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VOCATIONAL TRAINING  
IN RESEARCH  
AND PRACTICE

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## Vocational training in an international context

Federal Institute for  
Vocational Training

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IN AN INTERNATIONAL  
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## Strengthening international co-operation in vocational training

► The process of internationalisation has gained increasing momentum over the last few years, encompassing broader areas of society and placing new demands on vocational training. Up until the end of the 80s aggregate conditions at the national level tended to determine how vocational training systems were organised. There was no pressing reason to conduct any systematic analysis of vocational training abroad or for cross-border co-operation. The situation has changed fundamentally due to the growing globalisation of the economy and the accelerated pace of European integration towards the goal of a common educational and employment market. National systems of vocational training are caught in the line of fire between international competition on the one hand and the need for cross-border co-operation on the other.

At the same time, there are increasing demands for internationalism and a European orientation in the structuring of vocational training. As one important factor in international competition to attract new enterprises, national educational and vocational training systems, their quality and innovative ability have come under scrutiny. The need for development and modernisation as well as the concerted campaign bearing the title of "International educational marketing for Germany as an educational and research location", recently initiated by the Federal government and the *Länder*, necessitates transnational projects, partnerships and international networks in order to generate innovative and organisational impetus. Learning from one another, co-operating as partners, passing on experience and examples of good practice have become essential principles in vocational training policy and vocational training practice.

### BIBB DEVELOPS COMPETENCE PROFILE IN INTERNATIONAL VOCATIONAL TRAINING

The Federal Institute for Vocational Training (BIBB) has also had to adapt to these conditions in its activities in the area of international vocational training. The BIBB has had a mandate to engage in international vocational training work since 1994 by

statute. Under the provisions of the Vocational Training Promotion Act, the BIBB is required to take part in international co-operation in vocational training in accordance with the instructions of the respective Federal minister in charge of this domain. A glance back over the last six years shows that Europeanisation and globalisation have not only had a decisive and highly dynamic effect on the demand for international competence in vocational training. Demands relating to quality and professionalism in international activities have also increased significantly.

The Federal Institute's activities over the last few years have also helped it develop a certain degree of competence in the area of international vocational training. This competence is based on the following in particular:

- BIBB's long-standing function (since 1989) as a national co-ordination agency for EU vocational training programmes and Community initiatives and the assignment of these activities to the National Agency - Education for Europe under the aegis of BIBB in 2000;
- the growing involvement of various specialised BIBB departments in European projects (incl. European Commission projects co-funded by the EU vocational training programme LEONARDO);
- consultation and support for projects in eleven reform states of central and eastern Europe within the framework of the German TRANSFORM programme;
- international projects with Turkey (activity funded by Germany), the People's Republic of China, the United States and Australia;
- international comparative research projects and major studies in co-operation with the OECD, the CEDEFOP and the European Training Foundation as well as
- a series of bilateral academic and vocational training policy seminars, numerous lectures abroad, academic exchange and the short-term visits by experts to developing and newly-industrialised countries.

The great political importance accorded to international co-operation in vocational training as well as the growing quantitative and qualitative demands being placed on international vocational training research and practice have forced BIBB to focus its international activities. This has also at the same time involved selective further development of know-how, the guaranteeing of a high degree of professionalism in applying development methods and tools when consulting in the area of international vocational training and increased initiative in international educational marketing. A competitive international vocational training market has existed for some time now - a supply and demand-based market for systems consulting, the development of training profiles and appropriate teaching and learning materials. Heterogeneous international competency in tandem with country and regionally-specific knowledge is required to meet the demands of this market. It is only in this way that the Federal Institute can continue to be an attractive, capable partner in co-operation.

#### MAIN EMPHASES OF THE INTERNATIONAL WORK OF THE BIBB

Due to the need for BIBB to focus its efforts at the international level and its desire to strengthen co-operation with other national partners, a *Plan for the concentration of BIBB's international work over the medium term* was developed and discussed with the BMBF and the Board of the Federal Institute. This plan sets out the following fields of activity:

- All the advanced industrialised countries are increasingly examining international vocational training in terms of comparative labour market and economic development. This is seen to be a useful tool for assessing the quality, efficiency and "future fitness" of their own systems. This approach has also been found to help improve or overhaul structures, the substance and methods of national vocational training. The BIBB wants to find those areas most urgently in need of reform by means of **international comparative and transfer research** and outline appropriate solutions.



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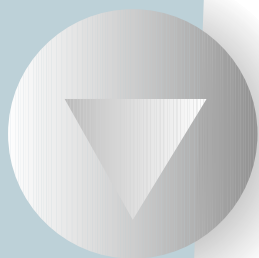


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- Despite the shift in paradigm from harmonisation to transparency which has taken place, the EU continues to provide an important framework for German vocational training. The BIBB wants to support political efforts promoting German interests in the development of **strategic concepts at the European level** and to create an **awareness of the problems associated with the effects of Community measures** on German vocational training. EU vocational training programmes play a considerable role in this.
- Resolute internationalisation is being raised to a national strategy in industrial countries. Under the pressure of advances in international integration, the German system cannot shun this orientation either. The BIBB wants to help make the German system congruous with other systems by **transmitting of international content matter**.
- The BIBB is involved in a web of relationships with other countries and foreign partner institutions. The BIBB wants to enhance this **co-operation** and strengthen international networks.
- All advanced industrialised countries/service societies are attempting to influence the organisation of vocational training in the reform states, newly-industrialised and developing countries. *This means the BIBB is in competition with other suppliers of educational services.* The **dual approach** is considered throughout the world to be an effective basic model for vocational training. The BIBB wants to display its advantages in an **aggressive manner** without, however, pushing a crude "export" of the model.
- To be able to carry out the above-mentioned tasks in a competent manner, the BIBB must continue to develop the **methodological prerequisites** for international **vocational training consulting**, in order to guarantee a high standard of professionalism and quality in consultative work.
- The BIBB wants, within the framework of the concerted action "International educational marketing for Germany as a location for education and research", to contribute to making **German vocational training internationally communicable**. This will necessitate increased efforts being devoted to finding effective ways of adopting the German system (instead of a crude one-to-one transfer).

The plan for the further development of international work relates to all areas of the BIBB, including the National Agency - Education for Europe. In addition, it is necessary to develop an overall national strategy which integrates the actors in international vocational training work, such as the Federal Ministry of Education and Research (BMBF), Federal Ministry of Economics (BMWi), Federal Ministry of Economic Co-operation and Development (BMZ), Gesellschaft für Technische Zusammenarbeit (GTZ), Carl Duisberg Gesellschaft (CDG), German Foundation for International Development (DSE), Foundation for Economic Development and Vocational Training (Sequa), etc.. The goal should be co-operation and complementary action based on a division of labour. ■



## Internationalisation of the dual system of vocational/educational training - strategies and demands

► The internationalisation of the economy beyond the Single European Market towards a global network of small and medium-sized enterprises requires a new strategic orientation in qualification policy. In addition to third-level colleges, the dual system of vocational/educational training is also being challenged by these new demands, both structurally and as regards content, since the quality of educational systems is a significant factor in where enterprises decide to settle. There is a considerable need for the dual system to play catch-up with regard to international elements, including in comparison to other European countries. An additional hour of foreign language instruction is not enough. This article shows the possible range of structural and regulatory changes.

### Internationalisation of the economy

The Federal Republic of Germany has a great deal of experience in the international economy. For quite some time, however, only a limited number of employees in companies operating in this sphere have been confronted with the occupational demands emanating from this sphere. These employees often had a third-level education.

Meanwhile, international integration has been gaining momentum. Enterprises

- are integrated into internationally-organised groups of affiliated companies or at least have an international ownership structure,
- concentrate on their "core business" - but want to be world market leaders or at least have a significant share of the market in this core business,
- produce components for their products all over the world or purchase them globally,
- produce products with the know-how (production documents, formulas and procedures) of customers from different countries,
- recruit their specialists from a global labour market or award contracts to internationally-active service providers.

Product-related service, for example, needs to be guaranteed world-wide as a consequence of the international division of labour. Defects which cannot be remedied locally are rectified by factory experts. Global sourcing forces quality management processes to also adopt a cross-border structure. Due to the increased trend towards flattening out hierarchical matrixes by companies, employees are being directly confronted with international demands - after the office, internationalisation has now arrived in the workshop.<sup>1</sup> Skilled workers with vocational training qualifications are increasingly affected by this trend, particularly in small and medium-sized enterprises.<sup>2</sup>



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## Requirements on the job: from international qualifications to network competence

The Federal Institute for Vocational Training (BIBB) has been studying the consequences of the internationalisation of the economy for qualifications since the mid-nineties. Initial work focused on defining international qualification and its content matter along with ascertaining the demand for it. This led to the development of the concept of international qualifications.

Accordingly, companies expect from their skilled staff working in the international sphere foreign language and

intercultural skills along with outstanding specialised knowledge<sup>3</sup>. This is seen to be a holistic qualification, encompassing economic and organisational skills in addition to technology-related qualifications. Staff also require a certain psychological and physical fortitude for

stays abroad. And finally a management and social policy mission is inherent in this in the sense that culturally-related conflicts can be resolved through intercultural learning, both within the company and externally.<sup>4</sup>

Internationally and nationally-organised enterprises have to function smoothly, even when their employees come from different cultural groups. This presupposes at a minimum a respect for different types of behaviour rooted in cultural and religious values when working together - an attitude which is not to be taken for granted in German society. Cultural differences can also act as an engine of enterprise-related synergy effects. In the case of sales and service-oriented enterprises or departments, there is, in addition to various types of customer behaviour rooted in cultural and religious values, also their cultural and legal practices as well as expectations concerning products and service.

International mobility is both physical and virtual. The relationship is mediated through technical possibilities (remote maintenance, etc.). Technical and communicative competencies blend. Going abroad remains a necessary international activity - if one which increasingly requires justification - as certain results can only be achieved through direct contact.

The concept of international qualifications<sup>5</sup> is useful for many enterprises in the early stages of internationalisation. The concept will have to be enlarged by means of a new concept that one could refer to as "network competence"<sup>6</sup> in future as a consequence of dynamic developments at the workplace, including the possibilities offered by the Internet.<sup>6</sup> (see box) This competence cannot simply be reduced to technical skills with intranet and Internet, which is to say in working with networks. It is characterised by the in-

herent absence of borderlines, thus requiring staff to have the ability to work successfully in networks, and above all the ability "to think and act in an integrated (networked) manner". Language, asynchronous communication and confidence-building on the net are new demands. This also implies indirect contact with people of another culture. Expressions of a new "digital" culture could eclipse the ethnic element to thus - perhaps - open up new forms of trans-cultural communication.

It is important that all these dimensions be included in a *comprehensive concept of qualification for international activities* and that the requirements by no means simply be reduced to foreign language skills.

## International aspects in the regulatory means of the dual system

Although the system of dual vocational/educational training is oriented towards work processes, it has proved relatively resistant to the demands of the internationalisation and, increasingly, globalisation of economic activity. In industrial-technical occupations the international dimension was hardly dealt with in the past. In more recent training regulations, the topic of foreign languages has been reduced to the reading and evaluation of English-language regulatory works and handbooks, the use of technical terms in conversation and supplying simple information.

More comprehensive communicative competencies exist only in special customer-oriented occupations such as Railwayman/woman in operational service (test statute 1991) or its successor, Transport services clerk, as well as for the occupation of Travel agent. Intercultural competencies play almost no role in training statutes.

Regional, company and branch-specific special solutions within and on the margins of the dual system of vocational/educational training are being created independent of the regulatory procedures.<sup>8</sup> Examples are tri-national initial vocational training in the geographical area where Germany, Switzerland and France meet, or training models in the chemical industry which combine initial vocational training courses with third-level studies and internationally-recognised qualifications (MBA).

In this situation, it would seem necessary to take international requirements into account in the regulatory system of the dual system of vocational/educational training and to include international qualifications as a minimum requirement

- in order to present the necessary new qualifications to companies in good time, well aware that qualification processes in vocational training also require a preparatory period lasting years;
- in order to improve prospects for people graduating from the dual system of vocational/educational training in the

### Network competence

Comprehensive competence - not merely technical competence - in dealing with the variety of communications technologies, in particular the Internet as the principal cross-border medium. Ability to think and act in a networked (integrated) manner.

## Formulations in selected training regulations

	<b>Railwayman/woman in operational service:</b> provide information in a foreign language
	<b>Film and video editor (m/f):</b> evaluate equipment and software descriptions in German and English
	<b>Media designer image and sound (m/f):</b> communicate with those involved in the production, especially... use specialist production technology terminology in German and English evaluate software and equipment descriptions in German and English
	<b>Forwarding clerk (m/f):</b> use foreign language technical expressions fill in forms and draw up documents work with foreign language standard texts provide simple information
	<b>Aircraft electronics technician (m/f):</b> read and apply English technical texts
	<b>IT occupations:</b> evaluate information sources, in particular technical documents, documentation and manuals in German and English in a task-related way hold situationally-appropriate conversations and present facts use German and English technical terms
	<b>Transport services clerk (m/f):</b> use foreign language technical terms apply foreign language standard texts in a situationally-appropriate manner provide customers with simple information
	<b>Mechatronics fitter (m/f):</b> hold conversations with supervisors, colleagues and in a team in a situationally-appropriate manner present facts use German and English technical terms
	<b>Microtechnologist (m/f):</b> read and apply operating instructions and directions ... in German and English information sources, in particular documentation ... in German and English
	<b>Publishing house clerk (m/f):</b> use foreign language terms and standard texts evaluate the usual foreign language information in training firm
	<b>Bank clerk (m/f):</b> international money transfers: advise customers on the choice of instruments of payment process business operations in tourist money transfers describe the handling of documentary collection and documentary letters of credit explain risks in foreign currency payments and possibilities for bank hedging
	<b>Car salesperson (m/f):</b> use foreign language terms use the usual foreign language terms in training firm provide information, also in a foreign language
	<b>Bookseller (m/f):</b> use foreign language terms evaluate usual foreign language information in training firm
	<b>Specialist in the hospitality services industry (m/f), Restaurant specialist (m/f), Specialist in the hotel business (m/f), Hotel clerk (m/f), Professional caterer (m/f), Cook (m/f - 1st year):</b> use occupationally-related foreign language terms
	<b>Hotel clerk (m/f), Professional caterer (m/f - 3rd year):</b> provide simple information in a foreign language
	<b>Travel agent (m/f):</b> use foreign language technical terms correspond and communicate in a foreign language in typical situations in the training firm use foreign language information material available in the training firm
	<b>Service employee in air traffic (m/f):</b> take into account the cultural background of the customer in communication use technical language use standard English texts provide information in a foreign language

struggle for international jobs, especially in regard to graduates of technical colleges and colleges of advanced vocational studies;

- in order for Germany to be successful as a location for business in the global competition between enterprises for qualification potential. Other European countries such as Denmark or the Netherlands have intensified the internationalisation of their educational systems - general as well as vocational - on a massive scale over the last few years;
- in order to move forward in the modernisation of what is a markedly enterprise-organised initial training system in comparison to other European systems, which are primarily school-oriented. Inability of the dual system to make the required dynamic changes in this process of globalisation would be fatal.

