



# Links between flexicurity and workplace learning: the role of the enterprise

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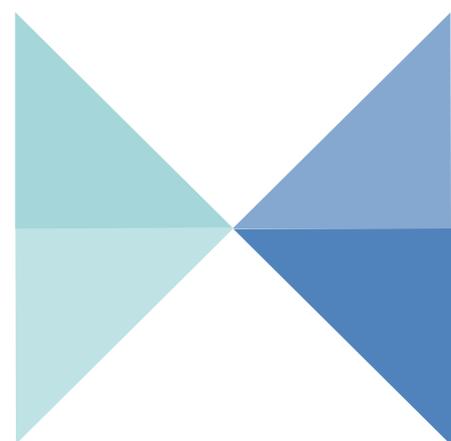
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# IMPRESSUM

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# LINKS BETWEEN FLEXICURITY AND WORKPLACE LEARNING: THE ROLE OF THE ENTERPRISE

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## EXECUTIVE SUMMARY

At the March 2006 European Council the European Union (EU) Member States agreed to introduce reforms in their employment and social policies under an integrated flexicurity approach. At present, this approach continues to define the labour market restructuring element of the European Employment Strategy and constitutes a basis upon which political action contributing to the achievement of the 75% employment rate target set by the Europe 2020 Strategy is coordinated.

Flexicurity at the EU level includes giving recognition to the need to invest in lifelong learning for workers. With a focus on skilling, reskilling and upskilling, lifelong learning is understood to play a key role in securing employment and in ensuring an adequate adaptation of companies to rapid change of business circumstances.

In this context, the interplay between initiatives and funds for lifelong learning coming from the state (or territorial employment or education and training departments or authorities), employers and (to a less extent) individuals is expected across the EU. Such interplay is a crucial component of the construction of flexicurity policy paths towards the implementation of lifelong learning strategies in enterprise working environments.

This report seeks to contribute to knowledge of the experiences and practices of enterprises in relation to the formation and effectiveness of these policy paths. With reference to original research conducted within the framework of the LLLight'in'Europe project focused on how companies interact with their public policy environments in relation to lifelong learning, three specific areas were selected for analysis:

- **Public policy.** How does public policy support participation and investment in lifelong learning by companies and their employees?
- **Partnerships and networks** in which companies connect with education, training and R&D providers and non-governmental organisations (NGOs). How do they contribute to developing and supporting lifelong learning opportunities within and around companies?
- **Circumstances affecting lifelong learning in the workplace.** How does the interplay between external and internal business circumstances result in the privileging or exclusion of particular forms of engagement and investment in lifelong learning in specific companies?

The research informing this analysis centred on the development of fourteen case studies in and around the working environments of companies based in Denmark, Germany, Italy, Slovakia and Spain. Of the fourteen companies considered, five have over 250 employees, five between 50 and 250 employees, and four fewer than 50 (including one with fewer than 10).



Investigations for the case studies involved the conduct of semi-structured interviews with company managers and staff as well as government representatives and other actors networked with each of the fourteen companies on focus. In total, 67 semi-structured interviews were conducted during field trips to the company locations where possible, otherwise by telephone. The research also drew on comprehensive documentary analysis aimed at gaining insights on important contextual aspects shaping lifelong learning in these companies such as national legislation, practices of tripartite corporatism and professional regulations.

## **Public policy**

Data on public policy support for workers' participation in lifelong learning in Denmark, Germany, Italy, Slovakia and Spain show a diverse array of government funding schemes and institutionalised mechanisms that are especially aimed at promoting training and skills development for employees in the private sector.

Except for Slovakia, employees can directly benefit from state support via tax relief provisions that incentivise individual investment in continual education and training. Moreover, collective agreements among governments and social partners and social partners themselves play a critical role in Denmark, Italy and Spain in facilitating employees free of cost access to training opportunities independently of the initiative and capacity of their employers to invest in lifelong learning.

In all of the five countries, there are governmental programmes and legislation ensuring the allocation of public funds for supporting companies' investment in lifelong learning for their employees. Funds are most generally allocated indirectly via tax incentives, participation of governments in collective agreements and specific regional programmes focused on employment and industrial development.

In our study, 13 out of the studied 14 companies were members of at least one association representing their interests as private enterprises/employers in the industry and through this membership they evidenced to have good access to accurate information about how the allocation of these public funds works for them. However, the data show that there is neither a strong reliance nor appreciation on the part of companies regarding the current subsidisation of their staff development initiatives. In this respect, among companies there is uncertainty about the effectiveness of the current public policy measures focused on encouraging lifelong learning in the workplace, with the following similarities being found across companies located in different countries.

- Publicly subsidised work-related training provision is perceived as not generally meeting the specific lifelong learning needs of staff. This is especially the case in knowledge intensive and innovation-oriented working environments.
- Utilization of public policy provisions and funds in the areas of education and vocational training as well as of innovation and R&D entails the experience of generating relevant lifelong learning opportunities for employees.

- Regulation of professions such as architects and health and social care professionals create lifelong learning needs and cause significant impact on ensuring the implementation of training and staff development plans by companies.

Overall, these are key findings that unveil that lifelong learning plays an important support function across a wide range of activities and that can be strengthened in enterprise working environments almost accidentally by policies targeting other issues than workforce training and development.

## **Partnerships and networks**

There is plenty of research-based evidence that social networks affect the lifelong learning of individuals. In the LLLight'in'Europe project, we investigated how far this is also true of business enterprises focusing on partnerships and memberships with education, training and R&D providers and NGOs.

With reference to accounts of the experience of engagement in these kinds of interactions, companies demonstrate to be better positioned to take advantage of the lifelong learning opportunities available to them, with the following observations being key findings in this regard.

- Participation of companies in arrangements for facilitating apprenticeships and traineeships for students in public (higher) education institutions helps generating mutually beneficial knowledge exchange and skills development dynamics.
- Companies' involvement in NGOs and professional networks facilitates participation in highly valued peer-to-peer learning and knowledge transfer activities. It contributes moreover to a better identification of education and training needs in accordance with business development needs.
- For small and medium size companies, membership to specialized NGOs can be a mechanism for encouraging the development of Human Resources (HR) management expertise within the enterprise.

Although a common trait in these relations is the absence of a commercial transaction, our case study research provides a range of examples when companies exploit their engagement in partnerships and networks for the purpose of achieving competitive and business advantages as well. From a policy perspective, evidence presented in this report draws particular attention to how partnerships between companies and public education institutions can entail risks in relation to the use of those institutions as facilitators of company strategies for marketing their products.

## Circumstances affecting lifelong learning in the workplace

A focus on the relationship between internal and external circumstances encouraging lifelong learning within specific companies helps gaining an insight on the relative role that public policy and public economic incentives can actually play in shaping employers' investment and employees' attitudes towards lifelong learning.

The analysis in this report systematically highlights the following aspects that emerged when interviewing company managers and staff across Denmark, Germany, Italy, Slovakia and Spain.

- High skilled requirement and high skilled outputs shape the approach to lifelong learning in companies that develop project and research-based products and services. This is marked by a preference for informal learning activities, which require less investment. Public policy plays no influence in engagement in informal learning within companies.
- When there is a HR function that deals specifically with training needs, professional development and lifelong learning are strategically driven by the company. In this case, public policy exercises little or no influence. Company management evidences an acute sense of how to foment lifelong learning opportunities for their employees.
- Professional regulations can constitute a critical external intervention in how participation in lifelong learning is managed at the company level. However, when they affect highly skilled employed individuals, they are prone to being perceived as generating training obligations that do not correspond to actual learning needs.

While the study encountered various motivations driving companies' promotion and investment in lifelong learning, the above observations are based upon a sectorial analysis that helps differentiating the kinds of learning that are valuable in accordance with the service/product provided and the professional knowledge and skills required. This differentiation is of relevance for identifying commonalities in a diverse and changing industrial landscape. And it contributes to gathering evidence that is helpful for adjusting public policy programmes to real lifelong learning needs in the private sector.

## Conclusions

The adoption by EU Member States of a flexicurity approach to employment and social affairs encompasses a significant interest in political circles about how to (re)construct policy environments that facilitate both employees' continual engagement in qualifying for employment and employers' continual ability to keeping on being successful in the running of their businesses. Either way a focus on the right skilling, reskilling and up skilling of the workforce is on the agenda.



Drawing on the available data collected in the course of implementation of the LLLight'in'Europe project, the study presented in this report offers some key messages of particular interest for policy-makers within the EU.

- Lifelong learning matters for the impact of policies across many areas. When planning, it is important to be aware that encouraging lifelong learning among key groups may make the difference between success and failure.
- Investment in educational and training programmes that encourage partnerships with companies and build lifelong learning within companies is recommended. However, the role of the state as a regulator of this kind of partnerships is highly important for addressing the risk of specific business interests dominating these relations.
- When allocating public funding for vocationally related lifelong learning, consider that a number of companies and employees in some sectors may invest in training without public subsidy. It is critical to gather information about whether it is cost-effective to support through public funds what individuals or enterprises would pay for themselves anyway.
- Importantly, and to conclude, the various factors that drive lifelong learning in companies remain only partially understood. More research is needed to investigate these. Research is also needed to identify gaps in learning when the focus of lifelong learning is product-driven or business-driven. Such research will increase efficiency in the allocation of public funds for lifelong learning.

## ACRONYMS

BMBF	Bundesministerium für Bildung und Forschung (Federal Ministry of Education and Research)
CEDEFOP	European Centre for the Development of Vocational Training
EU	European Union
IT	Information Technology
ICT	Information and Communications Technology
MŠVVŠ SR	Ministerstvo školstva, vedy, výskumu a športu Slovenskej republiky [Ministry of Education, Science, Research and Sport of the Slovak Republic].
MPSVR SR	Ministerstvo práce, sociálnych vecí a rodiny Slovenskej republiky [Ministry of Labour, Social Affairs and Family of the Slovak Republic].
SMEs	Small and medium enterprises



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## 1. INTRODUCTION

At the March 2006 European Council the European Union (EU) Member States agreed to 'pursue [...] reforms in labour market and social policies under an integrated flexicurity approach' (Presidency Conclusions, p. 42). The agreement was followed by the European Commission's outline of a set of common principles of flexicurity to be used by Member States together with social partners<sup>1</sup> as a reference when designing and implementing their flexicurity policies with the view of achieving 'more open and responsive labour markets and more productive workplaces' (European Commission, 2007, p. 9). At present, these principles continue to define the flexicurity element of the European Employment Strategy and constitute a basis upon which political action contributing to the achievement of the 75% employment rate target set by the Europe 2020 Strategy is framed.

The flexicurity approach adopted at the EU level strongly emphasises the need to invest in the creation and implementation of lifelong learning schemes for workers. With a focus on skilling, reskilling and up skilling, lifelong learning is understood to play a key role in securing employment and in contributing to an adequate adaptation of companies to rapid change of business circumstances. In this context, wider and greater participation in work-related lifelong learning are developments benefitting both public and private interests. In this respect, the interplay between initiatives and funds coming from the state (or territorial employment or education and training departments or authorities), employers/companies and (to a less extent) individuals is therefore expected. Such interplay is indeed a crucial component of flexicurity policy paths towards strengthening lifelong learning in working environments in conceptual as well as in pragmatic terms.

Drawing on original, in-depth case study research conducted in the process of implementation of the FP7 project Lifelong Learning, Innovation, Growth and Human Capital Tracks in Europe (LLLight'in'Europe), this report explores the experiences and dynamics of formation and enactment of these policy paths. In doing so, it focuses on the question: how do public policy environments can be (re-)constructed to encourage lifelong learning opportunities within or by companies based in the EU?

<sup>1</sup>The term 'social partners' is used in this context and in this report to refer to bodies representing the two sides of industry - the employers (industry associations, associations of small and medium size enterprises, chambers of commerce, professional associations such as chambers of architects and including associations of self-employed workers) and the employees (most notably, trade unions).

## 1.1 Context for the report

### 1.1.1 The concept of flexicurity

The concept of flexicurity was coined as a junction of flexibility and security in the process of implementation of a substantive legislative and labour market policy reform in the Netherlands in the second half of the 1990s (Wilthagen, 1998). It emerged to convey that the governing of this reform was based upon the idea that introducing employment policies that favour employers' flexible use of labour needs to go hand in hand with a revision of social (security) policies which addresses in a timely manner the (negative) consequences of flexible employment for the workforce.

In the Dutch case as in much of the discussion about contemporary labour relations in the advanced industrial world, the flexibility component of the concept of flexicurity refers to the notion that political action needs to be taken in relation to 'all sorts of regulations that enforce out-dated standards of the employment relationship' (Schmid, 2010, p. 3). Such 'standards' constitute what is often described as 'typical' employment, that is to say dependent full-time work on an open-ended contract, which conventionally contains job protection, clearly stated functions, income security and fixed working time clauses.

In opposition to these 'standards', several flexibilities are promoted: a) numerical flexibility – it becomes easier to hire and fire employees; b) functional flexibility - employees can be used for different work tasks; c) wage rate flexibility – employers can adjust wages according to changes in market conditions; and d) working time flexibility – including flexible work schedules but also an increase in part-time work, temp-agency work and other kinds of partial employment (Jensen, 2011). Taken together, these various forms of flexibility are claimed to allow labour markets in general and individual companies in particular to adapt on an adequate speed to changing business conditions and therein to maintain and enhance competitiveness and productivity (Wilthagen and Tros, 2004, p. 6). From a macroeconomic perspective, it is further argued that the extending of flexibility in labour relations and work organisation is a determinant of GDP growth (Schmid, 2010, p. 41).

