research projects).	
zbw annual conference: Continuing education in Bavaria – overcoming the crisis zbw – Jahrestagung: Weiterbildung in Bayern - Wege aus der Krise	16.07.2009  München  Länder level	Conference Scope: Länder level (Bavaria) Focus on strategies for managing in-company continuing education with the aim to overcome challenges of the economic crisis by vocational continuing education. The conference addresses human resources developers and representatives from companies and policy.	<a href="http://www.f-bb.de/veranstaltungen/tagungen/tagungen-detail/vinfo/zbw-jahrestagung-weiterbildung-in-bayern.html">http://www.f-bb.de/veranstaltungen/tagungen/tagungen-detail/vinfo/zbw-jahrestagung-weiterbildung-in-bayern.html</a>

Table 4.2. Events, conferences and exhibitions in Germany related to lifelong learning.

In sum it can be said, networking activities – online and offline – in Germany on topics related to lifelong learning, continuing education and adult education are rather selective. Only few lively discussions and events could be retrieved, which does by no means reflect the number of people active in lifelong learning and adult education in Germany (e.g. a WSF study identified more than 500.000 trainers in adult education in 2005; see "EFELSE State-of-the-Art Part I")

Looking at offers online, it can be seen that especially weblogs (blogs) are used for discussing and sharing information related to lifelong learning and continuing education, but only few individuals use this opportunity. Generally, the web 2.0-applications are used as a kind of online diary by one person. Readers have the chance to subscribe to blogs via RSS<sup>2</sup> feeds and also have the possibility to comment on blog entries. The above examples (see table 4.1) show, that education blogs in Germany are used by researchers and practitioners to share information and provide personal opinions on adult education topics, events, publications; however it can be assumed that users often are part of a rather small network, often with personal contact. The comment functionality is often only used by the authors of the blogs and a few readers to add additional information. Only in some rare cases contents of a blog entry were discussed. Also, participation of policy makers in the online activities was found less often than that of researchers and practitioners (although, with 16 state ministries for education and cultural, labour and social affairs, and further ministries on federal level, there are many policy makers who are engaged in issues related to lifelong learning).

Various offline events offer the opportunity to discuss lifelong learning and adult education related issues (see table 4.2). National and regional conferences, workshops, congresses, and trade fairs address policy makers, researchers, practitioners, training providers as well as other institutions dealing with the broad set of challenges in adult and continuing education in Germany. These events are barely linked to each other and each provider follows own and in-coherent approaches towards discussing lifelong learning and continuing education issues.

The existing online and offline opportunities for knowledge sharing and debating lifelong learning issues show that at least some people (education stakeholders) have identified a general need for discussion and try to share their thoughts. The European strategy for lifelong learning and the EFELSE parameters are seldom in the focus of these discussions. The low interest to participate actively (as compared to reading without contributing) in the EFELSE e-Demos forum cannot be interpreted as a general lack of interest in lifelong