There are signs of political change at present:

- The "Initial and Further Vocational Training" working group of the Alliance for Work, Training and Competitiveness deemed the acquisition of foreign competence necessary for flexible deployment on the German and European labour markets in their resolution on the subject of "Structural further development of the dual system of vocational/educational training" of 22nd October 1999. Training-related stays in other European countries were one of the primary recommendations. The participants now want to make the participation in exchange programmes as well as the completion of training periods abroad easier by making appropriate changes in training systems.
- At their special summit on 23-24 March 2000 in Lisbon, the EU heads of state and government assigned education and training prominent status in the project to make the EU into the most competitive and dynamic knowledge-based economic zone in the world in the coming decade. To this end, the working group called for efforts to determine what basic skills are required in a European setting (IT skills, foreign languages, etc.), the promotion of mobility and increased transparency in the recognition of qualifications.
- The Electrical Engineering Industry Federation and the IG Metall trade union concurred in an "General agreement on the revision of industrial electrical engineering occupations" under the rubric of "European competence" that:

The social partners approve of international exchange programmes for trainees and recommend to enterprises their participation in relevant programmes. In line with the Europeanisation and internationalisation of the economic and labour markets, the English language should be firmly established in the training regulations for all occupations. The social partners expect that the vocational schools will develop a suitably broadened language instruction. In addition,

*Internationalisation is  
a significant factor influencing  
where companies decide to locate*

tion, an understanding of other cultures should be promoted in vocational training.

- The argument that the integration of an international dimension in vocational training would "hamper training" and thus aggravate the situation on the training places market is, in view of declining demand, at least in the western Länder, no longer tenable.

These approaches should form the basis for the comprehensive introduction of international qualifications, in the end encompassing the dual system as a whole.

### **Possible strategies for the introduction of international qualifications in the training system**

The following measures have been proposed in the current discussion:

- implementation of foreign language instruction;
- intensification of exchange measures, for example through EU programmes.

Foreign language instruction is seen primarily as a job for the vocational schools.

In our opinion, however, within the framework of the dual system of vocational/educational training, enterprises are also the primary learning venue for the acquisition of international qualifications. This is not about the implementation of language courses, but rather about involving trainees in international business operations - through direct contact with foreign customers, including the furnishing of economic output abroad. Practical opportunities for the internationalisation of vocational training in enterprises are dependent upon their actual situations and strategic goals. The degree of training organisation and internationalisation is crucial. Overview 1 shows contingent opportunities for action.

### **SUGGESTIONS FOR VOCATIONAL SCHOOLS**

The vocational schools have an independent and important function in imparting international qualifications despite the absence of any close ties with enterprises. This should not - as has been previously the case in practice - lead to international qualification being reduced to the subject "foreign languages" and thus at best to the perpetuation of the language instruction provided in general educational



schools. In order for international qualifications to be taught in an activity-related manner - and this primarily involves English and intercultural competencies - general educational instruction and vocational instruction must be interlinked. In this way, problems and their solutions can be dealt with in a holistic manner - including communicative (German and English), economic (business studies) and ethical aspects. Pilot projects have shown that these kinds of concepts are will be adopted both by companies providing training and vocational school students and that calls for the elimination of certain subjects, such as religion, will be silenced.

The international dimension must - if it is to be taken seriously - receive a mark in examinations. Making language instruction an elective course does not solve this problem and hampers the integration of the topic in the different fields of learning.

Beyond this, the vocational school needs a differentiated model in order to be able to provide an adequate curriculum for students from different educational backgrounds. Only in this way would it be possible to structure regulated occupations in such a way as to make them interesting and educationally relevant for both Abiturienten (higher secondary school graduates) and Hauptschüler (lower secondary school graduates).

What vocational schools can actually do within the framework of international qualification is above all dependent upon the structures of occupations and pupils represented in the schools themselves.

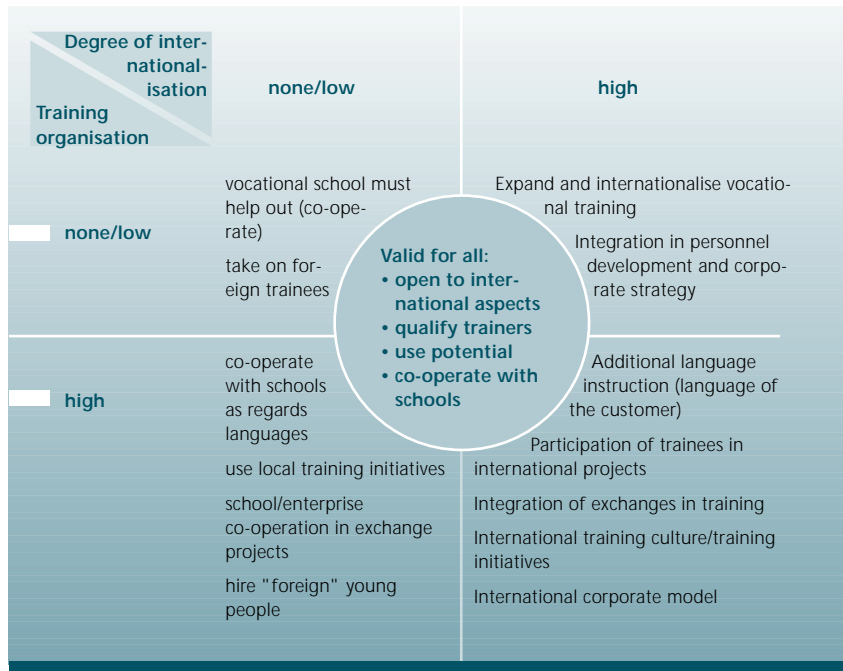
The past has shown that placing demands on learning venues alone is not enough. The changes taking place in the world of work also require changes be made in a whole host of regulations and procedures extending across the entire structure of the vocational training system.

## SUGGESTIONS

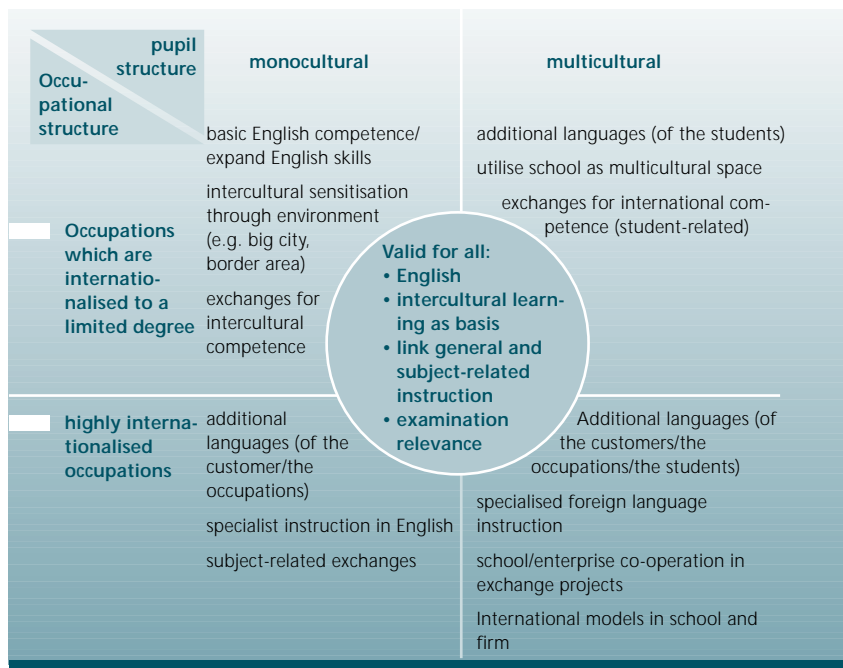
- The **training regulations** are the curricular starting point in firmly establishing an international dimension. These require revision in light of the fact that many occupations require a capacity to act at the international level.
- The international dimension must be assigned an **appropriate place** in the overall syllabi/curricula. This requires a concept agreed upon between the Federal Government and the Länder which changes the previous procedure. The connection between training ordinances and overall syllabi/curricula can no longer be linked to the need for foreign languages in the occupational activity alone. The vocational schools have an independent job to perform within the framework of a strategy of internationalisation.
- Up until now, **general educational instruction** was the sole domain of the Länder. This instruction is also given by general education teachers as a rule - that is to say by teachers who are unable to create a connection to the technical instruction. In future, all instruction should

form a whole and be determined by overall syllabi/curricula drawn up by the Conference of Ministers of Education (KMK).

- The international dimension should be enhanced by making it a **subject of examinations**, both in the training regulations *and* in the vocational schools. The examinations should be structured in such a way as to relate to activity at an international level.
- The organisational models for fulfilling the **obligation to attend vocational school** should be spelled out in such a



Overview 1 Possibilities for action for vocational training in enterprises for the promotion of "network competence"



Overview 2 Possibilities for action by vocational schools for the promotion of "network competence"

way that stays abroad - also of a longer duration - are possible without students confronting any problems as a result during training.

Beyond the actual steering possibilities in the dual system, changes are also required in adjacent educational policy fields:

- The further development of the **continuing training system** should not be limited to linking the vocational training system and the third-level college system. An element of internationalisation could be added by introducing internationally-recognised qualifications (bachelor, masters) in the advanced training regulations<sup>9</sup>, at the same time enhancing the attractiveness of training courses.
- In the area of **teacher training** there is the general problem of qualification for instruction, which is organised according to fields of learning rather than individual subjects. Within the framework of the necessary changes (turning away from specialised teacher training), care must also be taken to ensure that knowledge of foreign languages can be taught in an integrated manner in future. Up until now, English teachers have hardly been able to establish a connection to the technical learning goals, which is what the integrative concept of the KMK actually sets out. They are also generally not in a position to improve the communication skills of the students in English beyond imparting individual technical terms. Composite vocational school teacher training is probably required, organised conceptually along occupational lines. The discussion of bachelor and masters qualifications also promotes systemic internationalisation with regard to teachers.
- As a rule access to **EU programmes** is necessary for international activities in vocational training. What would happen if there were no EU funds for international contacts? The frequently cited "examples of good practice" are indeed important, but at the same time obscure the structural defects of everyday practice. Years of grants hamper the setting of new strategic priorities by the learning venues themselves. In addition, the orienta-

tion towards grant guidelines does not exactly promote content-related creativity and integration in personnel development concepts. What is required is more independent initiative on the part of enterprises, which could also pave the way for the necessary paradigm shift in exchange programmes away from the primary orientation towards international understanding and towards practice-integrated, cross-border projects.

The concept of the systemic integration of the international dimension in vocational training presented here especially makes sense viewed as a whole. The evasive strategies at the various levels which form at times naturally, at times accidentally, or are indeed in some cases structurally promoted, are dysfunctional:

- Creation of new "European" occupations such as "Solar technician for Europe", "car mechatronics", "automobile mechatronic technician", for which there are no regulations;
- Implementation of elective foreign language instruction in vocational schools;
- Use of educational leave for stays abroad;
- Postponement of stays abroad until after vocational training has been completed;
- Shifting occupational requirements to the area of additional qualifications;
- Relocation of the international dimension to full-time school-based training courses and colleges of advanced vocational studies;
- Linking of vocational training with third-level study and thus relocation to the third-level system;
- Use of private language schools;
- Implementation of private stays abroad.

Such approaches have "insulated" the dual system of vocational/educational training from the international dimension both in terms of content matter as well as structurally up until now. If this trend continues, the vocational training system could in this connection easily become an anachronistic remnant of the past. ■

#### Notes

- 1 See also Behr, M.; Hirsch-Kreinsen, H. (ed.): *Globale Produktion und Industriearbeit. Arbeitsorganisation und Kooperation in Produktionsnetzwerken*, Munich 1998
- 2 See Hering, E.; Pförsch, W.; Wordelmann, P.: *Internationalisierung des Mittelstandes. Strategien zur internationalen Qualifizierung in kleinen und mittleren Unternehmen*, BIBB (ed.), Bielefeld 2001

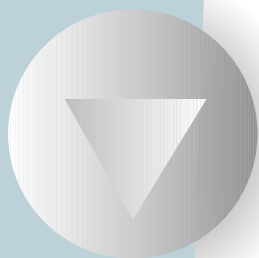
- 3 See Busse, G; Paul-Kohlhoff, A.; Wordelmann, P.: "Fremdsprachen und mehr – Internationale Qualifikationen aus der Sicht von Betrieben und Beschäftigten. Eine empirische Studie über Zukunftsqualifikationen", BIBB, Berlin and Bonn 1997
- 4 There are a series of programmes in this regard, above all in large enterprises. See also the new BMBF programme "XENOS"
- 5 Also to be found in modified form in: Lenske, W.; Werner, D.:

*Globalisierung und internationale Berufskompetenz*, Cologne 2000, in particular p. 28 ff., and is also realised in the qualification of disadvantaged youth (EuroBildungs Chance project of the German Red Cross, Rhineland-Palatinate)

6 See also: Pförsch, W.: *Mit Strategie ins Internet. Qualifizierung als Chance für Unternehmen*, Nuremberg 2000

7 See Wordelmann, P.: *Internationalisierung und Netzkompetenz*.

- In: BWP 29 (2000) 6, p. 31 ff.
- 8 See: Bang, K.: *Trinationale Ausbildung bei Endress und Hauser*. In: Wordelmann, P. (ed.): *Internationale Qualifikationen. Inhalte, Bedarf und Vermittlung*, BIBB, Berlin and Bonn 1995, p. 183 ff.
  - 9 See: Borch, H.; Hecker, O.; Weißmann, H.: *IT-Weiterbildung – Lehre mit Karriere. Flexibles Weiterbildungssystem einer Branche macht (hoffentlich) Karriere*. In: BWP 29 (2000) 6, p. 22 ff.



