



# The evolution of EU lifelong and adult learning policies and their monitoring instruments

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# Defining the scope (terminology)

- *Lifelong learning*
  - An “activity” concept with broad coverage
  - Often synonymous with “Education and training”
  - 1990s and 2000s,
- *Adult learning*
  - An “activity” concept with narrower coverage
  - Late 2000s until now
- *Skills*
  - A “quantifiable” and “segmentable” concept
  - Since 2015

# Defining the focus (perspective)

- *Conceptual framework*
  - System perspective (stock/flow)
  - Market perspective (supply/demand)
  - Financial (investment/returns)
  - Transformation (input/output)
- *Coverage*
  - System level (descriptive)
  - Policy/Intervention level (prescriptive)
- *Measures*
  - Monetary (investment; returns)
  - Non-monetary (inputs; outputs; outcomes)

# Existing frameworks

- *Skills system*
  - OECD/WB/ILO/UNESCO/ETF (~2013)
  - European Commission (DG EMPL/Eurostat) (2016)
  - CEDEFOP European Skills Index (2018)
- *Adult learning system*
  - OECD-INES (2013)
  - OECD-ELSA (2019)
- *Adult learning policy*
  - European Commission (DG EMPL) (2015)

# Policy context

- *European Union: a supra-national and intergovernmental organisation*
- *Legislative power depends on policy area*
- *Limited legislative power in the fields of education or employment policy; but historically more pronounced in the area of vocational training policy*
- *Main legislative tool: non-binding "Recommendations"*

# Indicators/targets as a policy tool

- *In 1990s – introduction “management by objectives” in employment policy*
- *In 2003 – first education-specific targets*
- *In 2009 – an elaborated framework of indicators and benchmarks*
- *Monitoring instruments developed to support these policy initiatives*

# Lifelong learning (LLL) benchmark

- *Adopted in 2003*
- *Defined as share of individuals 25-64 participating in learning in a period of last 4 weeks prior to the survey interview*
- *Target value to be achieved by 2010 - 12.5%; no country should be below 10%*
- *Starting value in 2002 – 8.6%*
- *Highlighted the need to improve the measure*

# Evolution of data collection tools

- *Participation in LLL during 4 weeks, available in EU labour force survey (LFS) since ~1995*
- *Introduction of continuing vocational training survey (CVTS) from 1999 (piloted in 1993), repeated in 2005, 2010, 2015, 2020..*
- *LFS ad-hoc module on LLL in 2003*
- *Adult Education Survey (AES) from 2007, repeated in 2011, 2016, 2022..*
- *Major revision as of 2022 (LFS, AES)*



## A quick picture of AL in EU

- *Participation rates: 11% with 4 week reference period; 45% with 12 month reference period*
- *80% of all participants in at least one job-related training activity*
- *30% of all participants with at least one non-job related learning activity*
- *20% of participants contribute financially*
- *60%-80% of all expenditure made by employers*

## Status in early 2010s

- *Lack of progress in participation as measured in the LFS (from 8.6% in 2002 to 11.1% in 2018)*
- *Lack of more in-depth understanding of reasons for limited progress*
- *Need to provide countries with policy levers to assist in deployment of their policies*

# Moving beyond descriptive evidence

- *Evidence about "what" and "how-much"*
  - Statistics (surveys, administrative data);
- *Evidence about "why" and "how-to" – ideally experimental, but primarily qualitative analysis*
  - Academic research (in particular **meta-reviews**)
  - Policy analysis (including by Commission and OECD)
  - Policy maker's know-how
- *Combining these two approaches: the case of EC adult learning monitoring framework*

# Development and implementation

- *Development stage (2013-2015): literature review; defining intervention logic; consultations; mapping research and indicator availability*
- *1<sup>st</sup> stage of qualitative analysis (2016-2018)*
- *2<sup>nd</sup> stage of quantitative analysis (2018-2020)*
- *Adoption as an official benchmarking framework in 2018, to be used for country analysis*
- *To be applied for planning and impact assessment of EU financing programmes*

# Applicability of statistical indicators

Success factors for effective adult learning policies=increased participation

1. Stimulating individual demand for adult learning
2. Enhancing access to learning for disadvantaged groups
3. Encouraging employer investment in adult learning
4. Improving the relevance of adult learning for everyone involved
5. Assuring the quality of adult learning opportunities
6. Coordinating adult learning policies at national, regional and local level

# Limits of EU AL policy: recent findings

- *3/4 of countries have national target(s) on AL*
- *Often lack of clear rationale behind target value or explicit strategy how to achieve the set target*
- *Regular monitoring available only in around 1/2 of EU MS, systematic follow-up of monitoring only in few countries*
- *Lack of clear picture on financing AL, particularly given limited public sector investment*
- *Key policy weaknesses – poor use of data, little emphasis on learners' needs; policy alignment*