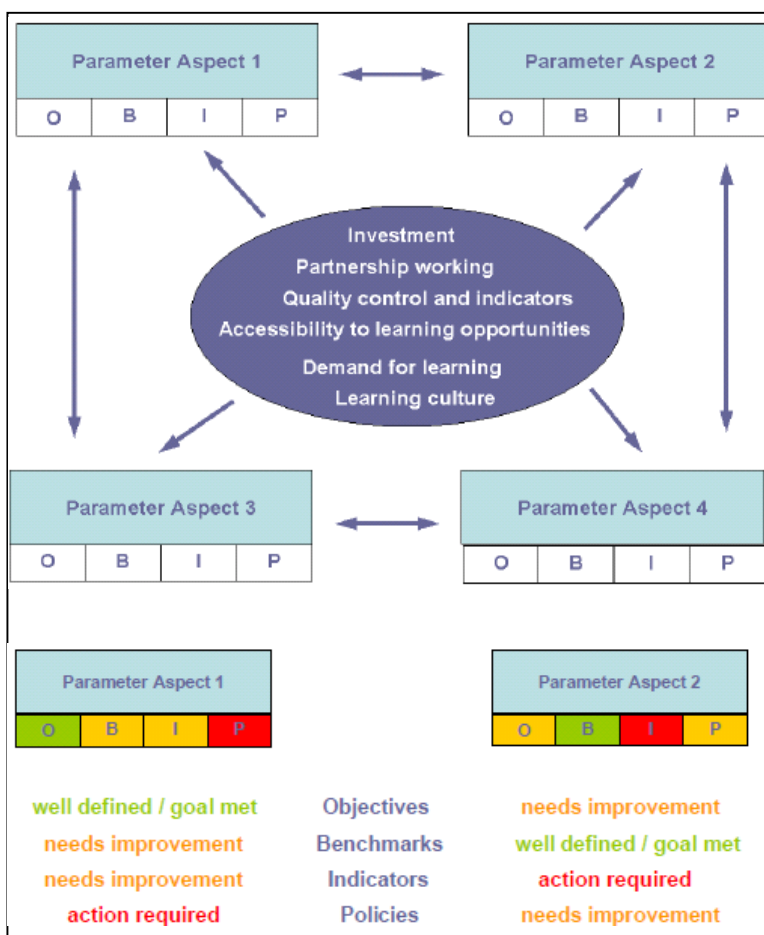
<sup>2</sup> RSS 2.0 Specification, see <http://cyber.law.harvard.edu/rss/rss.html>



learning related issues, but it fits the general image of networking activities observed for Germany: only single people show interest and lively discussions have not yet developed. Also, starting a new forum from scratch and establishing a vivid discussion is rather challenging, especially if the time frame is limited to the project runtime. We conclude for future establishment of education related knowledge sharing and discussion to either use the blog format or – which might even be more effective – to approach existing platforms (online and offline) and start discussions by using the already existing structures and networks. It might proof valuable to engage those people who already show interest in lifelong learning related discussions: they can contribute to the topics and also share the information in their existing personal networks. In general, it will be important to raise the awareness for controversial lifelong learning issues, and motivate experts – people who work in the field of continuing education either as practitioners or policy makers – to participate in discussions and develop their perspectives on opportunities for improving lifelong learning strategy implementation and evaluation.

### 5. Assessment of Lifelong Learning in Germany

In the course of the EFELSE project, an instrument for evaluating the implementation of the European lifelong learning strategy in one country has been developed. This EFELSE Tool<sup>3</sup> can be applied for the evaluation of lifelong learning strategy implementation according to the six parameters „demand for learning“, „investment in continuing education“, „accessibility to learning opportunities“, „creating a learning culture“ and „quality control and parameters“.



First, the tool application includes analysing the status of objectives, benchmarks, indicators and policies for lifelong learning, as was done in the EFELSE “State-of-Affairs Report Germany Part I”. It showed that the German lifelong learning strategy is already well developed with regard to its comprehensiveness, but would need improvement on the coherence level, mainly due to the heterogeneity caused by the German Federal system.

In a second step, a refinement of this analysis is performed by visualising the actual implementation status with traffic light colours (see figure 5.1) and, thirdly, by identifying details of strength, weaknesses, opportunities and threats in a SWOT analysis (see section 2).

Figure 5.1. Visualisation of the status of lifelong learning strategy implementation.

<sup>3</sup> The tool can be downloaded from the EFELSE website at <http://efelse.iacm.forth.gr>

## Visualisation of the Status of Lifelong Learning Strategy Implementation

The strength of the German lifelong learning strategy is the comprehensive approach to increase the demand for and participation in learning by specific funding and investment schemes (e.g. continuing education savings plan, education cheques) and programmes that aim at improving the accessibility to learning opportunities for different groups (e.g. by special activities for unemployed people, for older workers, etc.).

Tables 5.1-5.3 show for each comprehensiveness factor the status of lifelong learning strategy implementation as was described in the “EFELSE State-of-the-Art Report Part 1”. Traffic light colours are used to visualise the status: **well defined / goal met**, **needs improvement**, **action required**.