## Qualification for the globalisation process

### The example of Deutsche Bahn AG

► The question of the necessary qualifications for international vocational activity to the forefront no later than with the creation of the single European market. The increasing internationalisation of work demands more mobility on the part of employees - and portends the possibility of spending a large share of one's working life abroad in future. Giving young people and skilled workers the opportunity to acquaint themselves with foreign cultures and ways of working through vocational training programmes is taking on a whole new significance in this light. Initiatives such as the one launched by German Rail (Deutsche Bahn AG), for example, have underscored the relevance of training to the globalisation process.

#### New human resources management challenges emanating from globalisation and internationalisation

The rapidly growing significance of internationalisation and globalisation processes in the economy is forcing more and more enterprises to internationalise their products and services and to assume a global perspective in order to maintain their position in the marketplace. Large internationally-operating enterprises in the processing industry, electrical engineering, mechanical engineering and above all in the automobile industry are leading the way in these globalisation trends. Even small to medium-sized industries are increasingly coming under pressure to set themselves off as "global players" by engaging in certain activities.

In a survey carried out in April 2000 on the development of training and employment, the Cologne Institute for Business Research (Institut der deutschen Wirtschaft Köln - IW) queried approx. 4,000 enterprises on their international activities and the consequences of globalisation and internationalisation for the qualification of skilled workers and trainees (LENSKE/WERNER 2000). Of those enterprises which classified themselves as internationally active, one-third maintained locations abroad (Fig. 1). Almost three-quarters of this target group are involved in international commerce. The fact that this does not stop at the borders of the European Union is shown by the fact that the share of enterprises with business contacts inside the EU (71 percent) is only 6 percentage points higher than those with contacts in other countries (65 percent).

This increasing international orientation is not only bringing about considerable changes in the division of labour at the international and national levels - a development already hinted at today in new forms of in and out-sourcing and the establishment of differentiated networks between producers and suppliers. Even more significantly,



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Figure 1 Foreign locations (as a percentage of enterprises)

Foreign locations	Total foreign	EU	Other foreign
Yes	36,6	31,5	31,9
No	63,2	66,5	64,9
No answer	0,1	2,1	3,2
Total	100,0	100,0	100,0

Source: Lenske/Werner: IW survey on training and employment 2000

these globalisation tendencies harbour new challenges to enterprises and their employees' ability to learn: the importance not only of foreign languages, but of intercultural competencies and a global diffusion of knowledge and know-how at the level of executive personnel - and skilled workers as well - is on the increase.

These new challenges to human resources management posed internationalisation and globalisation - combined with the growing demands being placed on personnel management and strategies of qualification adaptation - have been devoted insufficient attention in the past. Similar to research on internationalisation, in which market and corporate-strategy aspects of globalisation continue to dominate scholarly interest, there is much in the field of practice to indicate that enterprises very carefully plan their market expansion strategies, which is to say their utilisation of technology as well as their financing and production organisation, in the run-up to internationalisation measures, but tend to underestimate the role personnel recruiting and deployment, qualifications and training play in any sustainable internationalisation process (MEIL/DÜLL, p. 8).

Recent studies dealing with questions of international corporate mergers and the ensuing problems besetting human resources and corporate culture (APFELTHALER/REDER/MÜLLER 1999; SCHMIDT/SCHELLER 1999) confirm that problems in the area of human resources and corporate culture tend to mount in the course of corporate mergers. The results of a survey of 84 globally-operating enterprises carried out by ISF in Munich in 1998-99 point in the same direction (MEIL/DÜLL, p. 7 et seq.). Asked about their experience and practices in qualification management in internationalisation strategies, the majority of the enterprises queried admitted to "weaknesses in the provision of information and qualifications which are viewed to be necessary for the introduction of internationalisation measures" (ibid., p. 8).



International trainees at Deutsche Bahn AG

International qualifications	Occupational area			
	Commercial occupations	Ind.-tech. occupations	IT occupations	Total
Occupationally-related foreign language abilities	28,4	20,8	40,3	32,4
International technical knowledge	21,3	15,3	25,3	21,6
Other international knowledge and qualifications	16,7	11,2	18,3	15,9

Source: Lenske/Werner: IW survey on training and employment 2000

Figure 2 Percentage of skilled workers who regularly use "international qualifications" (as a percentage of skilled workers)

Corporate representatives have defined important new human resources management tasks primarily in the sending of executive personnel abroad. Language knowledge and management capacities have been mentioned as the primary obstacles to internationalisation. It is becoming more and more apparent however that a demand by business for internationalisation-oriented qualifications can no longer be found alone at management level, but increasingly requires new human resources management strategies at the skilled worker level as well. Among the decisive competitive factors in future for globally-active enterprises will be resource management directed at a globally-oriented transfer of knowledge and know-how, interculturably-communicable patterns of employee behaviour and the fulfilment of differentiated, internationally-oriented customer wishes. As the aforementioned IW study shows, an ever larger percentage of skilled workers today require international occupational competencies (Fig. 2): a specific percentage of staff must regularly use international qualifications in 37 percent of all internationally-operating enterprises. Leading the list are occupationally-related foreign language abilities: about one-third of the employees require these



skills regularly. This is followed by international technical knowledge (22 percent) and other international knowledge and skills.

Foreign language abilities thus enjoy a high priority. But international technical knowledge and intercultural competencies such as “tolerance and adaptive ability in regard to other cultural values and standards”, “ability to put oneself in another’s place”, “thinking in international, global terms” are also considered to be decisive prerequisites for the expectations posited. An increasing number of enterprises are thus being confronted with the question of how one they can significantly increase globalisation competencies and the mobility of skilled and managerial personnel in future and how this specific internationalisation-oriented qualification demand can be systematically adopted and managed.

foreign language and intercultural competencies abroad in Europe. The participating partner enterprises and educational institutions had for their part the opportunity to receive new ideas and to establish international contacts.

*Clearly increase globalisation  
competencies and mobility - the job  
of in-company educational  
and personnel work*

### **Educational policy initiatives for the promotion of mobility in vocational training**

Research and scholarly interest in questions relating to international personnel management concentrates primarily on deficits in the university training of engineering and management graduates. We often lose sight of what has been developed in the area of the training of skilled workers over the years and what has been put into practice step-by-step since the adoption of the European “Leonardo da Vinci” programme at the end of 1994. Within the framework of this programme, the first phase of which lasted from 1995 to 1999 and which in the second phase was extended in 2000 for a further 7 years (2000-2006), a total of around ECU 760 million has been made available throughout Europe thus far for initiatives promoting the quality of vocational training in the European Member States and contributing to an increase in the performance of the vocational training systems. The fundamental promotional instruments of the Leonardo da Vinci programme include, in addition to cross-border pilot projects, above all exchange and placement measures (at least 30 percent of the budget). Within the framework of these exchange and placement measures - the so-called “mobility projects” - it was possible to bring about vocational educational stays abroad and practical training for young people and vocational training practitioners on a much greater scale than in all the previous individual programmes combined. About 7,000 mobility projects were funded in the period from 1995 to 1999, decentrally awarded in the Member States and furnished with over ECU 150 million. Over 150,000 young people in initial vocational training, young jobholders in continuing vocational training, student employees, trainers etc. were able to participate in mobility measures throughout Europe and expand their technical,

The response to the effects of this programme has been positive. Express praise for the fact that through this programme and in particular through the high rate of participation in mobility projects young people from all over Europe were brought together in training and work and had the opportunity to become acquainted with other cultures and ways of thinking without prejudice has not only come from the side of the European Commission and the national players responsible for the implementation of the programme. The social partners and the participating practitioners from vocational schools, businesses and chambers who participated in mobility measures have also abandoned their initial scepticism and come to see that the measures translate into a gain in know-how both for the participants and for business.

### **Initiatives for the internationalisation of in-company educational and personnel work: the example of German Rail (Deutsche Bahn AG)**

The extent to which companies promote the acquisition of international occupational competence through their own qualification programmes within the framework of their training activity is also of interest. As the IW study shows (Fig. 3), nearly every second firm providing training of the enterprises which stated that they operate internationally offered training measures for the promotion of international occupational competence. International qualifications are promoted most often for commercial and IT trainees - this is indeed the case at more than half of the firms which provide training. Only 40 percent of the industrial-technical trainees benefit from this training of this type, however.



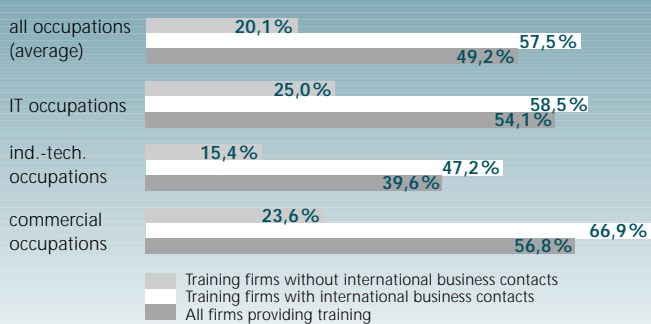
The technique most frequently used by companies is to include trainees in work with foreign partners or customers: this was practised by almost one-third of all internationally-operating enterprises. Ranked second is in-company training of occupationally-related foreign language skills, which is offered to trainees by a good one-quarter of the companies. Practical training/work experience abroad for apprentices is even available at 18 percent of the enterprises. For companies which have international business contacts this figure is 21 percent, for those with locations abroad it is 28 percent.

The way in which these types of training initiatives are organised in practical terms and what value the companies



Federal Education Minister Bulmahn in conversation with trainees from Deutsche Bahn AG

Figure 3 Promotion of international occupational competence through qualification offers by the enterprises



Source: Lenske/Werner: IW survey on training and employment 2000

attach to the opportunity to acquire international occupational competencies will be outlined in the following using the example of Deutsche Bahn AG.

#### (1) MEASURES AND STRATEGIES FOR THE INTERNATIONALISATION OF VOCATIONAL TRAINING

As the largest transport service enterprise in Europe and with around 12,000 trainees in over 30 occupations, Deutsche Bahn began three years ago a major programme to internationalise their in-company educational work. They were reacting in a timely manner to the increased demands by customers on their employees. In doing so, Deutsche Bahn put particular emphasis on early qualification within the framework of the dual system of vocational/educational training.

Today Deutsche Bahn co-operates with railways from France, Denmark, the Netherlands, the Czech Republic, Poland and many other European countries. Transnational training groups with France, Denmark and the Netherlands/Belgium (tri-national groups) have been in existence since 1999. By the end of 2001 more than 150 trainees will

have spent a part of their training in another European country. The main emphasis is on the commercial/service-oriented sector, with a high degree of direct and personal customer care.

#### (2) VOCATIONAL TRAINING

Completely new paths in the transnational training of "Transport service clerks" have been pursued in particular in the co-operation with France. The object of this training is to guarantee the interoperability of future staff in sales and train accompanying service. This calls for a high degree of competence in advising foreign guests at home, including service-readiness, the transnational mobility of staff and knowledge of the products offered by Deutsche Bahn and SNCF.

German and French youth have been trained in joint groups by Deutsche Bahn since 1999. They undergo vocational training, both in-company and at vocational schools, at a number of locations (in particular Karlsruhe, Saarbrücken) on the basis of the Vocational Training Act. Each group is made up of 15 trainees, half French, half German. Practical training in France is provided for the young people from France (in the second year of training) in order to strengthen later transnational deployability. The knowledge conveyed in this work experience is co-ordinated with the in-company training plans and will be documented in future by means of the EUROPASS. The training concludes with a final examination held by the respective Chamber of Industry and Commerce in Germany.

While this is going on, German and French young people are being trained in France in transnational training groups, finishing up their training there with the "bac pro service".

Additional internationalisation strategies in the area of vocational training in co-operation with France are directed at

- Deutsche Bahn and SNCF work experience exchange (lasting one week and integrated as an element of regular vocational training),
- Exchange of industrial-technical trainees with SNCF. One German and one French group of trainees each travel to the other country during their vocational training to help consolidate their transport and technically-specific knowledge as well as their intercultural know-how,
- Exchange of trainers from Deutsche Bahn. These trainers gain experience working with SNCF in France. The goal is to acquire knowledge of structures and the range of products.

In addition, Deutsche Bahn puts emphasis on the acquisition of foreign language skills. All commercial/service-oriented Deutsche Bahn trainees consolidate their knowledge of English through the use of ultra-modern Deutsche Bahn learning programmes in addition to foreign language instruction in the vocational schools. Trainees and staff have the opportunity to expand their vocabulary for customer contact through a self-learning programme. The results have been positive. Through the use of modern instructional forms such as FiF (Fachvokabular im Fremdsprachentraining für den Einsatz in der Qualifizierung von Service- und Verkaufsmitarbeitern - Technical vocabulary in foreign language training for use in the qualification of service and sales staff), passive language skills can be activated and possible inhibitions in using foreign languages can be broken down.

The EU and the Council of Europe have declared 2001 to be the European Year of Languages (EYL). Deutsche Bahn, as a main sponsor of the EYL, is convinced that the learning of foreign languages in the private and occupational spheres is increasingly important for intercultural understanding and mobility within Europe. In this they are co-operating in particular with the National Agency - Education for Europe at the Federal Institute for Vocational Training. The goal of Deutsche Bahn is to extend its previous commitment throughout the group to other sectors within the framework of the EYL.

### (3) CONTINUING AND ADVANCED TRAINING

In addition to the initiatives which have been launched within the framework of classic vocational training, Deutsche Bahn also offers numerous transnational continuing training measures in co-operation with other European countries. These include, among others:

- SIAFI. This is an introductory course in the international rail business and rail co-operation for young management staff. It lasts 10 days, is set up in modules, and is run by the UIC (International Union of Railways, Paris).

- CENTRE. This is an information event for young management staff on the international transport market. It lasts 16 days, taking place at the College of Europe, Brugge, and is organised by the European Training Centre for Railways, ECTR.
- IMPR (in development). DB, SNCF, FS are developing an international management programme for railways under the technical direction of the UIC. The goal is, beginning at the end of 2001, to train future railway management staff with a number of years of experience in a responsible position in strategic topics such as transnational project management and international co-operation in the transport sector (e.g. mergers, joint ventures) in three modules over a period of one year.

In view of the growing significance of transnational co-operation at all levels of the enterprise, this is only the beginning of a far-reaching internationalisation of in-company educational and personnel work. It will increase over the next few years as will the utilisation of media-aided forms of instruction and co-operation.