However, the pursuit of strong competitiveness, enhanced productivity and GDP growth through an exclusive focus on the transformation of the institutions that formerly restricted the use of flexible labour encompasses critical questions about social welfare. For example, how does a socio-economic and political environment that promotes toleration for high job insecurity, volatile income and precarious work conditions can contribute to individual as well as societal well-being? To a large extent, the security element of the concept of flexicurity gives recognition to this question by sustaining in the first place a shift in the conception of employment from the workers' viewpoint.



Taking the case of the legislative and labour market policy reform in the Netherlands in the 1990s, Wilthagen emphasises that the concept of flexicurity 'pertains to a shift from security within a job towards security of a job, a shift that in its turn is strongly related to changes in the economy and households and to the emergence of a corresponding flexible system of social security' (1998, p. 2). The European Commission puts this idea in a slightly different way: "Individuals increasingly need employment security rather than job security, as fewer have the same job for life" (2007, p. 3).

From this standpoint, it is broadly understood that individual workers are (or ought to be) committed to remain 'employable' and willing to 'adapt' to new job circumstances over their life course. The role of the state is in this case to review its social policies so as to ensure a degree of (social) security that facilitates the 'careers and biographies of workers with a relatively weak position and allows for enduring and high quality labour market participation and social inclusion' (Wilthagen and Tros, p. 6). As some other authors note, it is also to engage in an active labour market policy that promotes and facilitates workers to upgrade their skills and qualifications within an 'employability' perspective (Overbeek, 2003, p. 27).

For Heyes, the overall aim of active labour market policies is to improve workers' ability to make labour market transitions (2013, p. 72). This includes not only access to lifelong education and training opportunities but also having in place an unemployment benefit system which secures the income of workers during 'transitional' unemployment phases. Access to child care and elderly care services is another component of social security often mentioned in the debate about flexicurity as these services are perceived as easing the transition of especially women into the labour market.

To be clear, the notion of 'labour market transitions' conveys a conception of working life as being constituted by a continual movement from employment to unemployment and back again to employment, from unemployment to education and training, from education and training to employment, from one occupation to another, from employment to retirement, and so forth. It is indeed from this viewpoint that flexicurity has been accurately described to be premised on the assumption that 'flexibility and security are not contradictory to one another, but in many situations can be mutually supportive' (Madsen, 207, p. 525).

### 1.1.2 Governing flexicurity: the emphasis on lifelong learning at the EU level

As above mentioned, the concept of flexicurity was adopted in 2006 and integrated in the European Employment Strategy as an approach to simultaneous policy change in the areas of employment and social affairs. This approach is defined by the following four principles which function at the same time as inextricably linked guidelines for the development and coordination of flexicurity policies across the EU Member States (European Commission, 2007, p. 5):

- Flexible and reliable contractual arrangements established through labour laws, collective agreements and work organisation with the active involvement of social partners;
- Comprehensive lifelong learning strategies aimed at promoting adaptability and employability of workers;
- Active labour market policies which support people to deal with rapid change, to reduce the duration of unemployment and to transit to new jobs;
- Modern social security systems that encourage employment whilst providing for income support (unemployment benefits and pensions) and healthcare and childcare services.

In many respects, these four principles are a synthesis of the conception of flexicurity in the literature outlined in the previous section. However, it is interesting to observe that lifelong learning, generally defined at the EU level as 'all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective' (European Commission, 2001, p. 9), is introduced in this context as an issue that is separated from the other common principles of flexicurity. The three other principles constitute what some authors describe as being the 'golden triangle of flexicurity' (Bredgaard et al., 2009, p. 9).

### 1.1.3 The governance of lifelong learning from a flexicurity perspective

The European Commission's highlighting of lifelong learning as a different flexicurity principle can be argued to stem from a line of reasoning where lifelong learning linked to labour market restructuring is seen to pertain to a 'grey area' of governance.

To be clear, indeterminacy about the governance of active labour policies and of the envisaged transformation of social security systems (where encouraging and financially supporting participation in lifelong learning can also be part of an agenda, especially when the focus is on unemployment and the low-skilled workforce) is somehow non-existent. The state is understood to have exclusive competence to govern these areas. Even if a mode of governance directed towards reaching consensus among representatives of governments, employers and employees is the most preferable in a flexicurity approach, they are clearly areas in the domain of public policy (see European Commission, 2013). They concern social welfare and more broadly the protection of social rights recognised in many of the liberal democratic constitutions of EU member countries.



But lifelong learning is not in the clear domain of public policy. It is not so particularly when discussed as an investment in the skilling, reskilling and upskilling of enterprises' human resources that contributes to enterprises' responsiveness to new business circumstances and market competitiveness. In this discussion, indeterminacy about the governance of lifelong learning arises from the fact that enterprises may expect a private return when developing their own training and professional development strategies. Employees may also be depicted as individuals who see access to work-related lifelong learning opportunities as contributing to their own interest in qualifying for employment over time.

The agreement among EU Member States is that the consensus to be reached about this issue should be based upon the recognition that responsibility for the governing and costing of lifelong learning opportunities at companies is co-shared among governments, employers and individuals (Council Decision of 21 October 2010, p. 50; see also European Commission, 2007, p. 6).

However, like the other common principles of flexicurity, the question of how to create and implement comprehensive lifelong learning strategies is to be resolved within the contextual specificities of each EU Member State. The competence of the EU in relation to employment and social policies is limited to that of steering coordination on the basis of an agreement among Member States and European level stakeholders about a common strategy for governing labour markets. In this case the common principles of flexicurity, including the principle of investing in lifelong learning at the enterprise level, constitute what the European Commission states: 'a toolbox for national governments, social partners and other stakeholders to use when designing their own flexicurity approach' (2007, p. 3). Adaptation and variegation can therefore be expected.

## **1.2 About the research informing the report**

### 1.2.1 Objectives

One of the research objectives of the LLLight'in'Europe project was to generate an empirical basis upon which guidance on investments in lifelong learning can be provided. The link established between lifelong learning and flexicurity in the European Employment Strategy suggests that there is an agreement amongst EU Member States that these investments are needed for securing market competitiveness as well as employment. And that these investments ought to originate from a combination of activities and resources allocation undertaken by public institutions, companies and individuals.

Yet, there is little research-based evidence to guide the dynamics of combined investments in lifelong learning and their actual impact on (human) capital generation and therein on their contribution to an enhanced rate of economic growth and employment within the EU.



This report seeks to contribute to greater knowledge on these questions by focusing on how public policy environments can be (re-)constructed to encourage lifelong learning opportunities within or by companies. The notion of ‘public policy environment’ includes a range of institutions such as employment law, recognition of union rights, practices of tripartite corporatism, education and vocational training providers in the public sector, R&D policy, that may shape the competitive advantage of national economies in general and of individual companies in particular (Porter, 1998).

The experiences of individual companies’ interaction with their public policy environments in relation to lifelong learning are explored taking into consideration three areas:

- **Public policy.** How does public policy support continual participation and investment in lifelong learning by companies and their employees?
- **Partnerships and networks** in which companies connect with education, training and R&D providers and non-governmental organisations. How do they contribute to developing and supporting lifelong learning opportunities within and around companies?
- **Circumstances affecting lifelong learning in the workplace.** How does the interplay between external and internal business circumstances result in the privileging or exclusion of particular forms of engagement and investment in lifelong learning in specific companies?

These three areas have been chosen for investigation because they are still evolving in terms of their intrinsic relationship between one another. There is evidence that they together form policy paths towards strengthening lifelong learning in working environments but there are also indications of recent initiatives by governments of EU countries affecting the allocation of public funds for employers’ associations and unions’ not-for-profit lifelong education and training provision. In general, how policy change in the fields of education and vocation training alter the flexicurity logic of securing the renewal and upgrading of skills for all workers is yet to be the subject of focused research.

## 1.2.2 Activities

The research followed a ‘policy trail’ method. The method involves combining analysis of national legislation and policy initiatives with the results of case study research in and around companies.

Fourteen case studies were developed by taking fourteen companies as the point of departure to the following of a ‘policy trail’. This comprised three major activities conducted between July 2012 and May 2015:

- Identifying aspects of public policy related to lifelong learning with which the studied company interacts through document analysis;
- Mapping and developing an account of actors and institutions affecting directly and indirectly the provision and investment in lifelong learning within the company. Namely, trade unions, professional associations, industry and employer bodies, specific government agencies, and education, training and R&D providers;
- Interviewing managers and other staff members of the company as well as other actors identified in the above mentioned process of mapping. In total, 67 semi-structured interviews were conducted during field trips to the company locations where possible, otherwise by telephone/Skype.

The fourteen case studies resulting from this research process consider enterprises located in Germany (7), Spain (4), Denmark (1), Italy (1) and Slovakia (1). Of the companies considered, five had over 250 employees, five between 50 and 250 employees, and four fewer than 50 (including one with fewer than 10). Regarding their sector of economic activity, two are positioned in the Architecture sector, one in Food and Supply Distribution, two in Health (and Social) Care, three in Industrial Production, four in the IT Industry, and two in Management Consulting and Business Training.<sup>2</sup>

For the sake of protecting privacy, this report does not identify the participant companies and individuals. The names of the companies are coded and the names of the interviewees and of the localities where interviews were held are not disclosed.

### **1.3 The structure of the report**

The following three chapters deal separately with the areas explored in the research upon which this report is based. Each chapter concludes by outlining key findings that have potential implications for future formulation of policies affecting lifelong learning in companies.

**Chapter 2** is the main part of the report. The analysis sets the scene at the national level by focusing on public policy provisions and funds aimed at promoting participation in lifelong learning for people employed in the private sector in Denmark, Germany, Italy, Slovakia and Spain. With reference to the flexicurity rationale informing these provisions and drawing on our case studies, the chapter provides evidence on how individual companies located in these countries manage and invest in their human resources' training and skills development. The particular aspect of divergences and convergences between what is intended in public policy and what (very often selectively) is achieved in practice in the working environment of each company is explored.

<sup>2</sup> A full account of the fourteen case studies and of the 'policy trail' method is provided in the publicly available LLLight'in'Europe report Case Studies Final Report -14 Lifelong Learning Policy Trails in Europe.



This helps pinpointing how and why governments' development (in some cases in collaboration with social partners) of a policy agenda centred on incentivising lifelong learning participation in company working environments can succeed or fail to cause impact.

**Chapter 3** presents evidence of the ways in which lifelong learning provision within and outside the company is influenced by interactions between companies and their environments, with particular reference to partnerships with (generally public) education and training and R&D providers as well as with non-governmental organisations. Case studies provide rich and detailed insights into how these kinds of connections are developed and tend to be influential in both directions: on the one hand, they enable companies to play a role in shaping policy in knowledge and skills development areas of their interest; on the other hand, companies become better positioned to take advantage of the lifelong learning opportunities available to them in their environment when they are well-networked. We also look at situations where business interests are dominating relations between education institutions and companies. Although this is not the norm, it needs to be understood as it has implications for how educational autonomy is being protected through regulatory mechanisms at present.

Finally, **Chapter 4** focuses on the relationship between internal and external circumstances encouraging lifelong learning at the enterprise level. By accounting for this relationship, the chapter presents evidence of the relative role that public policy and public economic incentives can play in shaping employers' investment and employees' attitudes towards fomenting employability through lifelong learning in the workplace. The analysis shows that in the case of companies that employ highly qualified professionals and develop project and research-based products and services there is less investment in training courses and more individual autonomous initiative to meet learning needs. What primarily induces lifelong learning in these companies is the engagement of individuals in doing their jobs. Professional regulations can constitute an external intervention in how participation in lifelong learning is managed at the company level. However, when they affect highly skilled employed individuals, they are prone to being perceived as generating training obligations that do not correspond to actual learning needs. This finding suggests that developing sectorial analyses would help differentiating the kinds of learning that are valuable in accordance with the service/product provided and the professional knowledge and skills required. Such a differentiation is of relevance for adjusting public policy programmes to real learning needs at the enterprise level.

## **2. PUBLIC POLICY AND LIFELONG LEARNING AMONG COMPANY EMPLOYEES**

### **2.1 Chapter focus**

This chapter reports findings contributing to a debate about what needs to be done to develop public policies, which really support lifelong learning in companies. The findings are based on the analysis of national legislation, government funding schemes and institutionalised arrangements supporting participation and investment in lifelong learning by companies and their employees in the countries where case study research in the LLLight'in'Europe project was conducted: Denmark, Germany, Italy, Slovakia and Spain. This analysis is combined with evidence from the case studies on how the company management of human resources' training and skills development interacts with elements of public policy in these countries.

Whilst the chapter does not aim to present a study of policy implementation, it offers important insights into how and why a policy agenda centred on incentivising lifelong learning can succeed or fail to cause impact on company working environments.

### **2.2 Variation across countries: an overview**

As elaborated in the following sections of this report, data on public policy support for workers' participation in lifelong learning in Denmark, Germany, Italy, Slovakia and Spain show a diverse array of government funding schemes and institutionalised mechanisms that are especially aimed at promoting training and skills development for employees in the private sector. To generally contextualise this diversity it is helpful to account in the first place for the main differences among these five countries with respect to their employment and social policy traditions. To this end, Table 1 below draws on the typology by Smith et al. (2012, p. 6) of 'flexicurity clusters' or 'regimes' in the EU. The typology is based upon a focus on employment protection legislation and social assistance provision in each cluster. In addition to these aspects, we include in Table 1 the prevailing form of public provision of lifelong learning available to company employees in Denmark, Germany, Italy, Slovakia and Spain.