### Demand for Learning

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Participation in LLL</b>	General objectives for increasing participation of adult learners are provided throughout the lifetime; specification of objectives for specific target groups, e.g. low qualified people	Germany makes progress towards the EU benchmarks of 12.5% participation rate of adults in LLL (AES) and has developed own benchmarks (e.g. 50% participation rate; BSW) Both benchmarks have not yet been met	Data for individuals and companies is recorded and reported regularly, e.g. in the Educational Report Germany, the BWS, or the AES, including formal, non-formal, informal learning, general and vocational education; only partial data on teacher participation available	Many programmes and activities aim at increasing participation rates, mainly based on financial incentive systems
<b>Outcomes of LLL</b>	Necessity of developing social, personal, cultural, civic and professional competences of adults, especially for older adults, the aim is to preserve existing competences; labour market needs are considered	Participation in the PIAAC survey is planned; national version of TALIS survey performed	Data on competence levels of the adult population and trainers is inconsistent and hard to retrieve; prognoses of labour market demands remain on a general level	Programs focus on the facilitation of specific competences, e.g. literacy; further programs need to be initiated on the basis of benchmarking results

Table 5.1. Status of Demand for Learning in Germany

**Investment in Lifelong Learning**

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Private investment by individuals</b>	Development of support and incentive systems; funding of education by education vouchers and education savings, taking into account needs of specific target groups	No specific benchmarks identified	German financial report for the education system, with a focus on public spending, but also investment by companies and individuals (Bildungsfinanzbericht)  Trend analysis of continuing education (Trendanalyse Weiterbildung), including CVTS data and BIBB data	Participants of vocational continuing education have several possibilities to receive funding of direct participation costs; focus on specific target groups; less financial support for general continuing education available
<b>Private investment by companies</b>	Development of support and incentive systems	No specific benchmarks identified		Companies profit from programmes that support individual participation in continuing vocational education; policies that increase spending by companies need to be improved
<b>Public investment of continuing education</b>	Development of support and incentive systems; funding of education by education vouchers and education savings	Spending 10% of the gross domestic product by 2015 for education and research; no focus on adult education		Public investment mainly aims at co-financing individuals' or companies' spendings; free vocational training mainly available in the context of courses by the Employment Agency

Table 5.2. Status of Investment in Lifelong Learning in Germany

**Accessibility to Learning Opportunities**

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Social Inclusion</b>	Development of target group-specific schemes to offer educationally deprived sections of the population easy access to continuing education.	Specific benchmarks are not provided; however, the participation rate benchmarks (see demand for learning) are related to the importance of facilitating access to learning opportunities	Target group specific participation rates available (BSW); e.g. by age groups, sex, migration background, region, qualification, occupational status  Indicators with regard to formal education system, as well as continuing education, and alternative education pathways available	Existing policies aim at increasing participation rates of special target groups, e.g. by implementing incentive systems for unemployed people or older people; focus on vocational continuing education
<b>Lifelong Learning</b>	Opportunities for learning must be improved throughout a persons life; attracting learners by incentives and removing of obstacles			Overall expert recommendations for the improvement of lifelong learning exist, however policy activities often remain on the level of model projects and need to be further advanced and overcome challenges caused by the federal system
<b>Human Resource Development</b>	The focus of the objectives above is mainly on vocational continuing education (or basic education); objectives would need to be more specific			

Table 5.3. Status of Accessibility to Learning Opportunities in Germany

The in-coherence is revealed in a lack of awareness for the importance of lifelong learning: a learning culture still needs to be developed among the majority of the German population, among companies and employers. Also, on policy level the focus is rather on the formal education system and less on non-formal and informal adult education. Coherence of lifelong learning is also complicated through the nonexistence of an overall quality assurance approach for adult education in Germany. Furthermore, partnership approaches focus on regional cooperation structures of lifelong learning stakeholders (e.g. the learning regions programme), and cooperation across states and on policy level is still a challenge.