The president of the Conference of Ministers of Education, Dr. Schavan, is handed the "Service by heart" learning programme of Deutsche Bahn AG

### (4) COMMERCIAL BENEFIT OF TRANSNATIONAL EDUCATIONAL WORK

In the view of Deutsche Bahn, this is only the next logical step in the global orientation of the enterprise. The prerequisites for a continuous exchange of information, experience and knowledge are created through the establishment and expansion of a permanent co-operation network with foreign partners in the industry. The opportunity to gain new experience, to operate globally and to participate in the innovative know-how of others is judged to be an important step in the improvement of the market position of the company.

The possible benefit of a far-reaching internationalisation of in-company personnel and educational work involves a variety of components:

- International projects can support personnel transfer and personnel recruitment from international enterprises to one's own company. This is true in particular for specialists, skilled personnel and management staff;
- People taking part in exchange measures bring new knowledge into the company which can be passed on to other employees;



European trainees at the Deutsche Bahn AG at the opening of the European Year of Languages

- Stays abroad represent a tried and tested means for businesses to examine the ability of their staff to take stress and the potential for development of employees. They can provide information to what extent younger staff and management staff are able to adapt quickly and flexibly to new conditions, to learn in a largely self-managed way, to include consideration of other corporate cultures in their actions, to improvise and to produce results under pressure. Conclusions can be drawn on their further in-company usability;
- The company can improve its image with its staff in the educational area through attractive international educational programmes;
- For skilled and management personnel, but also for capable school-leavers, opportunities for work abroad are more and more often becoming a criterion in deciding for or against a company. International educational programmes help increase the competitive position of the company on the labour market in the search for appropriate staff.

- The industry-specific knowledge and abilities acquired abroad expand the technical, managerial and social competencies of employees. This also includes the expansion of foreign language skills and intercultural competencies, for example with a view to heading international teams;
- Involvement in international mobility measures increases in-company occupational mobility and improves employment chances on the German and European labour markets;

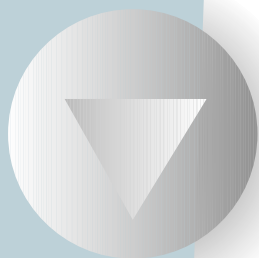
## Outlook

There is every reason to believe that the demands for a more global orientation on the part of German enterprises will increase in the coming years. Increased qualification output by the enterprises as well as a high degree of self-initiative and mobility-readiness by staff will thus be required in order to establish and expand those occupational competencies which can be used in an international context. The urgency of qualification in the globalisation process is thus turning into a challenge for vocational training and continuing training in Germany to develop a stronger international orientation. Measures such as those successfully undertaken by Deutsche Bahn AG can have very much of a model character for the future qualification strategies of globally-operating enterprises. Future activities should thus be concentrated on the rapid dissemination of these models and their adaptation for small and medium-sized enterprises. ■

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- Stays abroad increase independent action and the self-learning competence of staff;
- Participation in international projects leads to greater motivation on the part of staff and increases identification with their own company;
- Participants in international projects can reflect on and examine their own in-company activity against an expanded background, possible company blinders can be eliminated or avoided;



## The “Memorandum on Lifelong Learning”<sup>1</sup> in the context of European educational co-operation

► The discussion about lifelong learning is not new. Lifelong learning has been a topic in policy speeches for years. The European Union declared 1996 the “Year of Lifelong Learning”. Lifelong learning is a topic of discussion at major educational policy bodies and discussion forums such as the Federal Government-Länder Commission, the Conference of Ministers of Education (KMK), the Education Forum and the Alliance for Jobs.

The European Commission presented a “Memorandum on Lifelong Learning on 31 October 2000”<sup>2</sup> The basis of the Memorandum was a resolution issued by the Council of Ministers (Education) in March 2000 in Feira, Portugal. The Conclusion of the Council asks “Member States, the Council and the Commission ... within their domains of competence, to identify coherent strategies and practical measures with a view to fostering lifelong learning for all.”<sup>3</sup>

### Key messages of the “Memorandum on Lifelong Learning”

On the one hand, “lifelong learning” is indispensable for active citizenship. The complexity of European societies has clearly increased. Social participation presupposes an increasingly higher level of knowledge and skills. This level can only be permanently updated through lifelong learning. On the other hand, “lifelong learning” is an important prerequisite for the employability of the individual, full employment and ultimately the competitiveness of the European economy.<sup>4</sup>

In the opinion of the Commission there is a broad consensus within the European Union on the importance of lifelong learning. However this has not yet been translated into effective action, despite a variety of resolutions.<sup>5</sup> The initiative associated with the memorandum is meant to take precisely this lack as its point of departure.

The “Memorandum on Lifelong Learning” contains six “key messages”<sup>6</sup>:

#### 1. New basic skills for everyone

The Memorandum defines 5 basic skills which every citizen should have in future in order (to be able) “to participate in the knowledge-based society and economy”: IT skills, foreign languages, technological culture, entrepreneurship



**KLAUS FAHLE**

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and social skills. These basic skills go back to the conclusions of the Lisbon European Council. They enable citizens to “actively participate in working life, family life and all levels of community life – from local to European”<sup>7</sup>.

## *2. Raising the level of investment in human resources*

Per capita investment in human resources should be significantly increased in future. The spectrum of measures extends from collective agreements to taxation laws. The term investment is understood in an economic sense and does not refer exclusively to state expenditure. The objective is to develop individual incentive systems, arrangements for co-financing of lifelong learning and to use of instruments of structural policy to improve the infrastructure.

## *3. Innovation in teaching and learning: developing effective teaching and learning methods*

This term addresses not only technological innovations – it focuses in particular on the adaptation of methods of teaching and learning to a changed social context. The buzzwords here are the changed relationship between initial vocational training and continuing training as well as the changed role of educational personnel in educational processes. Altered learning arrangements are meant to better take into account the specifics of certain target groups. The capability for self-managed learning is to be more strongly supported as well.

## *4. Recognition/appreciation of formal and informal qualifications*

The demand for relevant qualifications is expanding in view of increasing competition on the labour market and growing technical demands. Of particular importance are the certification of informal learning and mutual recognition in Europe. The goal is to create transparency for those learning and for employers as regards a (European) labour market.

## *5. Rethinking guidance and counselling*

Information and advice should be a service accessible to everyone at any time, holistically oriented towards the needs and requirements of the user. It should include advice on lifelong learning opportunities in the whole of Europe. Vocational guidance should follow a holistic approach and be better networked with other guidance services.

## *6. Bridging physical distances through the use of new technologies*

The goal is to bring learning opportunities closer to the learner and to utilise ICT-based technologies as required. Learning takes place primarily in local circumstances. This is to be taken into account through the creation of learning centres in those places which can reach the most people.

Indicators should be developed which are directly related to the six messages of the Memorandum to support this process.

## **Lisbon European Council<sup>8</sup>: New overall conditions for European educational co-operation**

The significance of the Memorandum of the EU Commission only becomes clear against the background of the dynamic development of European educational co-operation. The resolutions of the Lisbon Council represent an important stage.

The instrument of the European action programmes in European educational co-operation was first introduced in the 80s and 90s and later systematised and refined. The Leonardo da Vinci and Socrates programmes are important instruments promoting innovation, mobility and the exchange of experience among the actors of the educational systems. They function primarily according to the bottom-up approach: the underlying Council resolutions define general areas of co-operation. The concrete structuring and realisation takes place within the framework of projects proposed by schools, colleges, businesses, etc. The European Council of Education Ministers also dealt with specific educational policy subjects which found expression in resolutions and orders within the framework of a particular presidency. Such resolutions as a rule represented a minimum consensus and remained largely without consequences.

Since then European educational co-operation has changed fundamentally:

- In the area of employment policy (so-called Luxembourg process) the Member States agreed employment policy guidelines in which for the first time concrete, employment objectives subject to review were defined at the level of the EU.<sup>9</sup> This action programme also forced the ministers of education to take action, since an effective employment policy cannot be realised without educational or vocational training policy measures.
- The ministers of education intensified their co-operation and launched a so-called “rolling agenda”.<sup>10</sup> This tool has ensured for the first time continuous work on central topics even under the conditions of a changing Council presidency.
- The ministers of education will in future base their co-operation on the “open co-ordination” method. In the view of the EU Commission, this method leads in the long run to the setting out of guidelines for the Union which are combined with specific time frames for the realisation of short, medium and long-term goals:



- the initiatives eEurope and eLearning<sup>14</sup> which affect educational policy to a considerable degree;
- the “Memorandum on Lifelong Learning”.

In addition, the European Council agreed in Nice on the Mobility Action Plan, which places far-reaching demands on the Member States, not only affecting the sphere of responsibility of the Ministers of Education.<sup>15</sup>

While in the past policy statements from the EU Commission were not as a rule followed up with any activities, this has changed recently. The EU Commission has presented an action programme<sup>16</sup> within the framework of the eLearning initiative which pursues far-reaching political objectives and which provides for co-ordination of the eLearning activities in various programmes. In contrast to the EU action programmes, the action plan bundles -existing EU activities and programmes (ESF, education and research programmes, EIB activities) and political co-ordination.

The “Memorandum on Lifelong Learning” has the same point of departure as the announcement of the European Commission on eLearning from the year 2000: after the conclusion of consultation, a European action plan of the European Commission is to be presented in 2001. The Member States are also called upon to draw up national action plans. In view of the dynamics of European educational co-operation, it can be assumed that these action plans will have a substantial effect on the educational policy of the Member States.

## Assessment of the key messages of the Memorandum<sup>17</sup>

One can certainly not apply the same standards to the Memorandum as to a national strategy paper. The current situations of the Member States of the European Union, the states in the European economic zone and the future accession states vary too much. From a professional point of view, the following remarks appear to be warranted:

The Memorandum does not supply any substantially new suggestions for the realisation of the “lifelong learning” concept. The most important messages in the Memorandum have been the object of educational policy discussions for quite some time and a subject of European discussion since the European Year of Lifelong Learning in 1996 at the latest. The Memorandum does, however, deserve credit for having systematised the discussion. In the German view, it is the statements on certification, the recognition of informal learning as well as the funding of lifelong learning which are of importance.

- “The development of suitable quantitative and qualitative indicators and benchmarks which reflect the highest international standards and which are tailored to the requirements of the various Member States and sectors and provide an instrument for the comparison of best practices;
- Transfer of these European guidelines into national and regional strategies through the establishing of specific goals while taking appropriate measures with proper consideration for national and regional differences;
- Regular monitoring, evaluation and peer reviews which are organised in such a way that everyone can learn from each other.<sup>11</sup>
- The Lisbon Council 2000 looked into questions of educational policy at Council level in a fundamental way for the first time. The ministers of education were called upon to present a comprehensive report in spring 2001 and to generally consider the concrete future objectives of the educational systems and concentrate on general concerns and priorities (...)”<sup>12</sup>.
- The report of the ministers of education presented at the Stockholm Council 2001 includes a work program orientated towards programmatic objectives, in which activities in connection with the realisation of the concept of lifelong learning play a central role. It mentions for the first time the possibility of “measuring” the notified objectives, identifying areas for peer review as well as determining indicators for the achievement of goals.<sup>13</sup>

Since 1998-99 a significant educational policy action level has developed beyond the EU action programmes. The participating actors are determined to be capable of acting at European level, to agree objectives and if required to realise these through effective measures. Previously taboo instruments such as the development of indicators, benchmarking or peer review are finding increasingly acceptance.

The European Commission for its part used these constellations in three fundamental educational policy initiatives. These include

- declaring with the Council of Europe the year 2001 to be the “European Year of Languages”;

- Certificates have a considerable importance on the German labour market. Beyond school education, initial vocational training and third-level education, however, there is a lack of structures and systems in order to be able to classify certificates. In this respect, it would be very desirable if a comprehensive system of certification were to be created. Directly related to this is the issue of recognition for informal learning. Learning processes are integrated in work processes to a high degree, and learning in the workplace as well as competency development

*Statements on certification and funding of lifelong learning and on the recognition of informal learning are of particular importance*

in work processes take part to a large extent in informal learning processes. In Germany no practice has crystallised thus far for the certification of this form of continuing vocational training.<sup>18</sup> All previous efforts to achieve comprehensive mutual recognition of vocational qualifications have been for the most part unsuccessful. Third-level degrees and qualifications for the so-called regulated occupations represent exceptions worth mentioning. The introduction of the Vocational Training Europass does represent a system for written confirmation of skills acquired abroad, but this written confirmation is limited to a very small area and does not represent recognition in a legal sense.

- Demands for increased investment in human resources are to be welcomed. There has yet to be an analysis of the deficit sectors of public educational funding. Missing as well are statements on management tools to be able to effectively utilise additional funds.

The Memorandum remains too superficial and simplistic on other important issues. It is not always clear whether this is due to the European character of the Memorandum or the lack of analytical examination.

- The Memorandum is to a great extent fixated on gainfully employed or at least potentially gainfully employed persons. Significant statements in the six key messages can only be discerned in the context of an employment relationship or they relate to future employ-

ability. This is the case for example with regard to the statements made on the deficits of certification systems and individual learning accounts.

- The statements made on “disadvantaged” groups in our society are overly simplistic. The bandwidth of disadvantage is immense: people can be excluded from social participation on the basis of their social status, their age, their gender, the region in which they live, etc. An additional factor (“digital divide”) is added by the dynamic development of information and communications technologies: approaches to a solution should be as discriminating as the causes of a disadvantage. Unfortunately no such impetus emanates from the Memorandum.
- The aspect of quality assurance within the framework of lifelong learning, which plays an important role in the current discussion in Germany, receives little attention.
- The relationship between initial vocational training and lifelong learning must be identified as a central theme. Well-grounded initial vocational training must remain the basis for lifelong vocational training in future as well. Lifelong learning must not lead to the elimination of the concept of the regulated occupation.

## Outlook

Over the past two years, a jolt has gone through European educational co-operation – largely unnoticed by the public. Education ministers and the EU Commission use terms which were taboo just a few years ago. Fundamental questions of future educational policy development are being intensively discussed, above all at Council level. The steps to a common European employment policy have also contributed to this. The Lisbon Council was of decisive importance, however. The ministers of education now find themselves in a higher political context.<sup>19</sup> This development is to be welcomed. The future of EU Europe is not to be shaped without more intensively addressing issues in the areas of education and training.