Table 1. Public provision of lifelong learning for in each flexicurity cluster

<b>Nordic</b>	<ul style="list-style-type: none"> <li>- High security</li> <li>- Intermediate-to-high flexibility</li> <li>- Universal welfare provision, low job protection but high employment protection, high job-turn over, collective model with a high level of unionisation.</li> <li>- <b>Public provision of lifelong learning in close collaboration with social partners</b></li> </ul>	<i>Denmark</i>
<b>Continental</b>	<ul style="list-style-type: none"> <li>- Intermediate-to-low flexibility</li> <li>- Intermediate-to-high security</li> <li>- Insurance-based social benefits, stricter employment protection legislation, collective model with a trend to a decreased level of unionisation.</li> <li>- <b>Public provision of lifelong learning closely linked to education and training governmental authorities' initiatives and collaborations between industry and education institutions; also for some professions in close collaboration with social partners</b></li> </ul>	<i>Germany</i>
<b>Mediterranean</b>	<ul style="list-style-type: none"> <li>- Low flexibility</li> <li>- Relatively low security</li> <li>- Strict employment protection legislation for workers on open-ended contracts, social protection focusing on retirement/old age, low coverage of unemployment benefits.</li> <li>- <b>Public provision of lifelong learning in close collaboration with social partners</b></li> </ul>	<i>Italy, Spain</i>
<b>Eastern European</b>	<ul style="list-style-type: none"> <li>- Intermediate-to-high flexibility</li> <li>- High insecurity</li> <li>- Low levels of employment protection legislation, low level of social protection.</li> <li>- <b>Sporadic public provision of lifelong learning closely linked to government programmes and EU funds</b></li> </ul>	<i>Slovakia</i>

Importantly, the elements defining the flexicurity clusters in Table 1 are undergoing significant changes at present. There are indications that the current economic crisis affecting various EU member countries is bringing about cuts on social protection, including on unemployment benefits and public provision of lifelong learning. As Heyes notes (2013, p. 72), the 'austerity' measures that are being taken by various governments in the EU entail a weakening of social security which leads to an imbalance in flexicurity policies favouring labour market flexibility. This suggests a tendency that is reconfiguring what differentiates the 'flexicurity clusters' in Table 1 from one another.

In any case, the aspects highlighted in Table 1 contribute to a contextual understanding of some variation found in our in-depth case study research in relation to the governance of lifelong learning in the public policy environment of the 14 companies participating in our study:

- 13 out of the 14 companies, - the exception being the company based in Slovakia-, were members of at least one association representing their interests as private enterprises/employers in the industry;
- Through this membership companies evidenced to have good access to accurate information about public vocational education and training providers in their environment and about public funds they could use for developing lifelong learning in the workplace.

- Collective agreements among governments and social partners and social partners themselves play a critical role in Denmark, Italy and Spain in facilitating employees free of cost access to training opportunities independently of the initiative and capacity of their individual employers to invest in lifelong learning.
- Except for Slovakia, employees in Denmark, Germany, Italy and Spain can directly benefit from tax relief provisions when they individual invest in continual education and training.

When interpreting participation in continual education and training as a social benefit, the last observation can be understood as a reflection of the low level of social protection, which differentiates Eastern Europe from the remaining flexicurity clusters. The other three points entail some variation in relation to how structurally embedded collaboration with social partners in industrial relations is. As reported in more detail in the next section of this chapter, the data collected in our study show that in some cases the practice of tripartite agreements could be a crucial factor for companies' access to subsidised work-related and sectorial tailored lifelong learning provision.

## **2.3 How public policy really supports lifelong learning in companies**

Despite variation, there is a similarity found across Denmark, Germany, Italy, Slovakia and Spain. In all of these five countries there are governmental programmes and legislation establishing direct and indirect forms of financially supporting companies' investment in lifelong learning for their employees. In what follows, this is discussed per country and on the basis of what was identified as being the most relevant public policy initiatives and funds for the studied companies. The identification drew on interviews held not only with company staff but also with representatives of public authorities, trade unions and employers' and professional associations in the respective countries. Accordingly, the discussion is more or less comprehensive according to the number of participant companies in each country: 1 in Denmark, 7 in Germany, 1 in Italy, 1 in Slovakia and 4 in Spain.

### **2.3.1 Denmark**

As mentioned in Introduction, changes in employment and social policies in the Netherlands in the mid-1990s provided the input for the conceptualisation of flexicurity. However, Denmark is often described as the ideal example of flexicurity. Larsen (2005) for example argues that the EU's conceptualisation of flexicurity is close to the so-called 'Danish Model' – a corporatist model; a model that in turn is viewed as the end goal for the strategy of the EU (Bredgaard et al., 2009, p. 6). It should, however, be noted that flexicurity in Denmark is the historical outcome of social compromises within different policy areas and less of a deliberate strategy for establishing a flexible labour market.

### 2.3.1.1 The Danish Model and lifelong learning

As mentioned in Introduction, changes in employment and social policies in the Netherlands in the mid-1990s provided the input for the conceptualisation of flexicurity. However, Denmark is often described as the ideal example of flexicurity. Larsen (2005) for example argues that the EU's conceptualisation of flexicurity is close to the so-called 'Danish Model' – a corporatist model; a model that in turn is viewed as the end goal for the strategy of the EU (Bredgaard et al., 2009, p. 6). It should, however, be noted that flexicurity in Denmark is the historical outcome of social compromises within different policy areas and less of a deliberate strategy for establishing a flexible labour market.

Most questions relating to wage and working conditions are regulated through the Danish Model. In regard to lifelong learning, social partners have integrated the right to lifelong learning in collective agreements and hereby established that companies are obliged to provide their employees continual education and training on the one hand, and on the other hand that employees are obliged to take part in continual education and training. **Box 1** on Competence Development Funds illustrates how the institutionalisation of rights and duties in relation to lifelong learning is supported in this context.

#### Box 1. Competence Development Funds

The Competence Development Funds ((kompetencefondene) aim to foment and support workers' engagement in a form of self-directed and self-selected work-related lifelong learning. Within this scheme, employees and businesses can apply for grants for participating in continual education and training activities that are relevant to the employees' work.

The Competence Development Funds are based upon cooperation between social partners and established in accordance with collective agreements in the industry. It facilitates companies to finance participation in lifelong learning initiatives. Every employer agrees on paying a specific amount to a common fund. Employers pay for all full-time and part-time employees with more than 9 months seniority who are members of a trade union and therefore covered by the collective agreements. The annual contribution to the competence funds per employee varied according to the established collective agreements from DKK 400 per full-time employee up to DKK 820 in 2013.

Many of the funds in this scheme are administrated by kompetencefond.dk. At the kompetencefond.dk website, employees and enterprises can find information on subsidised education and training courses. It is first and foremost adult vocational courses, business degree courses and courses that strengthen employees' literacy and numeracy. The employee can apply for subsidies to cover not only participation fees but also materials to be used in the course, subsidy pay and transport. In turn, employers can apply for financial compensation from the funds if their employees partake in training or education outside the company.

Insofar as support for lifelong learning is framed in the dynamics of formulation and implementation of collective agreements, it is not strict sense a public policy. However, in this environment the state plays a crucial role in facilitating the institutional setting that enables collective agreements among social partners in general and agreements on lifelong learning in particular to succeed.

For one thing, collective agreements are legally binding and function in principle as a law. In case of disputes, the Labour Court will deal with the dispute. The Labour Court is not part of the ordinary Danish judicial system. But on the basis of the Labour Court Act, the Court has exclusive jurisdiction to deal with e.g. breaches of collective agreements on wages and working conditions. For other thing, in relation to lifelong learning, the state is governed according to public policies that ensure the allocations of funds for maintaining a comprehensive public education provision and the involvement of social partners in national committees and councils on adult education (see [Box 2](#)).

### Box 2. Facts about lifelong learning in Denmark

Although public and private adult education providers co-exist, there is a long-standing tradition for publicly provided adult education in Denmark. The Danish education system is characterised by a comprehensive public education provision covering all levels of education. Adult education in this system is divided into three subsystems: General Adult Education, Vocationally-Oriented Adult Education and Liberal Adult Education.

General adult education is offered at levels corresponding to the final three years of lower secondary education (General Education for Adults) and to upper secondary education (Higher Preparatory Examination).

Vocationally oriented adult education consists of labour market training and vocational education and training for adults, and it is also made up of basic adult education and further adult education, as well as Diploma and Master's level education.

Liberal adult education is aimed at increasing both general and specific knowledge, as well as promoting life skills. It is provided by adult education associations, day high schools and university extensions.

The boundaries between these subsystems have increasingly become less clear-cut. Nonetheless, their development has happened separately and there are differences in organisation and financial conditions, as well as different governmental affiliations (Marcella and Larson, 2009). Most of the institutions offering adult education are self-governing state institutions financed partly by the state and partly by tuition fees paid either by a local public authority, commissioning enterprises or by the participants themselves. Dependent on the fulfilment of certain conditions, participants may receive a National Adult Education Grant (SVU).

### 2.3.1.2 Policy interacting with companies: evidence from case study

There was only one Danish company participating in our case study research. But the case of this company, henceforth C8, provides an interesting example of how lifelong learning is integrated through the Danish Model into a working environment.

Company 8 (hereafter, C8) is an architectural firm established in Aarhus in 2000. Its primary market is Scandinavia, but C8 also competes internationally and has won several international prizes for its architecture projects. There are 70 employees at C8. However, the number of employees may fluctuate according to the number of project assignments. The responsibility for human resources management is delegated to the leaders of the four main teams of C8.

C8 is a member of the association DANSKEARK, an employers' organization. Employees are mostly Architect MAA (they have a degree in Architecture and are members of the Academic Association of Architects) or Constructor MAK (they have a degree as construction architects). As an architectural firm, C8 has to abide by two main collective agreements covering the core of its staff, i.e. architects and construction architects. Both agreements regulate the right to continuing professional development and have favourable conditions for employees in this respect. An employee in this case has the right to education and training equivalent to 2,400 Euros (18,000 DKK) per year. 75 per cent of this amount is to be used individually while the remaining 25 per cent goes to a common fund for education and training activities at the enterprise. Education and training activities in this framework have to be connected to the workplace, i.e. they have to be relevant for the employee's work and for the profitable activities of the company.

C8 meets the terms laid down in the collective agreements for architects and construction architects, namely by organising annual Employee Development Interviews (MUS – *medarbejderudviklingssamtaler*). They are held by the Heads of each team at C8 and serve the purpose of negotiating and deciding upon which education and training activities employees will participate in. The Association of Danish Architects has developed a competence development plan, which can be used as a guide when these interviews are held in companies. In this sense, continuing professional development is highly formalised in the Danish Model and evidently impacts on C8 management of lifelong learning for their employees.

However, in practice, interviews held with C8 staff suggest that Employee Development Interviews play a less significant role than the learning and training needs arising from the participation in specific projects. One of the team leaders of C8 says:

*We have these employee development interviews, which are there because of the unions. But the real competence development happens in the everyday working life if you ask me. It could be a new building material we want to know more about. Competences and skills have to be strongly connected to real work – otherwise you will just forget what you learned. (I35-HR-DK, 7/11/2013)*

The trade union representative at C8 agrees and reports: "If you want to develop your competences in a direction which does not fit with the competences needed by the enterprise it is more difficult". (I36-TU-DK, 7/11/2013)

Indeed, in the case of C8 the obligation to invest in lifelong learning for its employees is met in close connection with the projects that the company is carrying out. It also entails an alignment between how the company generates income and how certain forms of learning are encouraged. As C8's CEO explains:

*The way we try to win projects is by showing our excellence and this means showing the contractor the CVs of our employees. It is like playing car cards basically. It is important in order to win EU tenders, and Southern European enterprises have been better doing formal courses or similar which have been officially accredited. (I33-Dir-DK, 7/11/2013)*

The above interview excerpt contains a preference for the participation of employees in formal and certified training courses, which is adjusted, to the demands of competitiveness implied in tendering procedures of the EU. Succeeding in EU tenders is important for the market position of C8.

Formally, collective agreements do not establish that participation in education and training needs to lead to a formal qualification. However, the emphasis on CVs in EU tenders has strategically redirected investments towards the upgrading of CVs. A representative of the Architects and Designers' Union confirmed in an interview that this is as a trend in the industry: "Our members and the employers," says the interviewed representative of FAOD "are more focused on using the money on formal competences. There used to be more stories about travelling around the world" (I67-TU-DK, 18/05/15). The latter refer to a still existing option that employees have to use their stipend for education and training to travel for seeing architecture and therein informally develop as architects.

### 2.3.1.3 Key messages

The experience of C8 in relation to lifelong learning illustrates the following aspects of an interaction between a company and its employment and social policy environment.

- Collective agreements in Denmark constitute a powerful mechanism for enforcing workers' right to continual participation in lifelong learning by demanding companies to invest in their human resources and by shaping their management of professional development.
- Collective agreements create a setting that is also advantageous to enterprises as it ensures that employees engage in learning activities that are relevant to their work.

- Although it is a legal requirement to invest in lifelong learning, this requirement can be turned into an advantage when companies use it strategically as an opportunity to match the skills development of their staff and their own development needs as for profit entities.

### 2.3.2 Germany

In Germany, public lifelong learning policies affecting employees in the private sector are under the responsibility of the Federal Government and the 16 Länder (Federal States). The Länder have 'cultural sovereignty' over education, science and research. This means that they legislate on matters of education and culture and are responsible for regulating the functioning of vocational education schools and higher education institutions. The Federal Government regulates education through the Basic Law, including in-company vocational training, vocational further education, higher education, training assistance and the legal professions.