Tables 5.4-5.6 show for each coherence factor the status of lifelong learning strategy implementation as was described in the “EFELSE State-of-the-Art Report Part 1”. Traffic light colours are used to visualise the status: **well defined / goal met**, **needs improvement**, **action required**.

**Creating a Learning Culture**

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Guidance and counselling</b>	General objectives aim at establishment of high quality education counselling, taking into account target group specific needs, learning dispositions, biographies, educational pathways; specific objectives for implementation missing	No specific benchmarks identified	BSW data on the demand for counselling and the actual use of counselling offers and continuing education data bases available, however not detailed enough, and not structured by target group characteristics	The government supports educational counselling in continuing education by measures to increase the quality and transparency of offers, but there is still need for improvement, and also raising the awareness for lifelong learning needs to be increased
<b>Diversification of learning provision and opportunities</b>	Reduction of age related barriers (e.g. physical problems, mobility barriers, low self-confidence of older learners); General objective to include disabled people in all aspects of social and public life (e.g. education)	No specific benchmarks identified	Information about existing barriers and the implementation of accessibility measures in training premises is not available	Several associations and laws support the integration of disabled people in all aspects of social and public life, including education; e.g. with a focus on equality in higher education and initial and continuing
<b>Valuing and rewarding learning</b>	Documenting informal learning activities is regarded important for a new learning culture; and also every formal qualification must offer opportunities for follow-up qualifications	Germany intends to implement the EQF/NQF by 2010; other benchmarks for valuing learning hardly available	The German report of the European inventory for the validation of non-formal and informal learning concludes that a variety of approaches for the recognition are introduced in Germany; however these approaches are mainly described and not backed-up with statistical data	A country wide recognition system has not yet been established, but education policy decisions aim at realising this future. Germany is proceeding in implementing the EQF/ NQF The Qualification Initiative aims at improving the transition between different education domains, focus on vocational and higher education

Table 5.4. Status of Creating a Learning Culture in Germany

**Partnership Working**

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Policy Formation</b>	<p>Development of networks for promoting LLL.</p> <p>Transitions between educational areas should be improved by close cooperation between schools, universities, companies; the cooperation should also include continuing education providers and institutions that support transition to retirement.</p> <p>Strengthen educational cooperation on the level of regions: increasing access to quality of and participation in LLL.</p> <p>Specific challenges caused by the structure of the federal system need to be taken into account.</p>	<p>No specific benchmarks identified</p>	<p>Partnerships and networks are implemented on a regional level, and single project reports are available.</p> <p>Data is not recorded, nor reported or compared on a national and aggregated level</p>	<p>Policy activities often remain on the level of model projects and need to be advanced and overcome challenges caused by the federal system</p>
<b>Implementation</b>			<p>Continuing education participation rates are available on Länder level; more detailed data is very heterogeneous, if available at all.</p> <p>Labour market outcomes of education refer to the effectiveness of formal education, mainly, and would need to be related to continuing education partnerships</p>	
<b>Institution Delivery</b>			<p>Information on the actual diversity of institutions which collaborate in the existing lifelong learning partnerships is not available, centrally.</p>	