The Leonardo da Vinci and Socrates EU programmes will continue to play an important role in European educational policy. The discussion has not yet found expression in the practice of the programmes. It is to be assumed, however, that the latent removal of the programmes from the political discussion which can be witnessed at present will not last for long since these programmes do represent the main implementation instruments of the General Directorate for Education and Culture of the European Commission.

Elements of educational policy co-ordination which do not stop at the boundaries of traditional departmental responsibilities in the Member States are developing in tandem

with the action programmes. The political co-ordination tool is not one of the original instruments of the European Union. Up to now the EU has relied on the tool of legislation in the first instance. Since the mid-90s, however, political co-ordination has taken place in a series of political areas such as economic and financial policy, asylum policy and employment policy.<sup>20</sup> Co-ordination, benchmarking and the development of indicators are leading to increased competitive pressure among the Member States. Comparison puts an end to cosiness. National educational policy faces a new challenge if the most recently passed resolutions are not to remain mere lip-service.

The "Memorandum on Lifelong Learning" is, after the eLearning initiative, the second major educational policy project of the EU to take place under the modified conditions of "open co-ordination". The Memorandum raises a number of fundamental questions. A truly broad public discussion is still at its very beginnings. Many contributions to this debate will fall short of making concrete provisions or drawing consequences for the European level at first. But the spirit which has been conjured up cannot be put back into the bottle. ■

## BIBB's research results



### Arbeitsprogramm 2001

The Federal Institute for Vocational Training (BIBB) programme for 2001 provides a comprehensive overview of the organisations' activities. The publication begins with a presentation of research projects grouped according to the BIBB's three research concentrations. This is followed by descriptions of internationally commissioned research projects as well as projects with external, third-party funding. The programme concludes with a description of projects in progress. The BIBB Standing Committee authorised the 2001 programme in its published form at its 14-15 March 2001 meeting.

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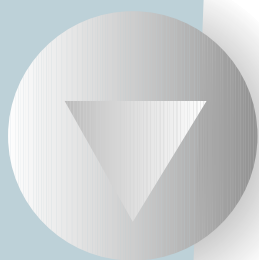
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**BIBB**

### Notes

- 1 In the following the term "lifelong learning", generally accepted in the EU, is used even though the German term "lebensbegleitendes Lernen" (learning which accompanies one throughout life) more aptly describes the subject under discussion.
- 2 Commission of the European Communities: Memorandum on Lifelong Learning, SEC (2000) 1832 of 31.10.2000, also available as download from [europa.eu.int/comm/education/life/index.html](http://europa.eu.int/comm/education/life/index.html)
- 3 Conclusion of the Feira Council, Section 33
- 4 Memorandum, p. 6
- 5 *ibid.* p. 7
- 6 *ibid.* pp. 12-23
- 7 *ibid.* p. 12
- 8 The term European Council refers to the summits by heads of state and government of the Member States of the EU. Government minister councils are subordinate to the European Council.
- 9 Council Order of 19 January 2001 on Guidelines for Employment Policy Measures of the Member States in 2001, Official Gazette L 22 of 24.1.2001
- 10 Council Resolution of 17 December 1999 "On the development of new ways of working for European co-operation in the area of general and vocational education", Official Gazette C 8 of 17.12.1999
- 11 Speech by EU Commissioner Viviane Reding on 7.3.2001 in Bonn, [www.na-bibb.de/aktuelles](http://www.na-bibb.de/aktuelles)
- 12 European Council 23-24.3.2000 Lisbon, Conclusion of the Presidency, Section 27
- 13 Council of the European Union, Report of the Council (Education) to the European Council "The concrete future objectives of the systems of general and vocational education", Brussels 2001
- 14 Commission of the European Communities, eLearning: Designing tomorrow's education, COM (2000) 318 final of 24.5.2000
- 15 Resolution of the Council and the representatives of the Member States united in the Council of 14.12.2000 on the stipulation of an action plan for the promotion of mobility, Official Gazette C 371/4 of 23.12.2000
- 16 Commission of the European Communities, eLearning Action Plan. Designing tomorrow's education, COM (2001) 172 final of 28.3.2001
- 17 A detailed discussion of the statements of the Memorandum is contained in the reaction of the BIBB, [www.bibb.de](http://www.bibb.de)
- 18 Heimann, K.: Betriebspolitik braucht aktive Kompetenzentwicklung. In: Gewerkschaftliche Bildungspolitik 1/2 2001, pp. 14-24, here p. 16
- 19 Why this has come about now cannot be analysed in detail at this point. There is certainly an interplay between political constellations in important Member States which places issues relating to economic, employment and social policy on the European political agenda and links them with globalisation processes.
- 20 Fears that the European Commission would expand its competence beyond the treaty framework are unfounded in this regard. The co-ordination of political fields for the most part stems from the Member States and is of an inter-governmental nature in part. The Commission has no exclusive right of initiative, in contrast to the legislative process.



## Initiatives for the training, qualification and employment of young people – a German-French comparison

► In October 2000 a working group of experts from the Federal Institute for Vocational Training and administration and research experts from France met in Bonn in order to compare programmes for the reduction of youth unemployment in the two countries and to identify particularly successful and innovative approaches in these programmes for their mutual benefit. The basis for this meeting was provided by the “Joint declaration on initiatives for the training, qualification and employment of young people” adopted within the framework of the 74th German-French Summit on 30 November 1999 in Paris.



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### The task

In their joint declaration, the ministers in charge of education, Edelgard Bulmahn and Claude Allègre, emphasised that “both countries attach the highest priority to combating unemployment among youth”. The national programmes which have been developed for this purpose are meant “to provide young people with vocational training, in particular young people with start-up difficulties, and to open up employment opportunities for these young people”. The proposed extension in co-operation between the two countries serves, according to the declaration, “to promote the goal of gaining new knowledge and experience for the respective national initiatives and developing opportunities for joint activities”.

### The current situation: youth unemployment in Germany and France

The working group of experts from the two countries<sup>1</sup> first compared the situation for young people on the employment and training places market in Germany and France and discussed specific features of the two vocational training systems. For example, it was found that special characteristics need to be taken into account in comparing the unemployment rates of Germany and France: In the Federal Republic, young people who are registered with an employment office as applicants for in-company training places are not included in the unemployment statistics. In addition, around 1.7 million young people who are undergoing vocational training in the dual system of vocational/educational training are counted as gainfully employed. In France, on the other hand, the majority of the comparable age cohort is involved in a school-based education or training system.

Since unemployment rates are usually calculated on the basis of gainfully employed persons, the rates for Germany are lower than those for France. In reference to these rates, unemployment rose for the 15 to 24 age group in the 90s,

reaching its highest point in 1997. In the following years the rate declined slightly in both countries (see table). In order to obtain comparable data on the current situation, the working group agreed that rates which put the number of unemployed young people in relation to the totality of young people in the affected age group offer a better insight into the situation of youth on the labour market in the two countries. 1999 was chosen as the reference year for the comparison of the programmes. Comparable starting positions for both countries resulted from this method of computation: in 1999 the percentage of unemployed young people between 15 and 24 was 7.5 percent in France and 4.7 percent in Germany.<sup>2</sup>

### The programmes in Germany

In Germany many statutory funding programmes of the federal government and the Länder support the transition from school to the world of work and the phase of vocational training. These also include a number of state-financed fixed-term programmes for combating youth unemployment. Programmes with regular funding exist for aiding young people with start-up difficulties. The German-French working group examined the “Immediate programme for the reduction of youth unemployment - training, qualification and employment of young people” and the Federal Employment Service’s “Support for the disadvantaged” programme, both in accordance with the performance targets set out in the joint declaration of 30 November 1999.

#### IMMEDIATE PROGRAMME

The Immediate Programme adopted at the end of 1998 was first limited to one year and was extended in 2000 and 2001. Two thousand million German marks were made available annually. Around 176,000 young people took part in the various schemes in 1999.<sup>3</sup> The experts found two innovative approaches in schemes supporting young people, above all in Articles 2 and 11 of the Immediate Programme:

*In local and regional projects* (Article 2) various activities for the increase and full utilisation of the in-company offer of training places are carried out:

- development of new local training initiatives and expansion of existing initiatives;
- winning over proprietors of foreign origin, new business start-ups and new technology-intensive industries, particularly in the area of information and telecommunications technology, to provide vocational training (i.e. in local training initiatives);

Unemployment rates for 15-24 year olds in percent

	Germany	France
1990	5,6	19,1
1996	9,3	26,3
1997	10,2	28,1
1998	9,1	25,4
1999	8,5	26,6

Source: Perspectives de l’emploi de l’OCDE, June 2000

- improving the placement of girls and young women in future and technology-oriented occupations where women are under-represented, and
- creating additional in-company training places for disadvantaged and foreign young people.

268 projects were funded and 9,028 additional in-company training places were created in 1999. The disproportionately large increase in the number of new training places in the course of the year in comparison to the number of projects funded reveals a favourable cost-benefit relationship in the development of the projects. Since the projects sometimes last up to three years, further significant contributions to increasing the in-company supply of training places can be expected in the coming years.<sup>4</sup>

Youth and young adults who cannot be helped by integration schemes on account of personal difficulties or because they no longer accept this offer of help are motivated to engage in vocational training, prepare for an occupation or seek employment by means of follow-up social work/

#### Within the framework of the Immediate Programme

- local and regional projects for the full utilisation and increase of in-company training offers are funded (Article 2),
- training programmes for training place applicants who did not yet find a training place (Article 3, now rescinded) are carried out,
- unplaced training place applicants are offered the first year of training in a recognised regulated occupation in an extra-company vocational training facility (Article 4),
- young people are given the opportunity to make up a secondary modern school or comparable school qualification (Article 5),
- young people not yet suited for vocational training are prepared for taking up vocational training (Work and Training, Article 6)
- young people who have not completed their vocational qualification are trained to provide them a certain vocational qualification level and unemployed young people are given additional qualifications as well as offered training measures (Article 7),
- wage subsidies for the hiring of unemployed youth are granted (Article 8),
- long-term unemployed are given certifiable partial qualifications within the framework of qualification and job-creating programmes (Article 9),
- aid in the transition from training to employment is granted (Article 10) and particularly disadvantaged youth receive social care in order to ease their integration into the training and employment system (Article 11).



youth vocational welfare (Article 11). Organisations which take on these tasks receive funding. A total of 21,652 young people were approached and provided social care. The measure is suitable for (re-) integrating particularly disadvantaged young people into the employment system and preventing their permanent social exclusion.<sup>5</sup>

## Combating youth unemployment has priority

### SUPPORT FOR THE DISADVANTAGED

The support for the disadvantaged provided by the Federal Employment Service (in accordance with Social Code III) is directed at young people up to 27 years of age who are considered to be learning-impaired or socially disadvantaged (behavioural problems, drug dependencies or delinquency), at young foreign people with integration problems and at young adults who have no (vocational) qualifications. The Federal Employment Service pursues three support objectives:

- The young people are prepared in vocational schools for the commencement of vocational training in the standard dual system of vocational/educational training. The measures are directed at different target groups and last between two and twelve months. About 100,000 young people take part in vocational preparation annually. For the experts of the bi-national working group, it was important that young people who are tired of school and learning can be addressed in this way in order to make up their school qualifications or begin vocational training.
- "Training to supplement aid" (ausbildungsbegleitende Hilfe (abH)) is offered on the one hand in the form of supportive instruction and social care (1999: 71,000 participants) to support young people on the way to a successful vocational qualification. On the other hand there is the possibility of obtaining vocational training in an extra-company facility (Berufsausbildung in einer außerbetrieblichen Einrichtung (BaE)), during which the young people also receive supportive instruction and social care (1999: 33,000 young people). In both cases individual support plans are drawn up. The working group identified one positive aspect in the fact that the organisations responsible for these measures co-operate with local companies and that because of this closeness to the economy there was a greater chance for a transfer to gainful employment.
- In addition, aid is offered for integration in the primary labour market during the job search period and the initial phase of employment (transitional aid). For example, the "Work and Qualification" measure allows young people to make up a Hauptschule (lower secondary

school) qualification during regular (fixed-term) employment or to complete a vocational training qualification. The participants' individual psycho-social problems can be addressed through social care. The working group saw the advantage of these measures in the fact that they allowed young people with poor school prerequisites to pursue a vocational qualification during gainful employment.

### Employment and training policy in France

Since the 80s, France has utilised a series of instruments for the better integration of young people. These include three broad categories of measures:

- dual training courses
- measures to support employment in the non-commercial sector
- vocational training instruments, which have been in the hands of the regional councils (conseils régionaux) since 1993.

By the end of 1999 nearly one million young people had made use of one of these public offers for training or integration, and 39 percent of employed young people had a state-subsidised job.

In accordance with the targets of the 74th German-French Summit, the working group evaluated the programmes "TRACE" (TRajectoire d'Accès à l'Emploi) and "Nouveaux services-emplois jeunes/NS-EJ" ("New Services - Employment Programme for Youth").

### THE "NS-EJ" PROGRAMME

Under the 16 October 1997 Act pursuant to the Development of Activities for the Employment of Young People, "socially beneficial activities" were to be created in order to allow a total of 350,000 young people to receive vocational experience. Young people are offered jobs in the service sector which are created in various fields of activity on the basis of a regional needs analysis. Local authorities, state institutions, private charitable institutions as well as the state educational system and the national police are considered as possible employers. This employment is open to unemployed young people under 26 years of age (in certain cases under 30 years of age). The objective is to include 20 percent of the young people from urban problem zones in the programme. The state aid is granted in the form of a subsidy for the newly created services and corresponds to 80 percent of the minimum wage in France (SMIC). The employment contracts (which are governed by private law) are concluded either for an unspecified period or for 60 months. One of the prime objectives of the "NS-EJ" programme is the "professionalisation" of young people. For this purpose a "professionalisation platform"

has been set up in every region, which is meant to set up and structure qualification and training standards for these new employment opportunities on the basis of analyses of regional needs.

The working group sees the exceptional quality of the programme to lie in its ability to pursue new paths for the vocational qualification of young people within the framework of the new services created by the programme. It is important that the acquired skills and vocational experience are certified so that they are recognised on the job market.