Cooperation between the Federal Government and the Länder on lifelong learning issues takes place through commissions such as the Commission for Educational Planning and Research Promotion of the Federation and Länder, which establishes agreements on education and training planning and funding (see Osborne and Bell, 2004). In 2008, in line with the flexicurity principles agreed at the EU level, the Federal Government adopted the 'Concept for Lifelong Learning' with measures aiming at expanding the offer of lifelong learning opportunities in cooperation with companies, with particular attention to small and medium-sized enterprises (BMBF, 2015).

Against this background, the main public policies promoting work-related lifelong learning on a national scale are laid out in [Box 3](#). Another dimension of public support for lifelong learning concerns taxation policy.

### Box 3. Legislative framework supporting work-related lifelong learning in Germany

In Germany, the following legislative initiatives and programme constitute a main framing of how work-related lifelong learning is promoted at the national level.

- The **Vocational Training Act** of 1 April 2005 regulates publicly funded vocational training for the occupations outside vocational schools and universities and including further training and retraining. This Act constitutes a modernisation of the legal basis of the German Dual System, maintaining nonetheless the institutionalised practice since the late 1960s of cooperation and co-financing between public institutions and private companies for vocational education and training. Companies voluntarily provide training for students in the Dual System and finance their remuneration during the duration of their studies; and the Länder covers the cost related to the educational institutions (see Bosch, 2010).
- The **Upgrading Training Assistance Act** (AFBG, also called „Meister-BAföG“) has been in force since 23 April 1996. It guarantees an individual entitlement to financial support for vocational education upgrading that is for participating in courses leading to further vocational skills development and attainment of higher qualifications. Financial assistance takes the form of a loan jointly subsidised by the Federal Government and the Länder which covers the cost of the training and basic subsistence expenses. The law is a comprehensive funding instrument for fomenting skills development in all occupational areas.
- The programme **“Continuing Training Grant”** (or Education Premium, Bildungsprämie) in place since 2008. It is co-funded by the Federal Government and the European Social Fund. It aims at supporting and improving the participation in advanced training programmes of people who are above 25 years and who are on low paid jobs (have taxable annual income of less than EUR 20,000). It consists of a system of training vouchers through which 50 per cent of the cost of a training course is publicly funded. The other 50 per cent has to be covered by the individual. The programme encompasses access to guidance on training options.

Public expenditure on lifelong learning for employees in the private sector is articulated in different funding structures (CEDEFOP, 2009, p. 98). Employees participating in lifelong learning can benefit from tax incentives. Participation in vocational education and training activities is fully tax deductible insofar as those activities are related to the employees' occupation or to a preparation for an occupational change. Also, training expenses incurred by employers for training their employees are reduced from the taxable income of the firm as operating expenses (e.g., wages, travel, subsistence) as long as they relate to the business interest of the employer.

### 2.3.2.1 Baden-Württemberg: a focus on low skilled workers

Most of the Germany-based companies that participated in the LLLight'in'Europe project are located in the Federal State of Baden-Württemberg, which scored first place for six times in a row in the EU wide innovation comparison assessing 87 regions in the 28 EU member states (Euractiv, 2014).

In Baden-Württemberg, federal state lifelong learning policies and initiatives in the industry are under the responsibility of the Ministry of Education and the Ministry of Finance and Economics. In general, they are primarily focused on low skilled workers. For example, the Ministry of Finance and Economics of Baden-Württemberg introduced in 2015 the Educational Leave Act granting employees of companies with more than ten employees the right to take five days of paid leave for learning activities (Baden-Württemberg, 2015). A representative of Ministry of Finance and Economics Baden-Württemberg commenting on the Act states:

*This will give workers the opportunity to attend vocational training up to five days per year with continued payment of salary. Besides vocational training, this time may also be used for political education and training in the field of voluntary activities. The aim of the law is to increase participation in further education (I65-Gov-DE, 21/04/15).*

This Act represents a step toward the promotion of lifelong learning in company environments. Currently, the challenges of the government of Baden-Württemberg in the area of lifelong learning are reaching low skilled workers with relevant learning opportunities to preserve their employability as well as targeting the retention of highly skilled workers. In an interview, a representative of the Ministry of Education of Baden-Württemberg explains:

*The main part of politics is to make an agreement with companies to invest more in lifelong learning for marginalized groups. That's definitely something we need to work on because companies are of course only interested in the shareholder value and not to create workplaces [...] The main target group of the company will always be the high skilled workers [...] We have to work to convince companies to invest more in low skilled workers [...] because they [high skilled workers] always find support from the company side (I50-Gov-DE, 21/04/15)*

Besides the provisions outlined in Box 3, the federal state of Baden-Württemberg has several measures of its own for the upskilling of low skilled workers. A public initiative in cooperation between the Ministry of Finance and Economics and the Ministry of Ministry of Culture, Youth and Sport of Baden-Württemberg together with Netzwerk Fortbildung (Training Network) is the creation of an online training portal to inform and guide employees and citizens in the choice of training offer available in the federal state. A freely available online portal with a database of 1300 training providers and 32 regional networks in Baden-Württemberg and a live chat for discussing issues related to continuing education and training (Fortbildung- Baden-Württemberg, 2015). This initiative is an example of a cost effective public measure to facilitate the match between between training offer and demand.

### *2.3.2.2 Policy interacting with companies: evidence from case studies*

The case studies developed in Germany present a variety of public policies influencing lifelong learning in companies. In most cases learning opportunities are reported to have emerged from the implementation of policies in different areas, not necessarily lifelong learning policies. This is an aspect highlighted in the following summarised presentation of evidence from the case studies.

#### Occupational Safety and Health

In C1, a big global car manufacturer with headquarters in Baden-Württemberg, lifelong learning opportunities for the employees emerged out of the implementation of the Occupational Safety and Health Act in 1995. The Act was introduced by the Federal Ministry of Labour and Social Affairs to comply with the European Council Directive 89/391/EEC of 12 June 1989 on safety and health of workers at work. In the process of implementing this law, C1 developed a research project in collaboration with the University of Heidelberg on work-life balance and financed by the Federal Ministry of Education and Research and the European Social Fund. The collaboration with the university contributed to informing the development by C1 of a comprehensive Work Health Policy, which was integrated in the company's strategy and included an extensive training programme to raise awareness on health-conscious behaviour among employees. In agreement with the Workers' Council, new training courses, lectures and learning opportunities were developed on health-related issues, work-life balance, health-conscious conduct, movement, stress, nutrition, fitness, and so forth.

#### Innovation policy

In C2, a small ICT company in the federal state of Hesse, lifelong learning for employees was shaped by policies in the area of innovation and ICT. Given the rapid changing nature of the ICT sector, training needs at C2's were not addressed by outsourcing training courses. Yet, interviewees at C2 drew attention to the impact of the following experience on their professional development through continuing learning. The innovation policy programme of the Federal Ministry of Economy and Energy combined with the High-Tech Strategy of the Federal Ministry of Education and Research created the opportunity for companies like C2 to apply for a grant to develop an innovative R&D project (BMW, 2015). C2 was a beneficiary of this grant. The funded R&D project involved working in collaboration with external partners and created non-formal and informal learning opportunities for the company's staff.

#### ICT security policy

In C6, a big ICT company in Baden-Württemberg, lifelong learning for the employees was supported by the ICT security policy of the Federal Government's High-Tech Strategy 2020 and its funding scheme for research on innovation in the ICT security sector (BMBF, 2014a).

C6 staff, being highly skilled in the area of ICT security benefitted in terms of professional development by actively participating in expert networks and not-profit organisations in the area of ICT security at the national and EU levels. Expert networks were found to create a platform for knowledge exchange, joint R&D projects and standard setting in ICT security policy.

### Collective agreements in the metal and electric industry

C7 is a medium size manufacturing company specialised in developing and producing machines and systems for metal processing with headquarters in Baden-Württemberg. At C7 we found out that lifelong learning for employees was supported by a collective agreement among social partners established in 2001. The agreement concerns the industrial metal sector in Baden-Württemberg and involves the metalworking employers' association Südwestmetall and the metalworkers' trade union IG Metall. It institutionalises the right to further and continuing training for metalworking employees and regulates its funding. Besides making compulsory for employers and employees to have yearly meetings for assessing the employees' training needs and agreeing on training plans, it establishes funding mechanisms for two types for training activities: workplace training and personal training. The cost of the former is to be fully covered by the employer. The second type focuses on training activities agreed between employees and their supervisors whose cost is split between the employer and the employee. C7, being a company member of Südwestmetall, complied with the obligations of this collective agreement. Yet, the study shows that the company prioritises training for the highly skilled employees and does not seem to make use of the available public policy initiatives for training semi-skilled and unskilled workers in Baden-Württemberg (see above).

### Vocational education and training policy

C5 is a big multinational company specialised in the development and production of industrial and commercial ware washing for the food service industry with headquarters in Baden-Württemberg. At C5 lifelong learning for the employees was found to be supported by the partnership between the company and the public Duale Hochschule Baden-Württemberg or the Cooperative University of Baden-Württemberg. The partnership is framed within the Vocational Training Act mentioned above in Box 3. The case shows that the experience of teaching and supervising students at the workplace and during bachelor and master dissertations and of interacting with academic staff and other partner companies within the framework of this partnership generates lifelong learning opportunities for the company's employees. These opportunities originate from a mutual beneficial knowledge exchange between the university and the industry.

### Accounting and tax auditing compliance

In C3, a medium size software development and consulting company with headquarters in Baden-Württemberg, there is a common understanding among employees of external training as being instrumental to meet occasional specific learning needs deriving primarily from new developments in the IT industry. Otherwise there is within the company a strong sense of an internal capacity to informally address job-related lifelong learning. Yet, C3 collaborates with public universities as an occasional provider of free of cost training courses. The courses are on its specialised information management software solution for facilitating data analysis in the context of on-going fundamental changes in accounting and auditing compliance standards and practices in Germany. Consequently, they target in particular students in the areas of auditing, financial and management accounting and risk management. From the viewpoint of C3, this kind of cooperation constitutes an indirect marketing opportunity with no return in terms of professional development. For the students, it represents a chance to become acquainted with an IT tool that will be useful for doing their job as professionals.

### Complementary and alternative medicine

C4 is a medium size company located in Baden-Württemberg and specialised in complementary and alternative medicine (CAM). From a public policy perspective, there is little support and funding for continual training and skills development of CAM professionals in Germany. C4 addresses this circumstance through private and non-profit training provision. The training offer for C4's employees tends to be covered by private training centres and associations of CAM professionals. Being an active participant in CAM-related networks also enables the company to be an influential actor in the development of policies and practices concerning CAM.

#### 2.3.2.3 Key messages

In general, the data on the German-based case studies points to how transversal the matter of lifelong learning is. To better support lifelong learning, the key messages are:

- Policy-making should address the demand for lifelong learning created by the governing of various policy areas.
- Facilitating and at the same time regulating partnerships between companies and education institutions in the public sector is recommended.
- Raise awareness among employers of public funds supporting the upskilling of semi-skilled and low skilled workers would be important.

### 2.3.3 Italy

In Italy, the public policy framework supporting lifelong learning for employees in the private sector is under the responsibility of the Ministry of Education and Research (MIUR), the Ministry of Labour and Social Policies (MLPS), the regions and autonomous provinces, and social partners. The national legislation governing lifelong learning activities in Italy comprises the following laws (CEDEFOP, 2014a; MLPS, 2015):

- Law 53/2000: supports workers' right to lifelong learning with measures of the Ministry of Labour and Social Policies to finance employees' paid leave for training activities using training vouchers. These funds can be used for training activities submitted by the employees or by companies based on contract agreements.
- Law 236/1993: finances in-company training and establishes measures for allocating national funds and European Social Funds to regions to be distributed among enterprises that train their employees. Regions select target groups and must report to the government.
- DPR 917/1986, p. 26, Art. 54, Section 5: establishes tax relief measures for the training of self-employed professionals where 50% of training-related expenses for training activities can be deducted (EUR 400 million annually).

Employees participating in lifelong learning can benefit from tax incentives. Tax relief on personal income tax is applied to employees participating in higher education or university courses. All training, updating, requalification and retraining provision is VAT exempted when provided by public education institutions or non-profit organisations. For self-employed professionals, tax relief can cover 50% of the expenses incurred in participation in training courses (CEDEFOP, 2014a).

The Italian publicly funded training provision for employees in companies includes measures for adult education and continuous training. The goals for continuous vocational training are set by the Ministry of Labour and Social Policies and training activities are managed by the regional governments and autonomous provinces. Regional governments and autonomous provinces elaborate training strategies and draw on funding from the Ministry of Labour and the European Social Fund (EQF, 2012). Social partners, under the responsibility of the Ministry of Labour play an important role in promoting in-company training plans. These are based on inter-confederal agreements between social partners and financed through inter-professional funds (CEDEFOP, 2014a).

However, the publicly funded training opportunities available depend on the type of profession. Professions are regulated by the state and the regional governments and can be divided in intellectual and non-intellectual, regulated and non-regulated professions. Regulated professions are defined by specific professional profiles, training plans and certificates needed to exercise the professions (EQF, 2012).

### 2.3.3.1 Policy in interaction with companies: evidence from case study

The case study developed in Italy within the framework of the LLLight'in'Europe project looked into C36x, a small Italian architectural firm specialised in design, visual arts, architecture and urbanism co-founded in 2009 by four young professionals in a city in the northeast of Italy. All of the four co-founders have a higher education degree in Architecture and are members of the Association of Architects. They are the only full time employed members of the company.