## Lessons learned (I): on policy

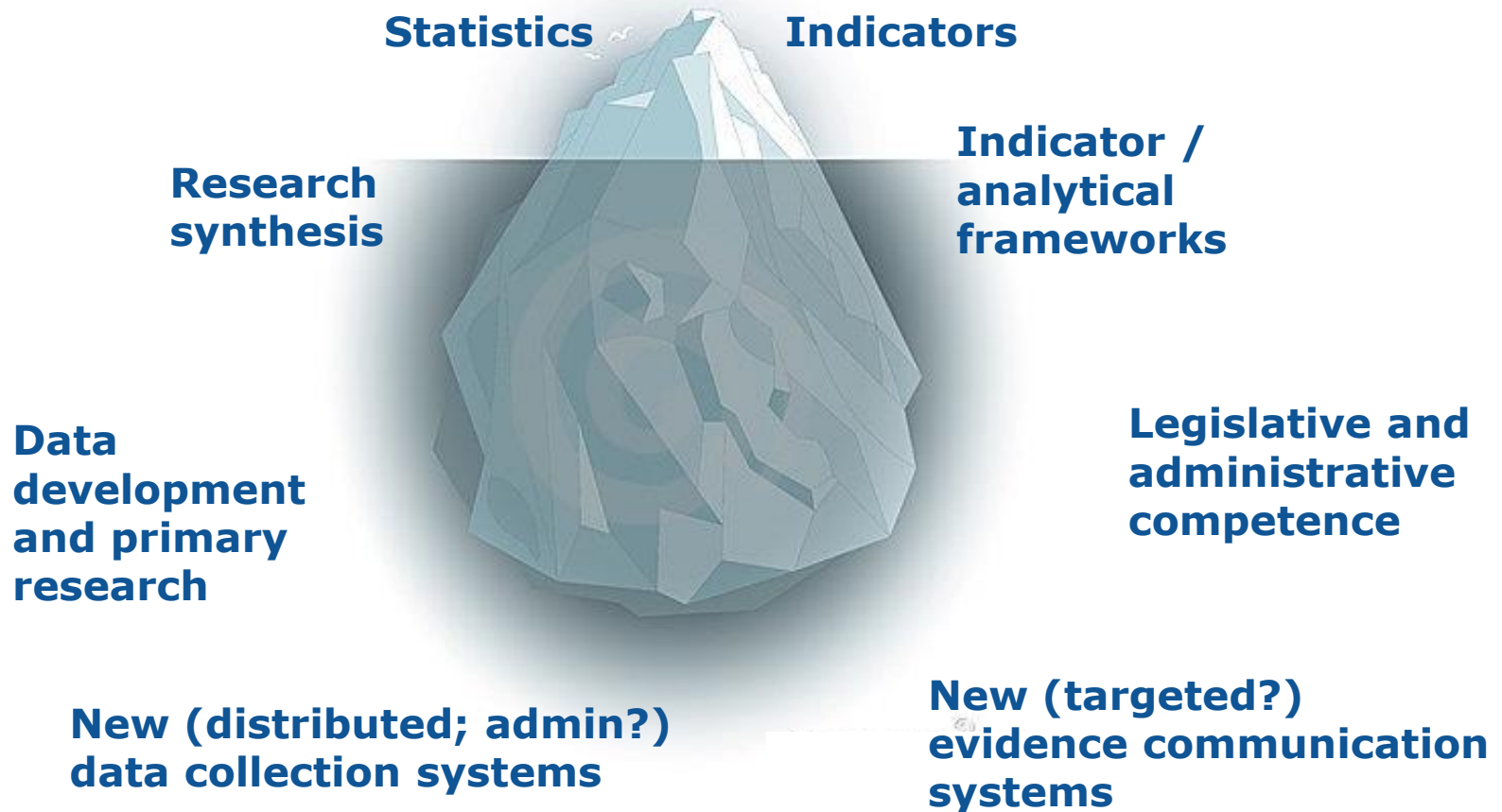
- *Monitoring systems in EU tightly related to their mandate – policy framework*
- *Functioning of policy intervention in adult learning as a predominantly private system*
- *Going beyond supply-side perspective(?): explore more the role of work organisation and business models; role of learning and returns to learning*
- *Ultimately – is there a broader function of adult/lifelong learning beyond employer sponsored, job-related training?*

## Lessons learned (II): on monitoring

- *Indicator-based monitoring does not ensure (coherent) policy implementation*
- *Structured collection of qualitative data can significantly enhance impact*
- *However, very time and resource intensive to implement at a cross-national level (even in such a homogenous region as EU)*
- *Ultimately – a question how to enhance impact of evidence in policy communication and deliberation*



# Conclusion: evidence ecosystem “iceberg”





# Thank you!

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# Analytical framework