#### THE "TRACE" PROGRAMME

This programme, which was introduced with the 29 July 1998 Act Combating Social Exclusion, is directed at the permanent vocational integration of a total of 110,000 young people between 18 and 26 years of age who have left the school system without a vocational qualification. The programme is meant to lead to permanent employment for at least half of the young people. The main feature of this programme is to have a single person provide 18 months of regular, personal care for these young people to help integrate them socially and vocationally. Various measures are combined: the young people are introduced to the vocational situation through in-company practical experience, fixed-term contracts or the assumption of tasks on a substitute basis or they receive the basic knowledge of a vocational qualification. Through this programme, which had already benefited 75,000 young people by the end of 1999, it was possible to intensify the contact between the young people and the care structures and expand the care on offer (accommodation, training, health, training, job, etc.).

The working group particularly emphasised the long-term relationship and controlled care between the young people and their contact person in this programme. The personal relationship is based on a contractual agreement by the young person with his or her contact person on the basis of a jointly devised integration project. A coherent chronological process with phases of social re-integration and pre-qualification or vocational qualification comes into being, very probably leading to a secure job. In the case of integration problems, a relief fund offers temporary financial support.

#### Impulses/possibilities for transfer

After the youth unemployment programmes were evaluated and especially successful and innovative measures were identified, the working group examined - as prescribed by the 74th German-French Summit - whether mutual benefits could be derived from the respective experiences. The goal was to identify where there was an impetus

to be found for the individual national programmes and potential possibilities for transfer.

Correspondingly, the French side picked out the following German measures which could supply stimulation for the future structuring of French programmes:

1. Local and regional projects for the full utilisation and increase of in-company training places on offer which are initiated and promoted within the framework of the Immediate Programme.
2. Vocational preparation and training accompanying aid which is offered within the framework of the support for the disadvantaged by the Federal Employment Service.
3. A good practice centre for support of the disadvantaged, as is currently being established at the Federal Institute for Vocational Training.

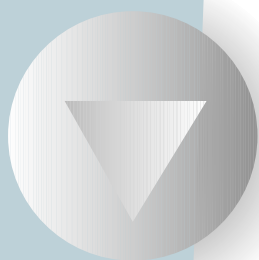
The German side received new ideas and found opportunities for the structuring of German programmes and measures to be found especially in the following components of the French programmes:

1. Intensive and continuous care for disadvantaged young people over a period of 18 months such as is provided by TRACE.
2. Employment-accompanying qualifications within the framework of NS-EJ, which provide young people with vocational experience and are meant to contribute to the development of new occupational fields. In Germany new qualification opportunities could arise above all for disadvantaged young people in accordance with this French example.
3. Care being provided for young people by young carers who are unemployed and are newly hired for this service task. In accordance with the French example (-TRACE), above all disadvantaged young people could be socially cared for in Germany in this way, at the same time reducing unemployment among youth.

The working group set out the results of the Bonn meeting in a joint paper which was passed on to responsible offices at the policy level through a bi-national commission. ■

#### Notes

- 1 *Members of the working group on the French side: Didier Gélot (DARES), Christiane Jouan (DIIJ), Bernard Simonin (CEE); members on the German side (BIBB): Thomas Bausch, Michael Friedrich, Hans-Joachim Kissling, Dr. Friedel Schier; co-ordination: Oliver Stumpf (Office II of the Plenipotentiary of the Federal Republic of Germany for Cultural Affairs)*
- 2 *Source: Federal Employment Service, Annual Average; Federal Statistics Office*
- 3 *Data: Dietrich, H.: IAB Werkstattbericht, No. 3, 26/02/2001*  
*See also: Friedrich, M.; Troeltsch, K.; Westhoff, G.: Das Sofortprogramm zur Bekämpfung der Jugendarbeitslosigkeit zeigt Wirkung. Erste Ergebnisse aus der Begleitforschung des BIBB. In: BWP 28 (1999) 6, pp. 5-10*
- 4 *The number of training places mobilised within the framework of projects was able to be increased to 14,245 from 1999 by the end of December 2000.*
- 5 *According to a survey by the Institute for Employment Research (IAB), 11% of young people who were cared for by social workers and educators in 1999 and 2000 ended up in in-company vocational training, 19% had begun gainful employment, 22% had begun another measure and 31% were unemployed. In: Dietrich, H.: IAB Werkstattbericht, No. 3, 26/02/2001*



## What is to follow TRANSFORM?

### Success in the effort to promote the transformation of vocational training in Central and Eastern Europe

► In September 1992, the Federal Ministry of Education and Research gave the BIBB the job of implementing, supporting and evaluating measures in the area of vocational training in the countries of central and eastern Europe within the framework of the Federal Government's advisory programme, TRANSFORM. This article reports on BIBB's experience with the project, which is now in its final phase, and traces prospects for further co-operation. In particular, a pilot project is presented which seeks to find ways for future BIBB advisory services to profit from the TRANSFORM experience.

#### Starting position and most urgent tasks

Vocational training in central and eastern Europe at the beginning of the 90s was predominately school-based (theoretical instruction sometimes supplemented by school-based workshops) and suffered from a total lack of social esteem. At the same time, however, there were efforts to bring vocational training closer to business and the economy, to create new statutory frameworks, to rekindle vocational training research and above all to develop national registers of regulated occupations or to fundamentally revise available standards and redelineate occupations. The advisory services of the BIBB were able to tie into these efforts. A holistic approach was taken: instead of isolated individual actions, the various projects and measures were placed in a systemic context to help stabilise initial reforms. Additional goals were: to increase the orientation towards the needs of the partner country, to the field of practice, to ensure that projects were of a long-term nature and flexible as well as focus on results and attempt to make results of the work have a sustainable impact.

The elimination of centralisation, the abolition of one-sided ideological values, the end of the state monopoly on education in general and the vocational training system in particular often came about over a very brief period of time. The completion of other more fundamental tasks such as orienting vocational training more closely to the needs of the free market economy, reinvigorating the tried and tested traditions of training in the craft trades, which had been dormant for decades, teaching those vocational qualifications which help create a linkage between advanced technologies and new forms of labour organisation in the western world and encouraging greater dependence on level and skills profiles in important western role-model countries required a longer period of time.



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In the instruction office set up with TRANSFORM funds at Kiev Vocational Pedagogical College, trainees create brochures for their hypothetical company, which even carries out foreign trade within the framework of the European practice company ring, European.

## Objectives and main areas emphasis

The vocational training consulting activities of the BIBB were directed towards supporting the development of *action and practice-oriented forms of vocational training and continuing training* and new vocational skills profiles. Enterprises, chambers and associations participated - sometimes for the first time in the history of a particular country - in the design and structuring of vocational training by acting increasingly to influence the mapping of medium and long-term qualifications requirements (skills profiles) in their industries. A contribution was made in this way to an intensification of the permanent dialogue between the economy and the vocational training system along their reform path. Also taken into account was the fact that in future trade unions in central and eastern Europe are to be assigned a stronger role as an equal social partner in vocational training.

An impetus to establish small and medium-sized enterprise structures was found to emanate, for example, from the fact that graduates of vocational training and further training (or retraining) courses were provided qualifications specifically aiding them in their efforts to start up small new enterprises or craft businesses and become employers themselves.

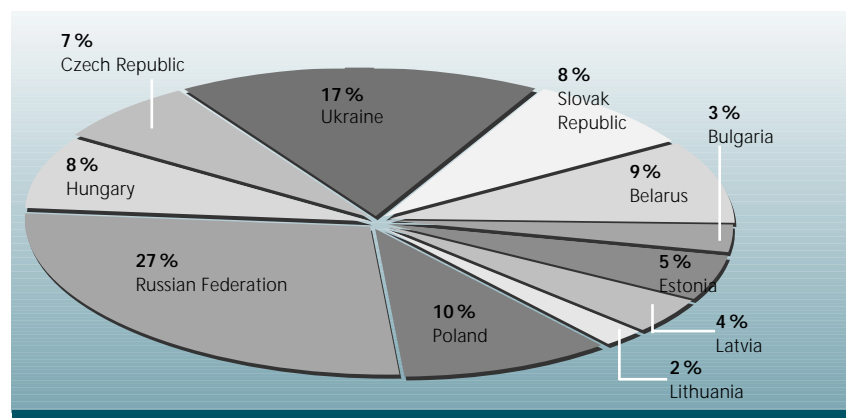
As regards the sectors of the economy involved, the main emphasis was on projects for the development or modernisation of commercial-administrative occupations as well as projects in the industrial-technical sector and in crafts and trades, where at the same time an attempt was made to integrate modern and environmentally-friendly technology into vocational training. In addition, a series of trans-sectoral tasks were performed (technical advice on systems development, support in the establishment of vocational training institutes, support in drawing up or revising lists of national occupational classifications/registers of regulated occupations). The German consulting aid was to a

large degree needs-oriented, responding to the demand for specific topics as articulated by the partner countries.

In addition to content-based priorities and sectoral emphases, the department responsible for the co-ordination of the TRANSFORM programme (initially the Federal Ministry of Economics and Technology, then the Federal Ministry for Economic Co-operation and Development) determined regional priorities ("priority regions") for some large countries such as Russia, Poland and Ukraine. These were also the regions where vocational training projects were located. The preconditions for a broad transfer of results were also created by establishing cross-border co-operation networks. In addition to the East-West co-operation, it was also possible to provide an impetus for the (re-)involvement of co-operation between the individual states of eastern Europe and for the utilisation of synergy effects, which was of great significance in light of the limited funds available.

Similarly, synergy effects were used through networking with activities of the Carl Duisberg Gesellschaft (CDG), the Foundation for Economic Development and Vocational Training (SEQUA), Handwerker und Handwerkerinnen am Europäischen Haus, gtz, consulting firms, foundations, etc. In addition, the BIBB was able to co-operate and exchange information with those international and supranational institutions likewise committed to supporting vocational training reforms in central and eastern Europe, above all with the European Training Foundation (ETF), Turin, and with CEDEFOP, UNEVOC, and to some extent with vocational training institutes in the EU states as well. In this way powerful networks have been established and are available for similar tasks in future.

Those institutions in the partner countries which are responsible at the macro-level for vocational training were integrated in the co-operation scheme from the very be-



Share of the individual central and eastern European states in the total funding volume for these countries under the programmes lasting from 1993 to 2001



ginning: the ministries of education and the vocational training institutes which exist in most of the countries of central and eastern Europe. The main focus for the work were set out and the model vocational training projects designed in tandem with these institutions. They selected the facilities where the projects would be located and prepared



The presentation of the SPS model laboratory established with TRANSFORM funds in Belarus to numerous representatives of the economy and the press is exciting ...

the work. They also ensured the integration of enterprises as practical partners. The ministries and Institutes supported the model projects with research and co-ordinated project networks involving the institutions. With their support a country-wide dissemination of project results was aimed for and in many cases, especially in the smaller countries, also achieved. In a number of projects it was even possible to disseminate the results beyond the state borders and to create transnational networks.

Eleven countries were aided in the funding programme from 1993 to 2000 with a total of around DM 44.2 million: Belarus, Bulgaria, Estonia, Latvia, Lithuania, Poland, Russian Federation, Slovak Republic, Czech Republic, Hungary, Ukraine. A major portion of the funding – which was always provided in close consultation with the Federal Ministry of Education and Research – went to the Russian Federation, the Ukraine and Poland.

## Experience gained

The co-operation scheme was an exciting learning experience for everyone involved. The most important lesson to be learned is that, in contrast to expectations at the outset, the process of transforming vocational training is a lengthy one. The co-operation scheme is expected to have a time frame encompassing several years, particularly with regard to the specialised systems for consulting and the execution of model projects. In this connection, a large increase in intercultural competence, that is to say becoming

acquainted with specific socio-cultural forms of behaviour, thinking and decision-making of experts in central and eastern Europe was repeatedly emphasised as a very important addition to the knowledge of the German participants.

The Germans in charge of project implementation encountered vocational training systems previously almost unknown to them and found competent partners in the countries of central and eastern Europe. The German side obtained information on how schools and enterprises co-operate and solve problems in vocational training in eastern Europe. This comparison made it possible to look at vocational training in Germany from a different angle as well. Besides the effects of the programme on vocational training co-operation, the TRANSFORM projects also provided an impetus for economic co-operation and helped German firms establish themselves in central and eastern European markets. Eastern European partners became acquainted with products and services offered by the German economy, which will boost German exports.



... but successful (director of the Belarus vocational training institute RIPO, Prof. A. Shkilyar), in the background: colleagues from Lomza, Poland, from which the SPS modules were transferred to Belarus.

Personal contacts, which are of far greater importance in the central and eastern European countries than in the west, continue to exist between the German project partners and the model projects. The mutual trust and common experience of the past few years will be a great advantage in future co-operation, in which all the partner states have expressed an interest.

At an early point in the co-operation within the framework of TRANSFORM, the Federal Institute concluded co-operation agreements with vocational training institutes in central and eastern European countries with the IRPO (Russia), the RIPO (Belarus), the SIOV (Slovakia), the VUOS, now the NUOV (Czech Republic), and the NIVE (Hungary) in order to put co-operation efforts on an even more





secure basis. These agreements are currently being reviewed and revised. This should help guide future co-operation with our eastern European partner institutions and expand on what are already good relationships.

## Prospects for the continuation of co-operation

The results of the TRANSFORM projects have been comprehensively documented.<sup>1</sup> An interesting field for future co-operation with all countries which wish to introduce stronger elements of dual vocational/educational training in their vocational training systems has been opened up through this material, as have possibilities for future research, for example in the areas of transformation and transfer research.

In order to make the experience of the TRANSFORM projects available for future BIBB consulting work, a research project entitled "Further development of tools in vocational training consulting abroad on the basis of a sustainability analysis of TRANSFORM projects" was launched in 2001. Evaluations of individual TRANSFORM projects which had previously been carried out focused on the procedures and tools used, the project design and organisation and, wherever possible, the (partial) results and were carried out along with the projects. Sustainability was measured in terms of whether there was any prospect for the innovations emanating from the project to be continued on a long-term basis without external aid.