In Italy, training opportunities for architects are regulated by Article 7 of Decree no. 137/2012 of 7 August 2012<sup>2</sup> which concerns self-employed professionals and establishes that all members of the Association of Architects are obliged to participate in tax-deductible lifelong learning activities. Within this legal framework, social partners manage joint inter-professional funds for continuing training through collective agreements. The National Council of Architects (CNAPPC) monitors the implementation of this regulation, the organisation of learning activities, identifies the requirements for training providers, and assigns the number of CFP (professional training credits) for training courses. Failure to comply with the requirement to take part in lifelong learning activities can lead to disciplinary measures for professionals in Architecture.

Interviewing data from the case study on C36x point to an important tension between the legal enforcement of architects' participation in formal lifelong learning activities and the company's approach to lifelong learning where voluntary and project-based learning activities is favoured. The co-founders and only permanent employees of C36x do abide by the law. They participate in publicly funded lifelong learning activities as required. Yet, their accounts of this experience clearly indicate this is an opportunity available to them as professional architects that does significantly contribute to their professional development. As stated by one of C36x's co-founders:

*There are training programmes that I would personally attend but they are always related to the university and academic environment, and much less to a transversal training made from professionals to professionals... If we could choose, we always try to choose training programmes done by people who tried on their skin to do what they teach. (I57-Dir-IT, 06/05/2015)*

Gaps between the (academic-based) training offer funded by the state and their training needs as (in business) professionals explain this mismatch, which is proactively overcome at C36x through engagement with working with external partners and local networking on a rather cross-sectorial basis (see Chapter 3 in this report).

<sup>2</sup>Decreto del Presidente della Repubblica 7 agosto 2012, n. 137, Regolamento recante riforma degli ordinamenti professionali, a norma dell'articolo 3, comma 5, del decreto-legge 13 agosto 2011, n. 138, convertito, con modificazioni, dalla legge 14 settembre 2011, n. 148. (12G0159) (GU Serie Generale n.189 del 14-8-2012).

### 2.3.3.2 Key messages

For Italian policies to better support lifelong learning for employees in the private sector, it would be important to consider the following areas in need of improvement:

- Adjustment of public lifelong learning provision to the needs of professionals by designing a tailor-made offer;
- Investment in training the trainers to adjust methodologies to audience;
- Allocation of public funding for lifelong learning according to the nature of the work within specific sectors.

### 2.3.4 Slovakia

*An institutional framework for supporting SMEs is rather complicated and characterized by large number of involved actors and complexity of implied inter-relations. (Slovak Business Agency, 2014a, p. 26).*

In Slovakia, general support for SMEs is governed by the Ministry of Economy. Since 1993, the Slovak Business Agency<sup>3</sup> has been specifically involved in facilitating complex support for SMEs and for the programming period of 2014-2017 the Ministry of Economy has approved six advisory support programmes to be run by that Agency. Among the six programmes, one is providing support to education and guidance to SMEs (Slovak Business Agency, 2014b). This is the programme '07 K 02 05'. The programme's name is equivalent to beginning entrepreneurs and includes provision of indirect support in the form of subsidised consultation services and short-term courses in thematic areas related to SMEs' entrepreneurship environment.

At the national level, the Slovak government has adopted in 2004 a Lifelong learning framework (157/2004) followed by its integration into relevant programming documents. One of the first direct outputs was the Lifelong Learning Act of 2009 (568/2009). For the time span covered in this report, the Lifelong Learning Strategy 2011 is relevant. This is an action plan for the period of 2011-2014 under the responsibility of the Ministry of Education, Science, Research and Sport (MŠVVŠ SR, 2011).

Within the framework of this Strategy, the competency for lifelong learning has been assigned to the National Institute for Lifelong Learning, an organisation directly subordinated to the Ministry of Education, Science, Research and Sport. In 2013, the Institute launched a two-year project titled 'Further Education and Guidance for Adults as a Tool for Better Enforceability at the Labour Market'. This project has chiefly been centred on creating structures at the (sub-) regional level, - 'Adult Guidance Centres' -, as well as on developing training for adult guidance services tutors, descriptions and accreditation of 44 specialised professional profiles.

<sup>3</sup> Until 28 February 2014 named National Agency for Development of SMEs. It was founded in 1993 as a common initiative of the EU and the government of the Slovak Republic. The founding members are the Ministry of Economy of the Slovak Republic, the Entrepreneurs Association of Slovakia and the Slovak Association of Crafts.

The latter are intended to serve as a basis for the development of vocational education modules aimed at the professional (re)qualification of adults (I41-Gov-SK, 17/02/2015). To date, this initiative has not had any specific focus on the SMEs sector and it has relevance only for a limited group of SMEs because of the selected 44 professional profiles.

Besides education, the Slovak Ministry of Labour, Social Affairs and Family has overseen a range of policy measures concerning employment, which include programmes supporting lifelong learning in companies. These measures originate from the implementation of Decree no. 5/2004 on Employment Services (MPSVR SR, 2004). Within this legislative framework, of most relevance for SMEs<sup>4</sup> is the financial support given for work preparation and training of employees (Article 47) and of job seekers (Article 46). The support is provided through a financial contribution that partially covers the training costs incurred.

#### *2.3.4.1 Policy interacting with companies: evidence from case study*

There was only one Slovak company participating in our case study research. This company, henceforth C23, a small company internationally trading agro-food commodities since 1991, provides an interesting example of the absence of a dialogue with the above outlined policy framework.

Based on information from interviews at C23, the 07 K 02 05 programme led by the Slovak Business Agency is an initiative that is not sufficiently specific to substitute or contribute substantially to employees' training needs. The Further Education and Guidance for Adults project by the National Institute for Lifelong Learning has so far not contemplated the professional profiles of C23 staff. Finally, the possibility to apply for a co-financing of the training costs incurred established by Decree no. 5/2004 on Employment Services is reported not to be worth exploring as it entails a general administrative burden perceived as being excessive this type of public support.

Besides government initiatives, there are umbrella organisations, business and sectorial associations providing indirect support via the organisation of seminar and lectures and information dissemination events in C23 environment. Yet, they tend to focus mostly on start-ups, beginning and young entrepreneurs, risk and marginalized groups. Such a focus might be one of the reasons why interviewees at C23 reported that they do not view those events as being potentially supportive with respect to meeting the training needs of the company.

However, an important aspect of the case of C23 is that despite a remarkable disconnect from initiatives in its public policy environment concerning lifelong learning, continuing education and training opportunities lie at the heart of the company's culture and learning is understood to be a crucial factor for the development of the company.

<sup>4</sup>For summary information on support measures available to SMEs see e.g. Slovak Business Agency, 2014b.

In fact, the case of C23 provides an empirically grounded insight on how an individual company identifies and implements practices that create conditions for an open and trusted environment as a prerequisite for integrating on-going learning in the daily activities undertaken across the entire company.

#### *2.3.4.2 Key messages*

We find that the Slovak Business Agency's claim that the institutional framework for supporting SMEs, including hence support in the area of lifelong learning, is complicated coheres with both our documentary analysis of available support schemes as well as with our findings from field interviews at C23. The formal public policy frameworks and measures developed explicitly for advancing a lifelong learning agenda in Slovakia do not have a specific focus on SMEs.

From the point of view of C23, a growing well-established small company, most relevant measures would be those linked to active labour market policies and provision of direct financial support to training initiatives at company level. However, the administrative burden related to applications for public subsidies is likely to go on contributing to a low interest of SMEs in seeking public support for their investments in lifelong learning.

#### *2.3.5 Spain*

In Spain, there is a long-standing separation of competences between the Ministry of Education and the Ministry of Labour and Social Affairs with respect to education and training. Whereas the Ministry of Education oversees the formal education system comprising pre-schools, schools and universities, and including vocational education at secondary and tertiary levels, the Ministry of Labour and Social Affairs regulates a web of structures and public funding schemes exclusively devoted to what is termed in Spanish *formación profesional*, literally translated as professional training. More concretely, 'professional training' refers to non-formal and informal lifelong learning courses for workers. Moreover, public policy instruments for professional training divide workers into two main groups: the 'occupied' (employed and self-employed individuals) and the unemployed. Here we focus only on policies concerning the former group and particularly hired workers in the private sector and discuss empirical evidence of their impact at the enterprise level.

##### *2.3.5.1 Public funding for the individual employee and employer*

At present, the provision and allocation of public funding for professional training is regulated by the Royal Decree 4/2015 of 22 March 2015. This very recently adopted Decree continues what was previously established in Royal Decree 395/2007 with respect to measures for incentivising participation in professional training at the enterprise level. One of these measures is granting a hired employee a professional training annual leave of 20 hours. The other measure consists of a social insurance tax relief scheme for incentivising companies to provide training for their employees. Tax relief is calculated on the basis of a fixed percentage of state contribution to employers' investment in training.

The percentage depends on the size of the company. The smaller the company is, the higher the tax relief is. It has not increased since 2007. The two measures are inter-related insofar as the right to the training leave of 20 hours is considered to be fulfilled when the employee participates in training courses organised by the enterprise (Royal Decree 4/2015, Cap. III, Article 6).

### *2.3.5.2 Alignment with flexicurity principles? Funding professional training providers*

However, the current legislation introduces a major novelty in the way in which the national Spanish government will support and fund professional training provision as of the new fiscal year starting in January 2016. This novelty rests on the decision to put to an end the so-called 'training plans'.

Over the past two decades, the 'training plans' have been one of the main national policy instruments for facilitating hired workers free of cost professional training courses outside their workplace and independently of a particular enterprise learning needs. 'Training plans' in the Spanish public lifelong learning policy context refer to comprehensive annual or biennial plans of provision of cross-sector and/or sector specific training courses designed by social partners (a trade union and/or an association or federation of industries representing a group of employers) and submitted to an autonomous community government for approval. The approval process would lead to the establishment of an agreement wherein the total cost of the training to be organised and delivered was covered by the national state budget and eventually complemented by the autonomous community government<sup>5</sup> budget. Some autonomous communities would also take the initiative of fully sponsoring a number of professional training plans. Within the framework of this kind of tripartite agreement, social partners took responsibility for the proper implementation of the funded training plan, including administering the funding so as to have in place well-equipped facilities, qualified trainers and quality training.

Although the new Decree states that the reforms that are introduced "are clearly in harmony with the flexicurity policies promoted by the European Union and based upon the idea of employability" (Royal Decree 4/2015, III, p. 25021), it is interesting to note that this alignment is only obvious at the level of the emphatic discourse on "consolidating in the productive system a professional training culture and favouring through it the creation of stable and quality employment" (ibid.).

The reforms this new Decree introduces contain a deliberate weakening of the social partners' role as organisers and providers of training for workers. This role was dependent on the commitment of the national government to take part in the collectively agreed training plans as the provider of funding.

<sup>5</sup> Under certain circumstances, it was also possible to submit a training plan to a nation-wide government agency.



Such a commitment has now been withdrawn against the backdrop of the political decision to “introduce in an unequivocal way open competition among all accredited and/or registered training providers as a general rule for the management of funds aimed at financing the training programmes of different public administrations” (ibid., IV, p. 25023).

Consequently, this means that social partners together with publicly administered professional training centres and private training providers will compete on an equal foot (but not on an equal material capability basis) for public funding in a context of increased technocratic demands for ‘transparency’ and quality assurance certifications.

Moreover, from the enterprise viewpoint, it became possible to place as a customer an order to a trade union or an industry association for a tailored training course whose cost can be partially financed by public funds (Cap. II, Article 8). The policy objective of this measure is to enhance the overall capacity of the professional training system in Spain to respond effectively and flexibly to the learning needs of the labour force in a fast changing economic environment. The policy objective is formulated from the standpoint of business vulnerabilities and not of the workforce. In the light of its underlying political economic logics, the practice of providing training opportunities according to the principle of representing the collective professional development interest of an organised association of employers or workers has definitely been outlawed.

#### *2.3.5.3 Insights gained from the field research: evidence from case studies*

Drawing on the case study research conducted in Spain, there are two distinct scenarios of how public policy can or cannot encourage enterprises’ investment in lifelong learning provision for their employees. These are documented in [Box 4](#) and [Box 5](#).

#### Box 4. Scenario A: Why not investing in professional training

The small size management consulting firm C10 seated in Oviedo makes use of the tax relief scheme to provide all of its employees the opportunity to participate in outsourced, in-company English language courses. The tax relief is however claimed to constitute a source of public funding that contributes little to covering the cost of outsourced training. Awareness of this cost exists insofar as C10 is a provider of training consultancy services. But, as an employer, C10 invests little in external training.

While consultants at C10 are encouraged to engage in self-learning activities when doing their job and are supported through mentoring and peer-to-peer learning company strategies, the management of C10 explains that not investing in more formal lifelong learning is motivated by a mismatch between employees' learning needs and the offer of professional training. Two interviewees explained:

Many times we work with new issues when developing projects with clients and there is no offer of training courses on these specific issues; the training opportunity doesn't exist to be taken. (C10's CEO, I3-Dir-ES, 08/07/2014).

For us, a course that is relevant to participate in is most often a course that offers cutting-edge knowledge of interest for the lines of business which xxx [C10] is in the process of developing (C10's Head of Department, I2-Dir-ES, 08/07/2014). If this kind of "cutting-edge" course is timely realized to exist, the company then eventually sponsors the participation of one of its consultants in it. The option of commending tailored training courses was not mentioned in the interviews.

### Box 5. Scenario B: When participating in professional training is mandatory

Located in a small seaside town in the north of Asturias, C12 is a full-care facility for the elderly with a capacity of 118 resident places. It employs 56 people, 3 have a Master degree, 6 a Bachelor, and the remaining have or are in the process of obtaining a formal professional training qualification, or have no formally recognised qualifications at all. At C12, participation in training is mandatory for all employees in the sense that it is a job duty and duty to be fulfilled during working hours. This measure originates from C12's management commitment to abide by publicly regulated quality standards of provision of care in care homes.