Table 5.5. Status of Partnership Working in Germany

**Quality Control and Indicators**

Parameter Aspects	Objectives	Benchmarks	Indicators	Policies
<b>Quality Control (Procedures and Tools)</b>	Specific objectives for the development of quality assurance measures itself are not available	Participation in international comparison studies (e.g. PISA, PIAAC) is promoted/ planned in order to identify the performance status of the education system.	An education monitoring system has been established, a bi-annual education report is available (Bildungsbericht): it provides indicator based data on the conditions, processes, outputs and outcomes of education, and is complemented by regional and domain-specific reports and surveys. Several studies (although not annual) provide insight into some aspects of quality control and existing quality standards; and programme evaluation is performed for each pilot project in the area of education	The Basic Law regulates the cooperation of the Länder and the federal government in measuring the performance of the Regular continuing education tests are financed by the BMBF and a quality management system for continuing education providers was established; however, the focus of activities is on exemplarily testing and implemented by single providers only; an overall obligatory quality assurance approach is missing.
<b>Target Span (Participation and Training Provision)</b>	The overall objectives of the government's quality assurance measures (continuing education testing) is consumer protection on the continuing education market; more specific objectives need to be defined	Benchmarks on national/ regional level are only very specific and project related	Overall and aggregated data on the quality of training provision is provided in the educational report from the perspective of learners; objective indicators are hardly available. Data on the quality of training provision is recorded – if at all – on the level of education providers (e.g. participants assess the quality of training provision after the course)	Basic conditions for the establishment of a quality assurance systems are set (see above) and several policy activities specifically aim at increasing the participation in education (see demand for learning); however, the interconnection of both aspects needs to be improved

Table 5.6. Status of Quality Control and Indicators in Germany

## *Recommendations for Evaluation Activities*

Given the specific situation in Germany – with strengths in the comprehensiveness and weaknesses in the coherence of lifelong learning strategies – we recommend focusing evaluation activities on the aspects of “creating a learning culture”, “partnership working”, and “quality control and indicators” (Of course, the comprehensiveness factors should not be neglected for the benefit of coherence factors). This is supported by the views of the EFELSE interview partners on evaluating the lifelong learning strategy implementation (see interview results and SWOT analysis above). They revealed a need for evaluation on all levels, but with a focus on challenges caused by the federal system and lacking quality assurance approaches. It was pointed out by the policy makers, that any development can only be evaluated, if the differences within states are taken into account. It would therefore be necessary to develop indicators such as differentiated and target group-specific participation rates, the exploitation of programs, and the development of lifelong learning networking structures. Related benchmarks need to set realistic objectives, and adaptation to the requirements on federal and state level is required. It is also important to focus not only on vocational continuing education, as it is often the case in Germany, but also on other aspects of general continuing education and adult education. An institute for quality assurance on national level and agreement on an overall approach would be needed for the implementation and monitoring of such evaluation processes. The responsibility for quality assurance is not only found on the policy level, but also on the very specific level of the providers. The representatives of training institutions stated that they aim at providing good quality training for different target groups of learners and a quality according to the demand of the local labour market. Two aspects were revealed as basis for training provision: good marketing to attract learners and to raise their awareness for the need of lifelong learning, and reliable financial backing for training provision, often in cooperation with external partners and companies. In this respect, the need for quality assurance measures has to be embedded in the provider’s self-conception. Currently, the approaches are inconsistent, and too often, evaluation results do lead to consequences in training improvement.

Monitoring and measuring lifelong learning implementation requires a common understanding among all stakeholders, e.g. learners, training providers, the labour market and policy makers, on the general alignment of the lifelong learning strategy. The current discussion on the establishment of eight new lifelong learning indicators (see Council of the European Union, 2009; Deiss, 2009; BMBF/BIBB conference<sup>4</sup>) clearly shows that lifelong learning in Germany is part of an ongoing process on European level and is subject of constant change and development.

Therefore, we recommend to formulate a dynamic vision of areas which need to be improved and of new areas which might be identified in the course of time. The vision need to draw a precise picture of lifelong learning in Germany, focusing on desirable developments as well as on aspects that should be avoided. The formulation of visions, and the adaptation of these visions according to new developments and requirements of lifelong learning in Germany and on European level, would allow the specification, adaptation and integration of new objectives, benchmarks and indicators. It is strongly recommended to evaluate the measures that will be initiated to let the visions become reality. The EFELSE Tool introduced above support policy makers and training providers in this respect. The evaluation approach suggested by the EFELSE project is to be seen as tool which can only provide initial support and needs to be adapted and modified according to the actual developments and needs on the level of policy and training provision in Germany.

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<sup>4</sup> BMBF/BIBB. Fachtagung Neue Benchmarks in der EU-Bildungspolitik 2010 – 2020



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