The latest research views sustainability to be a very complex phenomenon which includes planned and unplanned effects, and which may or may not stand in conformity with the objectives of the project. These effects manifest themselves primarily in the post-funding phase, but are based on the foundation of the tangible and intangible structures created during the funding period<sup>2</sup>, an analytic framework developed in evaluation research forms serves as the basis in the research project for determining the sustainable effects of the TRANSFORM projects in this comprehensive sense.<sup>3</sup> This framework had previously only been tested on projects in developing countries and was now adapted to requirements in evaluating the TRANSFORM projects with reference to the expertise of external partners (staff of the Russian "sister" institute of the BIBB, the IRPO). After the long-term goals which were attained

were comprehensively documented on the basis of this framework, the changes since the termination of funding were evaluated and the effects emanating from the projects in each case were analysed, these effects were studied in terms of their causal relationship with the project development and planning. A final workshop with evaluation research specialists is planned to lend objectivity to the analysis. Here the results will be assessed and possible cause-effect relationships identified. The "project profiles", that is to say the summaries of the evaluation results at a very high level of abstraction, created in the evaluation of consulting projects in developing countries are a comparative standard for the profiles of the TRANSFORM projects. If the consulting measures carried out are similar and if the same or very similar results are noted in spite of the special characteristics which are typical of transformation

*Research project makes  
experience from TRANSFORM projects  
available for future  
BIBB consulting services*

countries, then it can be assumed with a high level of probability that the effects of BIBB's consulting in eastern Europe stand in a causal relationship to the project measures. This allows recommendations to be made for future vocational training consulting. Should clearly different results arise for similar consulting measures, then analogously designed evaluations for additional TRANSFORM projects will be required in order to clarify the causal relationships.

This research project, the first of its kind at BIBB, is a pilot project in a number of ways. Not only is it the first summary evaluation of a TRANSFORM project in a long time.<sup>4</sup> For the first time BIBB is testing an evaluative approach which has already received broad recognition in German-language research and practice (BMZ, gtz), but which has not yet been used in a transformation country. In addition, a research project of the BIBB is also being carried out in close co-operation with a foreign vocational training institute for the first time.

There are already a variety of subjects which have been suggested for further measures of co-operation with the states of central and eastern Europe. These include, for example, joint work on the *development of tools to guarantee*

*the sustainability of vocational training measures*: statistics, vocational training reports and methods of early recognition of qualification demand. In this area, the observatories of the ETF (European Training Foundation, Turin) are especially active in the successor states of the former Soviet Union. It would also be possible to set up an international exchange of information on issues relating to the funding of vocational training. The practical realisation of innovative funding concepts can also be observed and studied in this context. Particularly in the successor states of the former Soviet Union, the schools are often forced to finance themselves through the sale of workpieces by the trainees themselves as a result of the notoriously tight educational budgets.

Interest has been expressed in *elaborating new occupational profiles for training* and continuing training in cooperation with the BIBB

- by partners in the countries of central and eastern Europe and the successor states of the former Soviet Union in cross-border innovative projects in the training sector (currently: mechatronics fitter, integration of cross-border restructuring of occupations in the transport indus-

try, in future also of occupations in the hotel and restaurant industry - in the latter area preliminary project work has already taken place: Poland, Russia, the Ukraine - and others)

- especially by the EU accession countries in the development of "Europe-oriented" advanced training occupations which link in to existing nationally-regulated occupations (examples: European welding engineer, "European secretary")
- by all the TRANSFORM partner countries in the area of the introduction or modernisation of advanced training as a follow-up to the training of skilled workers, for example master craftsperson qualifications<sup>5</sup>, with experience already having been gained in some projects within the framework of the TRANSFORM programme.

Closely connected with this is the revision of performance assessment (examination forms/assessment), the examination system and certification under discussion in a number of countries of central and eastern Europe.

The experience of TRANSFORM could possibly be used in new consulting projects currently being developed, for example in South Africa, Vietnam and Brazil. ■

#### Notes

1 Literature published by BIBB within the framework of the TRANSFORM programme includes:

- Jahresprogramme TRANSFORM - Berufsbildung in Mittel- und Osteuropa. Aufgaben, Maßnahmen und Projekte im TRANSFORM-Programm. Frequency of publication: annually, 1994-1999
- TRANSFORM information service "Informationen zur Aus- und Weiterbildung in Mittel- und Osteuropa", 1993-1997 with a subject focus in each issue

- Numerous individual publications, e.g. Hoene, B.: Unterstützung der Transformation beruflicher Bildung in Mittel und Osteuropa - Erfahrungen des BIBB aus dem TRANSFORM-Programm. In: BWP 29 (2000) 3, pp. 35-40

2 Compare for example the multidimensional sustainability concept in: Stockmann, R.: Die Wirksamkeit der Entwicklungshilfe. Opladen 1996

3 Analytic frameworks modified for the respective study conditions are for example documented in the following sources:

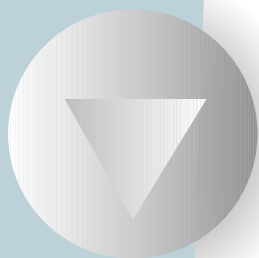
- Analyseraster zur Erhebung der Nachhaltigkeit von Ent-

wicklungsprojekten. In: Stockmann, R.: Die Wirksamkeit der Entwicklungshilfe. Opladen 1996

- Analyseraster: Leitfaden für die Prüfung, Planung und Fortschrittskontrolle von Berufsbildungsprojekten. In: Stockmann, R.; Kohlmann, U.: Transferierbarkeit des dualen Systems - Eine Evaluation dualer Ausbildungsprojekte in Entwicklungsländern. Diskussionsbeiträge und Materialien zur internationalen Berufsbildungszusammenarbeit, Volume 13, ed.: GTZ GmbH, Eschborn. Berlin 1998

4 Laur-Ernst, U.: Kooperative Evaluation der Zusammenarbeit. In: Gemeinsame Präsentation von Ergebnissen der deutsch-russischen Zusammenarbeit auf dem Gebiet der beruflichen Bildung, Moscow 20-22 November 1994. Federal Institute for Vocational Training. The General Secretary (ed.) Berlin/Bonn: December 1995/January 1996

5 See also the following article by Andrea Zimmermann on training of craftspersons in Russia, which is to be supplemented with mastercraftsperson courses this year.



## Skilled trade promotion through vocational training in Russia

### A model project changes the Moscow training system

► In Russia, the extensive lack of small and medium-sized skilled trade enterprises makes the development of free enterprise structures more difficult. One of the main impediments to the formation of a broad base of skilled trade entrepreneurs is the lack of qualifications on the part of technical specialists. This is the point of departure for the model project, "Skilled trade promotion through vocational training in Russia", initiated by the Düsseldorf Chamber of Small Industries and Skilled Trades in 1994. The project, which was funded within the framework of the TRANSFORM advisory programme of the Federal Institute for Vocational Training, was brought to a close last year after registering remarkable success.

In contrast to most of the reform states of eastern and central Europe, where even under socialism there was a semblance of free small-scale industrial and skilled trade activity, supplying important links in the formation of free enterprise structures at the beginning of the nineties, small Russian industries and skilled trades were victims of Soviet ideology. They were so thoroughly eradicated that skilled trade enterprises no longer existed as economic actors - either in real terms or in the public consciousness. The only exception was the narrow sector of the arts and crafts industry where, however, artistic elements tended to predominate over skilled trade-commercial elements. When it was not used as a synonym for arts and crafts, *Remeslo* - the Russian term for craft/trade - was used in an entirely negative manner, and connoted unskilled work, backward forms of production or even "botched" work. The social prestige of a craft or trade was correspondingly located at the lowest end of the scale - to be called a "remeslennik", a tradesman or woman, was an insult.

Russia urgently needed to galvanise small and medium-sized entrepreneurs in order to accelerate the transformation process and establish free enterprise structures. The economic, social and psychological preconditions were extremely unfavourable, however, particularly in the sector of production, so important because of its high rate of wealth creation.<sup>1</sup>

### Comprehensive structural promotion concept

In order to make an effective contribution to entrepreneurial development in Russia, the Düsseldorf Chamber of Small Industries and Skilled Trades (HWK) developed a comprehensive promotion concept based on a *model development of self-help structures having two analogous areas of impact*:



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Impressions from the practical instruction of carpenters at Vocational Lyceum No. 331 in Moscow

(1) Enterprise promotion through the development of inter-company structures in the form of a Moscow Chamber of Small Industries and Skilled Trades and (2) promotion of the up-and-coming generation through the setting up of a school for skilled tradesmen and women. It is of elemental importance for the project conception, project implementation, project results as well as the emerging further developments, that both promotional segments be considered as mutually fruitful and stimulating *parts of a total concept*.<sup>2</sup>

## Problems of the vocational training system

The problem with regard to skilled trades training in Russia is not, as the Russian partners initially believed, primarily a problem of antiquated training workshops or a lack of training tools and materials. The actual problem of *skilled trades training in Russia* lies deeper, namely in the Russian vocational training system itself, which was doubly influenced by ideological considerations. On the one hand the system viewed skilled trades training as low-level vocational training which did not even aim for a high level of technical qualification.<sup>3</sup> Classical skilled trades – such as hairdresser, for example – in which a qualified training took place, were consequently not understood as skilled trades but rather categorised as service occupations. On the other hand, the (also ideologically-based) one-sided orientation of the Russian educational system towards industrial requirements and the hyper-specialisation associated therewith left no room for skilled trades training. Training was carried out in industry not skilled trades, thus passing over the requirements of incipient skilled trades enterprises in the early nineties.

## Adaptive approach

Against this background, it was of primary importance to convey to the Russian partners a notion of skilled trades, skilled trades activity and skilled trades training, in order to develop joint objectives while taking into account special Russian conditions in step two. An ad hoc transfer of the dual system of vocational/educational training was not intended any more than a simple transfer of German training ordinances. It was much more a case of developing model occupational profiles which (1) were oriented towards the needs of Russian skilled trades enterprises, (2) could be practically tested and integrated within the existing vocational training system, but which (3) opened up opportunities to loosen up the primarily school-based form of vocational training and open it up to the newly-developing skilled trades enterprises to pave the way for the development of dual structures.

## Working together co-operatively

A completely new path in the area of skilled trades vocational training in Moscow was taken with this approach. The crucial factor determining the success of the project was the ability to make the project objectives and project design comprehensible to the Russian partners and to integrate them as equal partners in all phases of the project (planning, preparation, implementation and aftercare). The higher the degree of understanding, acceptance and identification, the easier it is to overcome resistance, the higher the motivation and the greater the chances of sustainability – that was the underlying philosophy.

## Content design

Selecting the occupations planned for the vocational training work stood at the forefront of initial work designing the content matter. Since the booming market sector of apartment and building renovation would offer a field of work to graduates in the foreseeable future in Moscow, and the personnel, spatial and equipment resources at the facility planned for the project work, PTU 47, allowed a concentration on the finishing and completion sector, a decision was made to select the occupations of Carpenter, Tile and Mosaic Layer, Painter/Designer and Stucco Plasterer/Restorer<sup>4</sup>. In order to raise the training level in these occupations to a higher level and to fence them off from the low qualification standard of the one-sidedly industry-oriented, practice-remote and overly theoretical PTUs, a new school-based model, the “Vocational Lyceum for Skilled Tradesmen and Tradeswomen”<sup>5</sup>, was developed on





Award of master craftsman's/woman's certificates by the President of the Moscow Chamber of Small Industries and Skilled Trades, Mr Rusaykin, to the new master craftsmen and master craftsmen of the Vocational Lyceum. From left to right: Ms Gorskaya, master plasterer, Ms Frolova, master painter, Mr Rusaykin, President of the Moscow Chamber of Small Industries and Skilled Trades, Ms Shirova, master tile layer; in foreground: Mr Ivanov, master carpenter at the Vocational Lyceum No. 331 in Moscow

the basis of the Russian legislation "On Education" of 1992 and the project school, PTU 47, was transformed into the Vocational Lyceum for Skilled Tradesmen and Tradeswomen No. 331.<sup>6</sup>

As a result of this new legal form, the pupils of the Vocational Lyceum are able to obtain the qualification of a Russian lower secondary school and a vocational qualification commensurate with the western European level. As a "Centre of Lifelong Learning" - the full name of Vocational Lyceum No. 331 - the school also has the job of developing and implementing advanced and continuing training offers for skilled tradesmen and tradeswomen. And finally, as a model facility of the Moscow Education Committee, the school has the job of organising advanced and continuing training measures for the school headmasters, teachers and master craftsmen/women of other Moscow educational establishments. The integration of the Moscow Chamber of Small Industries and Skilled Trades, whose say in questions of training affecting them was anchored in the statutes of the Vocational Lyceum, was also fundamentally new. The integration achieved in this way served the desired increased feedback between vocational training and training requirements from the enterprises. A two-stage modular system was developed for training in the four model occupations leading in the first stage to a skilled tradesman or tradeswoman qualification after three years of training. The qualification of master craftsman/craftswomen or skilled trades enterprise manager can be obtained after completing a fourth course lasting one year. Since the transfer of the dual system of vocational/educational training was not viewed to be a realistic option, the focus was on introducing *dual principles*. All the measures concentrated on strengthening technical practice, which was to be structured bear as close a relation to enterprises as possible.<sup>7</sup> In particular this meant<sup>8</sup>:

- reduction of general education subjects to a minimum
- increase of the number of hours planned for practical technical instruction
- reduction of group size to a max. of 15 pupils (as opposed to the earlier 30)
- co-ordination between technical theoretical content matter and the practical technical requirements and co-operation between teachers and master craftsmen and crafts-women of the respective vocational training courses
- realistic workshop organisation
- introduction of in-company practical training
- orientation of instruction on the education of independent, responsible individuals
- introduction of practical examination work (earlier: completion of diploma work even in practical technical examination section)
- co-operation of teachers, master craftsmen and crafts-women and the Moscow Chamber of Small Industries and Skilled Trades in the planning and implementation of examinations.

## First positive response

In September 1995 the starting shot was fired for vocational training. One year later, teachers and master craftsmen and craftswomen drew up the first interim balance<sup>9</sup>, revealing that

- they judged their work in general to be more interesting;
- they had noticed a clear increase in motivation both among themselves and among pupils, which found expression in a changed attitude towards work and significantly better performance on the part of the pupils<sup>10</sup>;
- they noticed a positive change in attitude among the pupils towards skilled trades and a strong identification with the Vocational Lyceum;
- correspondingly - in contrast to the past - no pupil dropped out of the first year of vocational training.