The articulation between training of care givers and the quality of care provision is one of the main elements of the Resolution of the State Secretariat for Social Policy, Families and Dependent and Disabled Care dated from 2 December 2008. This Resolution continues a trajectory of profound transformation in long-term care policies in Spain that began with the ratification of the Royal Decree 39/2006 on the Promotion of Personal Autonomy and Care for Dependent Persons. It is part of an intensive legislative activity wherein long-term care for the elderly has become institutionalised as a particular public policy field. The Resolution is specifically about establishing the common standards that dependent care centres and services in the entire territory of Spain need to observe in order to become officially credited for their quality.

When looking into these standards, it is outstanding how detailed they are with respect to the quality of human resources in a care home. For example, on lifelong learning, the Resolution establishes a minimum number of work related training hours per year for all workers in a care home, which is determined according to specified ratios for each type of care service (day care, full care, domicile care, and so forth). For C12, this translates into an obligation to invest in training but also to consider training as a means to supporting its low skilled care givers in tackling the need to meet professionalization requirements.

In this case, what primarily drives the provision of professional development opportunities through professional training is not the Spanish labour policy framework. However, awareness of the contents of this framework exists at C12 and the tax relief scheme is reported to have always been used and to have furthermore contributed to financing the Master degree on Quality Management that one of C12's completed in 2013.



In both scenarios the dialogue with public policy related to lifelong learning is remarkably different. The difference illustrates how the more a professional profile is publicly regulated, the greater is the effectiveness of public policy measures aimed at promoting, facilitating and shaping lifelong learning activities at the enterprise level. The two other case studies developed on the Basque Country-based participating companies C9 and C14 sustain this point as they evidence a positioning similar to Scenario A.

While C9 is a small size software development enterprise, C14 is a large, independent and internationally renowned Research, Development and Innovation employing 1415 people, 200 of whom hold a PhD degree. Independently of the public policy framework for lifelong learning, C14 provides a catalogue of internally organised courses for everyone to choose and voluntarily attend. Yet, like in the cases of the management consulting firm C10 (Box 4) and of C9, data point to a preference on the part of employees to autonomously engage in self-learning and peer-to-peer learning activities.

#### *2.3.5.4 Key messages*

On the basis of the research conducted in Spain, the following observations are noteworthy.

- Innovation-oriented works conditions appear to encourage certain kinds of lifelong learning that do not require public support for enterprise investment in lifelong learning for employees. In this case, companies evidence autonomy in learning and in organizing learning for their employees.
- Regulation of professions may create a particular demand for lifelong learning that would require further and targeted public support.

## 2.4 Conclusions

Overall, insights gained from field research on how public policies really support lifelong learning in companies suggest that there is neither a strong reliance nor appreciation on the part of companies regarding the current subsidisation of their staff development initiatives. In this respect, among companies there is uncertainty about the effectiveness of the current public policy measures focused on encouraging lifelong learning in the workplace, with the following similarities being found among different companies located in Denmark, Germany, Italy, Slovakia and Spain.

- Collective agreements between social partners constitute a powerful mechanism for enforcing workers' right to continual participation in lifelong learning by demanding companies to invest in their human resources and by shaping their management of professional development.
- Publicly subsidised work-related training provision is perceived as not generally meeting the specific lifelong learning needs of staff. This is especially the case in knowledge intensive and innovation-oriented working environments.
- Utilization of public policy provisions and funds in the areas of education and vocational training as well as of innovation and R&D entails the experience of generating relevant lifelong learning opportunities for employees.
- Regulation of professions such as architects and health and social care professionals create lifelong learning needs and cause significant impact on ensuring the implementation of training and staff development plans by companies.

## 3. PARTNERSHIPS AND NETWORKS CONTRIBUTING TO LIFELONG LEARNING OPPORTUNITIES

### 3.1 Chapter focus

The idea that connections and networks are important supports for lifelong learning is well-established in the literature relating to individuals' learning (Field, 2005), drawing both on a long tradition of emphasising the importance of community and collectivist in adult learning, and on more recent sociological literature using the concept of 'social capital' (Coleman, 1988; Putnam, 1995, 2000). In the LLLight'in'Europe project, we investigated how far this is also true of business enterprises focusing on partnerships and memberships with education, training and R&D providers and non-governmental organisations (NGOs).

This chapter presents evidence that this is true. These kinds of interactions can have an important impact on the scope and quality of lifelong learning opportunities for company staff.



But also they represent an important means for companies to playing a role in shaping knowledge, professional expertise and education and training provision available outside their specific working environments. With reference to education provision in particular, our study also documents several situations where companies are themselves training providers. Although this is not the norm, in increasingly service- and knowledge-oriented economies, it is an important feature of contemporary lifelong learning in many countries, and the chapter draws attention to the importance of gaining an understanding of the role that such companies can play in the ecology of lifelong learning policy.

In contrast with chapter 2 of this report, the findings presented here are based upon a selected number case studies so as to illustrate in more depth the dynamics of companies' engagement in (most generally public-private) partnerships and networking in their environments.

## **3.2 Partnerships with education, training and research institutions**

1. Facilitate internship and traineeship placements
2. Occasional expert training provision
3. Joint development of research projects

### **3.2.1 Facilitate internship and traineeship placements<sup>6</sup>**

Our research shows that in particular for small and medium sized enterprises participating in university traineeship schemes is helpful for gaining access to relevant human resources but also to updated knowledge of training and educational opportunities available to them.

Let us consider in the first place the case of C8, Danish architectural firm seated in the university town of Aarhus and with a total number of employees that is fluctuating but often no less than 70. In Denmark, architecture students have the opportunity to spend up to 5 months of their education time in an enterprise; learning in the workplace. C8 offers internships to these students in its offices in Aarhus. The Aarhus School of Architecture provides C8 with relevant human resources. As a C8's team leader explains: "We also have a School of Architecture here in Aarhus, which means that we have access to newly graduated architects that we can hire all the time" (I34-Man-DK, 7/11/2013).

<sup>6</sup>The case of partnership between a company based in Germany (C5) and the public Duale Hochschule Baden-Württemberg or the Cooperative University of Baden-Württemberg is not included in this analysis (for more details, see chapter 2 of this report). The case is country and moreover regional-specific whereas the diverse forms of partnership with education and research institutions noted here were found across countries and regions. Nonetheless, it is noteworthy that C5's long-standing partnership with the Cooperative University of Baden-Württemberg enables it to influence the design of curricula within the dual study programmes of this institution and to recruit trainees who are described as being "enthusiastic, ambitious and flexible team players" in publicly available documentation by the company.



Similarly, in Germany, there is the case of C6, a medium size ICT company specialised in industrial software development and engineering for automotive, aerospace and robotics industries. C6 collaborates with several German universities offering not only internships but also joint supervision of Master and PhD students. These activities are reported to contribute to shaping the development of students as future workers in the engineering profession. Moreover, they are perceived by the interviewed company staff as a way for the company to identify and train young talent who may become in the future its employees.

C10's connection with the University of Oviedo's traineeship scheme for students provides another illustration of this phenomenon albeit it adds in an experience of mutually beneficial knowledge exchange. With its headquarters in the northeastern Spanish city of Oviedo, C10 is a small size management consulting company where employees' initiative to engage in self-learning activities is most valued.

Under the University of Oviedo's traineeship scheme, students voluntarily apply for a six-month to one-year placement in companies. The placement is formally recognised as part of their programme of studies. According to a staff member of University of Oviedo (responsible for supervising these placements), the University ensures that the participant companies are legally compliant and that students are insured, but "the majority of the companies do not pay anything to students; it is assumed that it is for the individual households to sponsor the possibility of having this kind of training opportunity" (I6-Edu-ES, 11/07/2014). Clearly this plays a part in recruitment networks, but C10 also considers that the presence of students/trainees in its working environment enables its personnel to learn and become aware of knowledge gaps and out-dated methodologies whilst sharing their work experience-based know-how that is viewed as not being learnable and trainable at university (I1-Dir-ES, 08/07/2014).

### 3.2.2. Occasional expert training provision

The benefits of good relationships between companies and higher education institutions seem clear: recruitment and retention of good workers and a beneficial and mutual knowledge exchange. At the same time, we should notice that there are risks in this kind of partnerships, which may require attention from a public policy perspective.

For instance, C3, a Germany-based medium size software development and consulting corporation owned by three partners, has partnerships with five universities in different locations in Germany as part of its 'Higher Education Programme'. These partnerships involve universities' access to a free licence for using its core software product (which we have called AIDA) as part of the beginners-level training sessions that the company voluntarily delivers to their students. The training offered is addressed to students in the areas of auditing, financial and management accounting and risk management and is for the company an indirect marketing strategy. As a senior C3 consultant put it to us:

*[...] the main advantage is that the people who get to know the software from their studies, from the university, when they get employed, they go to their employers and can say: "OK. I know there is something better than Excel and I would like to use xxx [AIDA] because I know what the solution is capable of." Usually the people to whom we showed xxx [AIDA] at university go to their employers and ask: "Can you please buy me xxx [AIDA] so that I can use it at work?" (I48-Emp-DE, 26/03/2015)*

This clearly business-oriented intervention of C3 within the universities compromises the public interest dimension of the university space and whether the students are best served by using AIDA rather than some other software is relevant to bring into question. From a company perspective, this intervention may be a source of competitive advantage without any concerns about the common good.

Considering the data available from the case study research in LLLight'in'Europe, there are other traceable indications that other companies keeping relations with education and training institutions do so primarily in pursuit of their business interest to place their products and/or services in the market. This the case of the ways in which C9, another IT company located in Bilbao (Spain) and particularly committed to develop free/open access software, intervenes as a training provider of publicly subsidized continuing training courses and collaborates with Basque public and private universities by offering seminars, open lectures and demonstrations in 'Technology Days' events. These activities indicate that C9 plays an influential role in locally dissemination of what free software is about and in stimulating public interest for learning more about its potential - and therein they represent activities that have the potential of generating business opportunities

It is also and more explicitly the case of the partnership between a private university and C14, a large private research centre located in Basque Country, Spain, in the establishment of a Master course where C14's expertise on entrepreneurship education becomes highly valued and formally certified.

However, empirical traces of this situation are mainly based on documentary analysis. Interviewees often did not refer to a deliberate company strategy as explicitly as in the above-cited interview.

### *3.2.2.1. Joint development of research projects*

With regard to development of research projects with universities in the public sector, C1 provides a clear case: joint work with a German university was clearly a matter of playing a part at the forefront of scientific knowledge in a field it had been identified as important to its activities in the area of staff welfare.

C1, a global car manufacturer with around 275,000 employees around the world, developed in its headquarters in Germany the project entitled 'Work-Life-Balance: Ways to sustainably and firmly establish work-life balance in the corporate culture'.



The project was carried out in cooperation between the University of Heidelberg, which was responsible for the scientific part of the study, and C1's Health and Safety Policy Department, which provided organisational insights and access to 6,000 employees in 2012. There is evidence that this joint research contributed to informing the creation of new lifelong learning opportunities for staff, including training for managers designed to embed work-life balance principles in work and home life and strengthening workers' resilience and ability to deal with conflict.

Furthermore, there is evidence that it was a component of C1's engagement in taking a proactive role in the field of work health policy at the company level, which later was gained public recognition and disseminated as being an 'exemplary case' at the European level. Visibility as an attractive employer was gained both externally and internally in this process and can be viewed as constituting a contributing to the branding and competitive advantage of C1.

### **3.3 Participation in networks**

Participation in networks' is a highly disputable analytical category. In this section, we refer to participation in social networks embedded in the activities of NGOs whose mission is often related with a highly specialised field of knowledge and/or knowledge-based businesses. This was the main form of networking found among the companies investigated. As exemplified in the following three cases, they constitute a form of 'social partnership' that is often directed towards lobbying particular group interests in public policy environments but also foments lifelong learning opportunities of relevance both in those environments and within the company.

#### **3.3.1 Example 1**

Among the companies that participated in the study we found several examples of company managerial staff engaged in networking on the basis of a clear ideological, or at least programmatic, positioning – that is, with a determination to shape or change policies or perspectives (in government or more widely) through that engagement. The outstanding case of this in our study was C9, already briefly mentioned above.

As published in its website, the mission statement of C9 is "to become a benchmark enterprise in the area of free software within the Basque Country". The statement encapsulates the two key ideological prongs of its vision: first, the development and promotion of 'free software', which, as we have briefly noted, presupposes the defence of a cause in organisational, educational and commercial policy terms. At the same time, C9 identifies deeply with Basque Country. This geographical identity points to its emphasis on establishing strong commercial and social relations locally rather than wider expansion. The result is that its strong advocacy of free software goes hand-in-hand with its advocacy of Basque interests, namely encouraging Basque regional government agencies to implement free software in their IT infrastructure for facilitating so-called 'e-democracy'.<sup>7</sup>

<sup>7</sup>This is, of course, partly a matter of its own business advantage - but the company also sets clear limits to the areas in which it will seek business advantage.



This is for instance put into practice through membership of the small and local NGO ESLE - Asociación de Empresas de Software Libre de Euskadi (Basque Country Association of Free Software Enterprises), of which C9 is a founding member. Such affiliation has contributed to strengthening C9's capacity to play an influential role in shaping the demand for and offer of lifelong training in the field of ICT.

ESLE comprises 33 free software development enterprises, mostly micro-enterprises that together employ 620 people (ESLE, 2014). Besides support in legal and business representation matters, ESLE provides its associates with education and training services, including workshops on management, marketing, quality and organisation of lifelong education courses. Moreover, ESLE provides a mechanism, which facilitates these small and very small enterprises to provide technical consultancy expertise, promoting governmental initiatives and providing training in Bilbao's public administration context. Member enterprises of ESLE find themselves in a local public policy environment that demands both their expertise and other highly specialised services, including the delivery of professional training courses based on the particular free software systems and applications they advocate. ESLE has established agreements with Lantik, the entity of the Provincial Government of Bilbao (Diputación Foral de Biskaia) responsible for IT services, and the governmental IT Society of the Basque Country (Sociedad Informática del Gobierno Vasco, EJIE). In this respect, involvement with ESLE strengthens C9's competitive position in line with its clearly articulated stand in relation to the IT industry and development.

### 3.3.2 Example 2

A similar case but in a rather different entrepreneurial context is that of the micro Italian architectural firm, C36x. C36x is a member of a local association, Manifetso2020, concerned to map and assess the condition of empty public estate buildings in its city and to work with municipal authorities to prevent their decay by urban renewal and in accord with the needs of the population. This association facilitates and mediates collaborations between C36x and the public sector where the latter is a client. C36x offers technical expertise to Manifetso2020 which in turn opens access to publicly-funded projects that do not only bring value to the company but also to the urban population of the city. This means that the company can engage in projects with local governmental institutions on urban renewal and use of public spaces, interacting with bureaucratic governmental structures to build on its capacity to develop multi-stakeholder projects.

C36x is also involved in Impact Hub Trieste, a business accelerator supporting local young entrepreneurs in developing ideas into enterprises through various activities including training activities.

In addition to being a contribution to the expansion of C36x's social capital and influence in urban renewal planning of the city where C36x is based, C36x staff highlights that engagement in both of these networks is an important source of practice-based lifelong learning;

; if not the most important source of lifelong learning. As one of the co-founders explained: “We dedicate a lot of space to the exchange with our partners, but also internally [...] the process through which we reach a plan makes the whole process a learning process [...] Planning together is a learning process” (I57-Dir-IT, 06/05/2015). And this is partly achieved through the ways in which participating in these networks facilitates and mediates peer-to-peer learning and knowledge transfer among the professionals and businesses in areas that are relevant for C36x.

### 3.3.3 Example 3

One enterprise we studied, C12, a full-care facility for the elderly situated in a small town of Asturias (Spain), far from the ‘cutting edge’ of technological innovation used its membership of the Club Asturiano de Calidad to strengthen its capability and credibility. But this had a positive side-effect on the development of lifelong learning opportunities for its employees as well.

Club Asturiano de Calidad is a regional NGO for the improvement of management in organisations. It is a partner of the European Foundation of Quality Management (EFQM). EFQM’s mission is to disseminate a specific quality management model for achieving “organisational excellence”, which is said to be applicable to “any organisation, regardless of size, sector or maturity” (EFQM, 2015).

Within the health care sector in the EU in general and recent developments in the social care policy in Spain in particular, an external quality peer review mechanism such as the certifications of quality provided by EFQM is beneficial. C12 sought and obtained a EFQM 200+ certification via its membership of Club Asturiano de Calidad.

On the one hand, this involved going through a staged learning process with the assistance of an external expert: initial training on the EFQM model, a self-assessment of how well the organisation is doing in various areas according to the model, and using a standard assessment tool. One outcome of this process was certainly learning a methodology for the development of a quality management strategic plan. On the other hand, many of C12’s staff had poor IT skills (some had never turned on a computer). But their involvement in the acquisition of a EQFM certification for the company contributed to raising awareness about the importance of developing such competences as it required the implementation of an IT system in the entire residence for improving internal communication. Once the certification was awarded, staff continued to manifest their interest in training aiming at improving their IT literacy. When reflecting on this experience, one of our interviewees observes:

*Although we had other kinds of training last year, IT training for using the new system was identified as the employees’ favourite in a survey we did. Partly, I understand this because IT training is something that allows for immediately starting to create things that you can see (I8-Man-ES, 14/07/2014)*



This is a case that shows how a company participating in networks is able to generate learning in various ways, including learning by both highly skilled managers and low skilled staff.

### **3.4. Conclusions**

In conclusion, with reference to accounts of the experience of engagement in partnerships with education and research institutions as well as in membership with NGOs, companies demonstrate to be better positioned to take advantage of the lifelong learning opportunities available to them, with the following observations being key findings in this regard.

- Participation of companies in arrangements for facilitating traineeships for students in public (higher) education institutions helps generating mutually beneficial knowledge exchange and skills development dynamics.
- Companies' involvement in NGOs and professional networks facilitates participation in highly valued peer-to-peer learning and knowledge transfer activities. It contributes moreover to a better identification of education and training needs in accordance with business development needs.
- For small and medium size companies, membership to specialized NGOs can be a mechanism for encouraging the development of Human Resources management expertise within the enterprise.

Our research has however also shown that companies and their representative organisations can also achieve competitive and business advantages through these kinds of interactions. Many of these seem entirely legitimate and mutually beneficial. However, in an environment when public bodies are increasingly short of funding, there is a case for regulation to ensure their autonomy in the face of companies which may seek to place their business advantage above the common good. One dimension of this is where companies seek to place their products in the public sector. Another, more broadly, is the question of whether employability and similar vocational objectives have been promoted so strongly as to place broader social and citizenship learning at a discount. Overall, in this respect, the key message is:

- Public policies encouraging partnerships between companies and public educational and research institutions is recommended as there is evidence that these partnerships contribute to building lifelong learning within companies. However, the role of the state as a regulator of this kind of partnerships is highly important for addressing the risk of specific business interests dominating these relations.

## 4. CIRCUMSTANCES AFFECTING LIFELONG LEARNING IN THE WORKPLACE

### 4.1 Chapter focus

This chapter focuses on the relationship between internal and external circumstances encouraging lifelong learning at the enterprise level. By accounting for this relationship it is gained an understanding of the relative role that public policy and public economic incentives can play in shaping employers' investment and employees' attitudes towards fomenting employability through lifelong learning in the workplace.

The analysis shows that in the case of companies that employ highly qualified professionals and develop project and research-based products and services there is less investment in training courses and more individual autonomous initiative to meet learning needs. What primarily induces lifelong learning in these companies is the engagement of individuals in doing their jobs. From this perspective, lifelong learning is understood to be constitutive of labouring rather than an extra or complementary professional development activity.

The chapter is empirically grounded on 42 interviews with the management and employees of 13 out of the 14 companies analysed in WP5 policy trail research. On average 3 interviews were conducted during research trips to their locations but also via telephone.<sup>8</sup>

### 4.2 Employability and other reasons for developing workplace learning

The analysis of the relationship between internal and external circumstances encouraging lifelong learning in companies contributes to the public policy debate within the EU about how employability links to employers' investment in workplace learning.

On the one hand, the notion of 'employability' entails the understanding that whatever changes in the structure of the labour market, individuals have to make sure that they qualify for employment over time by engaging in lifelong learning activities. As put by the oft-quoted European Employment Taskforce's report chaired by Wim Kok: "Workers, if they are to remain and progress in work, need to accumulate and renew skills regularly" (2004, p. 10).

On the other hand, advocacy for adopting a flexicurity model at the European Union (EU) level entails the claim that maintaining a well-educated, skilled and adaptable workforce enhances the productivity of enterprises and business competitiveness. Therefore enterprises, – and not just individuals –, should also take responsibility for fomenting the employability of the workforce by cost sharing their employees' participation in lifelong learning.

<sup>8</sup> One company declined to participate in interviews after having taken part of LLLight'in'Europe's complex problem solving skills test. More information about these companies and WP5 policy trail research is available in LLLight'in'Europe's report 14 Lifelong Learning Policy Trails.

This applies even if, the European Commission argues, they “may be discouraged from investment in skills because trained staff may be recruited by other employers” (COM (2007) 359 final, p. 6).

However, the interview data upon which this chapter is based does not provide any evidence of enterprise management ‘fears’ to invest in lifelong learning because employees might leave. There is also no evidence that employees perceive that they need to pay or end up paying for ‘extra’ continuing education and training because their employer ignores their individual learning needs and/or demands. To the best of our knowledge, all the interviews that we conducted were with company owners and employees whose work contract was permanent. This can explain why the link between lifelong learning and employability was not made in their statements about lifelong learning. In general, these statements have in common an appreciation of the importance of lifelong learning for professional development as well as for responding to business needs and new circumstances.

There is nonetheless variation across the interview data in relation to the following:

- what motivates managerial decisions about what type of lifelong learning activity (formal, non-formal and informal learning) employees are to prominently participate in;
- preferences for more or less structured lifelong learning practices within the company.

Each of these two cases is examined in more detail in the next two sections.

### **4.3 Circumstances shaping types of learning and employers’ investment in lifelong learning**

There is a relationship between types of learning and higher or lower direct investment in lifelong learning activities. By types of learning it is meant formal, non-formal and informal learning. Drawing on Werquin (2007), these are defined as follows:

- **Formal learning** is an organised and structured learning activity, usually with explicitly stated learning objectives. Typically, it takes place within a formal education setting regulated by public authorities. It leads to an officially recognised academic and/or professional title or certificate of proficiency level.
- **Non-formal learning** stands for an organised and structured learning activity. It is however an activity that is carried out without the purpose of obtaining an academic and/or professional qualification or certificate. It most often refers to the kind of learning encouraged in a continuing education or training course such as a course on a new method for diagnosing market trends or a workshop on how to use a software programme.

- **Informal learning** is not organised and has no set learning outcomes. It comes from the daily experience and daily activities of a person. Participation in social events and professional networks' initiatives, undertaking collaborative projects and interacting with colleagues are key aspects of informal learning.

Bearing these definitions in mind, it can be understood that encouraging and facilitating informal learning in an enterprise environment is less costly than sponsoring the upskilling of employees through for example paying for their Master studies either in kind or in paid working hours. It is also less costly than implementing a human resources strategy wherein employees must or have the option to participate in non-formal learning activities organised by the company.

Table 3 gathers the various learning activities that interviewees report to take place in their work environments according to types of learning. What has been identified in this study to be the primary motivation for organising and engaging in these different activities is presented in the last column. The motivations legal compliance, collective agreements, HR policy and doing the job are highlighted in order to draw attention to their frequency and relationship with types of learning and therein levels of investment in lifelong learning activities.

Legal compliance and collective agreements reflect the influence of external circumstances in lifelong learning practices at the enterprise level. Because they emanate from the public policy environment of specific enterprises, they could be considered under the same analytical category. However, the distinction is helpful for gaining more detailed insights.

Legal compliance in Table 3 refers to a government decision related to the regulation of professions in the national territory where the company is based. As it can be observed this affects both the level of formal education employees have to attain or have had to attain and the management of non-formal training programmes. The latter is a consequence of a legal requirement to facilitate employees a minimum number of training hours per year. Collective agreements in turn may not mean a legal obligation under the surveillance of the state. Depending on the national institutionalisation of this practice, abidance can only be relevant for ensuring continuity as a member to a professional association (see Chapter 2 of this report).

In our study, 2 enterprises in the health care sector are to meet legal requirements concerning lifelong learning for their health care professionals (care givers and doctors). Collective agreements shape the management of professional development at 2 architectural companies and at 1 one metalworking company. Although these five companies are differently located (Denmark, Italy and Germany), it is remarkable that these external regulatory mechanisms are similarly institutionalised and implemented.

Table 2. Types of learning and primary motivations

Reported in 42 interviews with employees		Primary motivations
<b>Formal</b>	Obtain a Master title	Management adaptability to new business circumstances
	Obtain a vocational education certificate	Legal compliance
	Attend certified English courses	Facilitate a job benefit
	Study leaves and sabbatical year	Company HR policy
<b>Non-formal</b>		
	Annual plan for participation in training courses	Legal compliance
		Collective agreements
		Company HR policy
	Occasional participation in training courses	Job-related knowledge update
		Job-motivated demand for external expert assistance
		Company HR policy
	In-company lectures given by hired experts	Job-related knowledge update
	In-company lectures given by employees	Increase sale opportunities by being aware of internal fields of expertise
		Company HR policy
<b>Informal</b>		
	Coaching tertiary education students/trainees	Indirect knowledge update opportunity
		Potentiate adequate recruitment
		Participation in dual vocational education system

	Coaching and mentoring colleagues	Doing the job
	Participation in industry-related conferences and seminars	Identify business opportunities
		Networking
	Peer learning (project-based internal and/or external collaborations)	Doing the job
	Self-study and research	Doing the job
	Shared knowledge data base	Support optimal self-study

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In our study, 2 enterprises in the health care sector are to meet legal requirements concerning lifelong learning for their health care professionals (care givers and doctors). Collective agreements shape the management of professional development at 2 architectural companies and at 1 one metalworking company. Although these five companies are differently located (Denmark, Italy and Germany), it is remarkable that these external regulatory mechanisms are similarly institutionalised and implemented.

HR policy in Figure 1 stands for internal managerial decisions regarding human resources and professional development. It implies that the company has a specialised HR structure or HR professional organising in a systematic manner a range of training opportunities for employees. It is different from adopting a couple of HR management practices. For example, under the circumstances of the above mentioned collective agreements, managers or team leaders are expected to establish an annual individual training plan. As observed in our research, this may occur in the absence of a HR structure and of a defined HR strategy.

Figure 1 also indicates that HR policy can motivate 'occasional participation in training courses'. In doing so, it accounts for a HR professional development strategy consisting of an annual internal assessment of training needs followed either by the development of what an interviewee terms "ad hoc training paths" (C6 Manager, Germany, I16-Man-DE, 16/07/2013). These refer to training objectives that are expected to be met in a flexible way insofar as they are viewed as being adjustable to the emergence of new business needs (for example, a customer orders a particular service) or of new technological developments (particularly, in the case of software developers). 'Occasional participation in training courses' equally refers to the design of an offer of internal training courses for all employees to choose from. Attending these courses is optional.

Finally, it can be observed in Figure 1 the variety of forms of informal learning reported and their close connection to the job demands. In fact, interviewees generally perceive these instances of informal learning as being constitutive of their labouring; a consequence of being engaged in doing the job. The excerpts from two interviews below illustrate the declared role that the job itself plays in encouraging lifelong learning.

*"If you develop a technology normally you also develop the employees, but the focus and the starting point is always the technology development [...] It's like lifelong learning [...] There is a new technology, there is not enough qualification resources from the manufacturers of the technology, so I have to train myself in C2 for using this technology to be better than the competition of C2 in using this technology." (C2 Software Developer, Germany, I14-Dir-DE, 10/12/14)*

*"For the job we do here, training does not always mean a formal course with defined hours and in a defined place. No! It is many times triggered by new information that requires reading, search on Internet, talking to other colleagues, going to certain conferences and talks. For all of this, one has to have personal initiative." (C10 Management Consultant, Spain, I2-Dir-ES, 08/07/14)*

Taken together, the analysis of the interview data in Figure 1 leads to four main observations:

- Legislation and collective agreements are elements in public policy environments which enforce individual enterprises to invest in more costly and structured types of lifelong learning.
- Although these instruments can entail the adoption of a particular HR management practice, the annual establishment of a training programme based upon an assessment of business and individual employees' learning needs, the existence of a HR professional development policy within the company cannot be assumed.
- Companies which have in place their own HR policy prominently facilitate the same types of lifelong learning opportunities as those promoted via legal and collective agreements instruments. HR policy does not appear to have a significant impact on informal learning activities in the workplace.
- The range of primary motivations for engaging in learning activities show the prevalence of a connection between what is learned and what needs to be learned for the development of tasks and business activities within a specific company. This suggests a tension between the emphasis placed on the individual in the rationale behind the promotion of employability in public policy processes and the actual circumstances of co-working and co-learning as an employee at an enterprise in the private sector.

#### **4.4 Decision-makers in lifelong learning: the sector matters**

While an analysis based upon types of learning helps identifying the role external circumstances can play in shaping and securing lifelong learning for employees, it does not capture how those circumstances combine with employees' positions in relation to the kinds of learning activities they may find more relevant to engage in for doing their jobs as well as for their overall development.

This is an element that emerged in the interview data as being of significance to account for. It relates to individual preferences and eventually to the possibility of making an individual choice about what to learn and be trained for over time.

First of all it is an element that calls attention to the participation of individual employees in decision-making processes about lifelong learning in their workplace. Apart from external regulators (legal compliance and collective agreements) and company managers (HR policy), individual employees can equally be decision-makers in an entrepreneurial context.

Certainly, individual employees can be decision-makers if there is room in their work environment to take individual initiative with respect to what, when, how and why to meet their learning needs in the course of a work life.

As an exemplification of the role individuals can play in these dynamics, the following is a comment on the publicly available training offer for architects in Italy. Participation in training is compulsory for securing membership to the Association of Architects and thereby for securing the success of an architectural firm:

*“The offer is low because our academic world teaches you how to study and it teaches you how to design projects, but it does not prepare you to apply it in a real world where the variable that you can use least of all is money [...] I realised that 92 per cent of my colleagues are not aware of how to manage money, that in a market like ours that creates objects worth millions, it would be useful to know.” (C36x Architect, Italy, I60-Dir-IT, 13/05/2015)*

The above communicates a clearly articulated view on what kinds of lifelong learning activity would be of interest to participate in.

The capability to develop an argument about lifelong learning opportunities available in one’s work environment is nevertheless related to the education level of each individual. In the interviews conducted at C12, a care home in Spain where the major part of the personnel has a low level of formal education attainment (for more details see Chapter 2 of this report), the following statement illustrates this point:

*“Honestly, there is little demand for training here. We have done surveys asking what training you would like to participate in, and we noted that it was hard for them to answer this question. Some told us: ‘Whatever you want is good!’ I believe that for some of the care assistants not having any training at all would feel as something that was more convenient for them. This is not a generalised thing. But it exists.” (C12 Psychologist and Head of Care Givers, Spain, I9-Man-ES, 14/07/2014).*

Based upon the available research data, the relation between individual autonomy in relation to lifelong learning and education level is made explicit in Table 3.

Table 3: Prevailing lifelong learning decision-makers per sector and company size

<b>Architecture</b>			
C8 - Medium	External regulation		Individual initiative
C36x - Micro	External regulation		Individual initiative
<b>Food supply and distribution</b>			
C23 - Small		HR policy	

<b>Health care</b>			
C4 - Medium	External regulation	HR policy	
C12 - Medium	External regulation	HR policy	
<b>Industrial production</b>			
C1 - Big		HR policy	
C5 - Big		HR policy	
C7 - Big	External regulation	HR policy	
<b>IT industry</b>			
C2 - Small			Individual initiative
C3 - Medium			Individual initiative
C6 - Big		HR policy	Individual initiative
<b>Management consulting and business training</b>			
C10 - Small			Individual initiative
C14 - Big		Policy	Individual initiative

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Based upon the available research data, the relation between individual autonomy in relation to lifelong learning and education level is made explicit in Table 3.

Figure 2 highlights the sector of activity of each company where interviews with employees were carried out. The sectorial differentiation constitutes an analytical means to pointing to the education level of the recruited personnel but also to the nature of the work carried out. In the Health Care sector, individual autonomy among for example doctors may be acknowledged. Nevertheless, it is a sector where job performance is strongly linked to the meeting of ongoing learning needs deriving from developments in medicine research and pharmaceutical industrial production. In this sense, the selection of what to learn and how to learn is strongly constrained by the dynamics of the professional field and the reliance on authoritative sources of knowledge. This is not comparable to the work developed in the Architecture, IT industry and Management Consulting sectors which has at its heart the ability to create new products and/or to innovate. In these sectors, the majority of the recruited staff is highly qualified and it can be observed that individual autonomy vis-à-vis meeting learning needs is facilitated by the enterprise management. The most common forms of autonomous engagement in lifelong learning activities in these cases are self-study and peer-to-peer learning. When there is a combination of HR policy and individual autonomy prevails as at the big companies C6 and C14 (see Figure 2), the former supports the latter through for example facilitating employees a range of training courses to choose from (see Section above), study leaves of 2-3 days per year and organisational knowledge sharing strategies. Individual autonomy without HR policy constitutes a common feature among smaller companies<sup>9</sup> than C6 and C14 and alludes to the prevalence of unstructured individual decisions about how to meet learning needs triggered by project-based work.

In the case of companies in the sectors of Food Supply and Distribution and Industrial Production, it can be observed that individual autonomy is not noted. This is because it is less dominant than the HR structure and management in place with respect to the framing of lifelong learning purposes, the decision-making about the content of the available training courses and the establishing of differentiated access conditions to learning opportunities. It includes instances of company capacity to train its own trainers and explicitly declare the mission of certain training programmes for all employees as in the case of C1. Also, it considers instances of a combination of mandatory and voluntary participation in lifelong learning activities where the voluntary aspect is internally monitored as in the case of C23. Taken together, they are circumstances that reflect a significant and structured employers' investment in lifelong learning but also a prevailing managerial vision of what learning needs are to be met, by whom they need to be met and how they are to be met.

<sup>9</sup>The definition of company size follows the EU's definition of company size and takes only into account the number of employees (European Commission, 2015). This means that a 'micro' enterprise has less than 10 employees, a 'small' enterprise less than 50 employees, a 'medium' less than 250 employees and a 'big' enterprise more than 250 employees.



The location of the studied companies that are listed in Figure 2 is arguably an unimportant factor in this analysis. Despite variation in how public policy can foment lifelong learning opportunities for employed individuals in different national territories ('External regulation' in Figure 2), there are transnational similarities in how enterprises that do business in the same sector utilise those opportunities and combine them with other internal circumstances, namely the acknowledgment of the capacity of their employees to be autonomous lifelong learners.

This equally applies to an analysis based upon company size. It is shown that company size is of less relevance for a generalisation of our research results. For example, the studied big companies in the Industrial Production sector contrast with a big company in the IT Industry sector in terms of how the latter integrates individual initiative in its management of lifelong learning opportunities.

#### **4.5 Conclusions and key messages**

Overall, the examination of the relationship between external and internal circumstances encouraging lifelong learning at the enterprise level in this chapter suggests that national regulatory mechanisms affecting certain professions such as architects or care givers can play a role in conditioning enterprise provision of lifelong learning opportunities for their employees. However, these circumstances invariably combine with enterprise autonomous decisions about the what, how, when and why of encouraging their personnel to tackle lifelong learning needs. Decisions in this respect can be more prominently made by the management of the enterprise or by the individual employees. Co-decision making significantly affecting lifelong learning practices is not generalised across all companies.

Indeed, an analysis per sector of business helps explaining variation in more or less encouragement within the enterprise for individual autonomy in relation to learning, professional development and ultimately employability. It accounts for the education level of the personnel but also for qualitative differences among professions and required job performance. Furthermore, by considering the presence of a structured management of human resources in this analysis, attention is drawn to the acute sense developed within companies in relation to how to foment the participation of their employees in various lifelong learning activities.

Bearing the above in mind, it can be concluded that public policy initiatives deliberately aimed at facilitating as well as at influencing approaches to lifelong learning in the entrepreneurial private sphere may be prone to ineffectiveness when being exclusively based upon for example the company size factor. To improve lifelong learning public policy programmes targeting companies and public and private investment in lifelong learning for employability, it is recommended the further development of research that addresses the complexity of the combining effects of regulatory instruments and decision-making and practices within companies. In particular, that accounts for the following key findings in this study:

- 
- High skilled requirement and high skilled outputs shape the approach to lifelong learning in companies. This is marked by a preference for informal learning activities which require less investment. Public policy exercises no influence in engagement in informal learning within companies.
  - When there is a HR function that deals specifically with training needs, professional development and lifelong learning are strategically driven by the company. Public policy exercises little or no influence in this case.
  - Professional regulations can constitute an external intervention in how participation in lifelong learning is managed at the company level. However, when they affect highly skilled employed individuals, they are prone to being perceived as generating training obligations that do not correspond to actual learning needs.
  - Developing sectorial analyses would help differentiating the kinds of learning that are valuable in accordance with the service/product provided and the professional knowledge and skills required. Problem solving skills for example are not the most valuable in every sector. This differentiation is of relevance for adjusting public policy programmes to real learning needs as well as for informing training providers in both the public and private sectors.

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## PROJECT IDENTITY

LLLight'in'Europe is an FP7 research project supported by the European Union, which has investigated the relevance and impact of lifelong learning and 21st century skills on innovation, productivity and employability. Against the background of increasingly complex tasks and jobs, understanding which skills impact individuals and organizations, and how such skills can be supported, has important policy implications. LLLight'in'Europe pioneered the use of an instrument to test complex problem solving skills of adults in their work environment. This allowed for the first time insights into the development of professional and learning paths of employed individuals and entrepreneurs and the role that problem solving skills play. Additionally, LLLight'in'Europe draws on a series of databases on adult competences from across the world to conduct rich analyses of skills and their impact.

These analyses were conducted in concert with different disciplines. Economists have been analyzing the impact of cognitive skills on wages and growth; sociologists have been investigating how public policies can support the development of such skills and lifelong learning; innovation researchers have been tracking the relationships between problem solving skills, lifelong learning and entrepreneurship at the organizational level;. educational scientists have investigated how successful enterprises support their workforce's competences; cognitive psychologists have researched on the development and implications of cognitive skills relevant for modern occupations and tasks; and an analysis from the perspective of business ethics has clarified the role and scope of employers' responsibility in fostering skills acquisition in their workforce. The team has carried out its research and analyses on the value of skills and lifelong learning in EU countries, USA, China, Latin America and Africa.

The result is a multi-disciplinary analysis of the process of adult learning and problem solving in its different nuances, and of the levers which can support the development of these skills for both those who are already in jobs, and for those who are (re)entering the labor market, as well as the development of effective HR strategies and public policy schemes to support them.

Coordinator	Zeppelin University
Project Director	Peer Ederer
EU Project Officer	Monica Menapace
EU Contribution	€ 2,695,000
EU Project #	290683
Project Duration	January 2012 – September 2015

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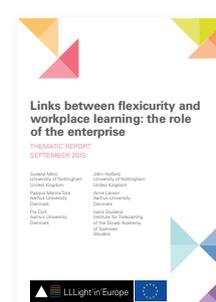
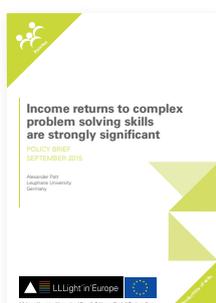
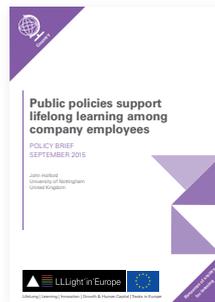
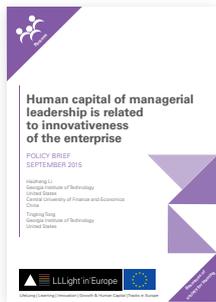


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These **28 reports** together are the publication suite presenting the results of the LLLightinEurope project, and can be downloaded at [www.lllightineurope.com](http://www.lllightineurope.com)