Two years later, the first 59 qualified tradeswomen and tradesmen were able to receive their state diplomas and their certificates of qualification as tradesmen or tradeswomen from the President of the Moscow Chamber of Small Industries and Skilled Trades. By 2000, a total of 221 young people had successfully completed their training at Vocational Lyceum No. 331 with a final apprenticeship ex-

	1998	1999	2000
Painter/Designer	14	11	20
Tile/Mosaic Layer	19	22	22
Carpenter	26	28	29
Stucco plasterer/Restorer	-	15	15



amination. The distribution in the individual occupations is shown in the following illustration:

The Vocational Lyceum not only became better known through pupils' word-of-mouth, "open house" days, vocational information conferences for directors of Moscow secondary schools, specific information and media work by the Vocational Lyceum and the Moscow Education Committee. The expectation that the Lyceum would serve as a model in Moscow and beyond also began to come to fruition. The government of the Sverdlovsk district decided in March 1997 to take over the model within the framework of its own project in Yekaterinburg.<sup>11</sup>

## Legal foundations

The project received a qualitatively new dimension in June 1999 when the "*Law on skilled trades in Moscow*" was passed by the Moscow Duma.

For the area of vocational training, the key elements to the first skilled trades law since the October Revolution, which is strongly based on the German experience, are:

- the first statutory regulation of skilled trades vocational training in general;
- the full recognition of the enterprise-supported form of vocational training as an alternative to what used to be exclusively state-recognised school-based form of skilled trades vocational training in vocational lyceums and thus the establishment of *legal foundations for dual structures in vocational training*;
- the introduction of final apprenticeship and master craftsman/craftswoman examinations;
- the involvement of the legally recognised Moscow Chamber of Small Industries and Skilled Trades in final apprenticeship and master craftsman/craftswoman examinations.

The individual legal provisions relating to this affect the results achieved within the framework of the project very positively:

- The organisational pattern and the "secondary educational level" which can be attained at the "Vocational Lyceum for Skilled Tradesmen and Tradeswomen" developed as a model have received a legal footing.
- The project school thus has thus become an organisational model for the school-based form of training of craftsmen and craftswomen for all of Moscow. (The law calls for the Moscow Education Committee to set up additional skilled trades vocational educational establishments according to this model.)
- The final apprenticeship examinations which have been carried out at the Vocational Lyceum since 1998 serve as an orientation point for relevant examinations at fu-

ture vocational lyceums for skilled tradesmen/women.

- The interest of the Moscow Education Committee in the master/entrepreneur course developed within the framework of the project has increased considerably. Efforts are now being made to create a distinctive image as a forerunner and centre of competence with the implementation of this course and, for the first time, master craftsman/woman examinations to be held at a Vocational Lyceum for Skilled Tradesmen/women.



Planning talk between the German and Russian project co-ordinators, Tiedemann (left in picture) and Dr Semitschastnov, Moscow Education Committee (right in picture). In the centre of the picture is the scientific advisor, Dr Kosmodemyanskaya.

With the enactment of the Moscow Skilled Trades Act, the model character of the project was provided legal footing while the sustainability of the project results were guaranteed in a manner which could not have been predicted at the start of the project.

## Results

Overall, the results of the six years of German-Russian co-operation in the area of skilled trades vocational training are considerable:

- A model school for skilled trades vocational training was founded in the form of Vocational Lyceum No. 331, which actually does justice to its function.
- The model character of Vocational Lyceum No. 331 was provided a legal foundation through the enactment of the Moscow Skilled Trades Act.
- Under a resolution passed by the Moscow city government in January 2001, the Moscow Education Committee has been given the task of naming additional vocational educational establishments for realisation of the model.
- In this way, the project has created the foundation for new structures for skilled trades vocational training.
- Vocational standards were developed and practically tested with such great success in the occupations of

Painter/Designer, Tile and Mosaic Layer, Stucco Plasterer/Restorer and Carpenter that the demand is clearly outstripping the number of vacant training places.

- A total of 221 young people have successfully completed their training in a skilled trade with the final apprenticeship examination since 1998.
- Vocational training manuals have been drawn up for all four occupations.
- These manuals will be, insofar as this has not already taken place, distributed by the Moscow Education Committee in the form of textbooks.<sup>12</sup>
- Master craftsmen/women and teachers from Moscow vocational schools will be trained at the Vocational Lyceum.
- A "Continuing Training in Skilled Trades Cabinet" will be set up at the project office.
- The adoption of the project results is not limited to Moscow - the project is already being imitated in other regions of the Russian Federation, as in Yekaterinburg.

*Moscow has thus taken on a model function for all of Russia in the area of skilled trades and skilled trades vocational training.* In this, the comprehensive skilled trades promotion concept of the Düsseldorf Chamber of Small Industries and Skilled Trades has played a decisive role. Because without the Moscow Chamber of Small Industries and Skilled Trades and the representation of interests function supported so effectively by the Chamber, there would have been no Moscow Skilled Trades Act and thus no legal recognition of the skilled tradesman/woman school as a model school of skilled trades vocational training for Moscow, and without the skilled tradesman/woman school no

statutory revision of skilled trades vocational training. The remarkable success of the project is to a considerable degree the result of synergies.

## Outlook

Under the resolution passed by the Moscow city government in January 2001, the implementing regulations for the Skilled Trades Act were adopted, thus launching a new phase in the development of skilled trades in Moscow. At the same time, concrete steps were taken for transfer in the Moscow region. The mayor of the city of Moscow, Mr Lushkov, suggested to the governor of the Moscow region, Mr Gromov, in spring 2001 that a skilled trades act be drafted for the Moscow region as well and that the area of activity of the Moscow Chamber of Small Industries and Skilled Trades be extended to include the Moscow region. With this, the model function of Moscow for the further development of skilled trades in Russia is taking on concrete form for the first time.

The project has in the meantime gone over to Russian self-sponsorship. The wish for advisory support continues, however. A totally new path of vocational training is being taken in Russia with the numerous statutory regulations, involving for example in-company training and final apprenticeship and master craftsman/woman examinations. A new demand for care and advice has arisen in these areas, which is ultimately the result of the unexpectedly comprehensive success of the project work. ■

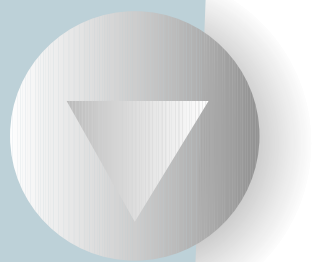
## Notes

- 1 On the development policy importance of small enterprises, in particular in the production sector see Köster, Th.: *Wohlstand durch unternehmerische Eigenverantwortung - Handwerk als Promotor der Entwicklungspolitik am Beispiel Russlands*. In: Pinger, W. (ed.): *Armutsbekämpfung. Herausforderung für die deutsche Entwicklungspolitik, Unkel/ Rhein; Bad Honnef 1998*, pp. 131-143; *ibid.*: *Die Rolle des Handwerks in der Marktwirtschaft. Die deutsche Erfahrung*. In: *Handwerkskammer Düsseldorf* (ed.): *Russland-Projekte. Abschlussdokumentation. Ergebnisse der Projektarbeit 1992-2000, Tipps und Erfahrungen aus der Projektarbeit mit Russland*, No. 2/2000, October 2000 (bilingual), pp. 7-13
- 2 Project conception and development in various phases have been extensively described and

- documented. See: *Handwerkskammer Düsseldorf* (ed.): *Wohlstand durch Eigenverantwortung. Kleine und mittlere Unternehmen als Rückgrat der Wirtschaft in Moskau*. Information/Dokumentation No. 1/96 (reprint of 3/93 edition); Köster, Th.: *Wohlstand durch unternehmerische Eigenverantwortung*. op.cit.; *Handwerkskammer Düsseldorf* (ed.): *Russland-Projekte. Abschlussdokumentation: Russland-Projekte. Dokumentation. Projektabschlusskonferenz der Handwerkskammer Düsseldorf am 26. Oktober 2000 in Moskau, Tipps und Erfahrungen aus der Projektarbeit mit Russland*, No. 1/2001, May 2001
- 3 See Tiedemann, B.: *Wandel durch Ausbildung*. Unpublished manuscript of speech at international seminar of the Eberhard Schöck Foundation, 24-25 April 1998 in Bonn

- 4 The two latter occupations received their names in order to distinguish them from the occupations "Building painter" and "Plasterer", to which low social prestige is attached in Russia.
- 5 Since successful graduates of class 9 of lower secondary schools were determined as the target group, the model of the college was ruled out.
- 6 See Tiedemann, B.: *Berufsllyzeum für Handwerker Nr. 331. Werkstattberichte 2/1995* (unpublished documentation)
- 7 Far-reaching changes were associated with this for the teachers and master craftsmen/ women, which are however judged to be very positive. See *Stimmen zum Modellprojekt. Meinungen, Erfahrungen, Bewertungen*. Unpublished documentation, Düsseldorf/Moscow 1996; *Selections in: Abschlussdokumentation*. op.cit., p. 82 ff.; 107 f.

- 8 See also Tiedemann, B.: *Wandel durch Annäherung*. op.cit. p. 5
- 9 See *Stimmen zum Modellprojekt*, op.cit.,
- 10 Master painter Frolova reported that at a vocational information conference run by the Vocational Lyceum, one of the school directors present "discovered one of her worst pupils studying with me and was astounded to hear that he caused no problems here and was doing good work". *ibid.*, p. 56
- 11 The Eberhard Schöck Foundation took upon itself the task of implementing and promoting this project.
- 12 Currently volumes 1 and 2 of the textbook of vocational training in tile and mosaic laying are available. The textbook on vocational training in the painting and design trade is in preparation.



## Vocational training and virtual learning in development co-operation

MANFRED WALLENBORN

► Electronic media have been utilised to varying degrees internationally. The developing countries have the greatest infrastructural deficits and lack the needed specialists. This article looks at the question of how vocational training co-operation with developing countries can promote the use of electronic media for educational purposes. The modest use of the Internet in the developing countries is nothing new, and this phase-shifted, non-intensive use does not differ from the implementation of other technologies in the systems of the south.

Like other technologies, the information and communications technologies (ITC) are also used in various system configurations in the developing countries and find their dissemination and status in the context of these systems. Therefore the "return" from the use of such technologies is never proportionate to the technologies themselves. Rather, it is for the most part a function of the existing "societal average" of their areas of application and design. In particular, communications services providers, operating internationally almost exclusively in the form of private enterprises, will continue to weigh out investments in infrastructure and the acquisition of respective operating

licenses in terms of the profits this will generate. It is this frequent lack of economic incentive that makes development co-operation projects in the ITC sector especially important.

### Where chances does ICT have in the area of vocational training?

Vocational training has always played an important role in German development co-operation. This has been mainly due to its outstanding relevance to economic and social development and the model character which co-operative (training and) education models have for partner countries. The possible transfer of these system configurations to the local level dominated the agenda of development co-operation for a long time. Today a greater scepticism can be detected as a result of the incipient development of a systems theory (LUHMANN 1993 and 1997).

Development towards a global society presupposes proper participatory conditions for the respective actors in often trans-nationally structured production, transport and communications inter-relationships. Proper conditions not only imply infrastructurally-safeguarded communications opportunities - it is also necessary for these actors to understand what is going on in the respective fields of action. This is not particularly easy in the knowledge society; qualification prerequisites were recently picked out as a central topic in an edition of "Berufsbildung in Wissenschaft und Praxis" (BIBB 2000): persons and organisations constantly need to process more information in order to stay connected to complex stocks of knowledge. This does not result automatically in more insight which is then translated into action and knowledge, since individuals are dealing with larger data sets - a principle which plays a special role in the interculturally-oriented teaching methods of international measures for human resources development.

Information must be available independent of time and place, and it must be managed: it must be available in system-relevant form - that is to say based on the system's own code (WILLKE 1998). This also applies to the training measures offered by educational systems in the developing world. There too the relevant curricula and other organisational knowledge must be adapted to conform to new developments. The Internet offers a variety of opportunities to enable institutions in partner countries to keep pace with these developments. Typical areas of north-south co-operation are:

- information and data transfer regarding (technological, vocational educational and teaching methodological) innovations which have come about within the context of the educational processes in the north and which can be adapted to conditions in the developing world,

- personnel training as a prerequisite for the Internet-supported updating of such projects.

### Previous activities and preliminary work

The Federal Ministry for Economic Co-operation and Development (BMZ) has charged the German Foundation for International Development (DSE) with the training and advanced professional training of skilled and executive personnel from developing countries and the transformation countries of Central and Eastern Europe. The Industrial Occupations Promotion Centre (ZGB) of the DSE is tackling this assignment in the area of vocational training: it has developed educational offers which take into account in a holistic manner the requirements of the various functional levels of the vocational training systems. This also includes the development of a virtual learning platform, Global Campus 21 (see box p. 35). Through this co-operation with vocational training systems in the partner countries, this platform primarily aims at carrying out the following tasks:

- Processing information which had been previously unavailable and making it available at no cost or at low cost to the experts of the south.
- Preparing and assessing Net-supported further training programmes. In this way, programmes on offer can be optimised or their sustainability guaranteed in the run-up phase. This allows measures to be tailored to better conform to demand and needs and to shorten the time frame involved in further training on site.
- Picking out the Internet as a (meta) theme in (partly) virtual learning offers and, as a result, promoting the implementation of Net-supported training offers. In this way the platform is given an instrumental function: it empowers domestic experts to design appropriate (partly) virtual educational offers and to close existing and expanding gaps in knowledge by taking advantage of opportunities to communicate with specialised institutions in the north independently of space and time.

Institutional transformation in the developing world is being supported by the Global Campus 21 platform, which is aimed at creating the training prerequisites for dealing with the New Media for the benefit of partners. The ZGB is therefore stressing the use of the Internet in vocational training in a pilot programme (in a virtual phase and during an event on site). The programme is directed at experts from Asia who already work with the Internet or will be developing Net-supported educational programmes in future. Countries such as India, China or Indonesia have great hopes with regard to the many advantages offered by virtual programmes on account of the immense distances and/or poor transport opportunities in these coun-

tries. They are however not completely clear about the educational-didactic constraints on these programmes, which often only have a supportive function. This is where important consulting work can be performed, drawing on experience which has been systematised and evaluated.

The programmes on offer at the Industrial Occupations Promotion Centre of the DSE also look closely at learning styles and strategies (WALLENBORN and WIECKENBERG 2000) as well as the economic advantages and disadvantages of (partly) virtual measures for educational policy. The issue of funding individual programmes must be given even greater attention in the educational measures in future programmes, with the same applying to the reduced didactic possibilities for virtual strategies in the developing countries (due to conditions there, in particular problems with load times and bandwidths). Only this will help bring about more efficient strategies in this area.

### Future perspectives

The reality of Net-use in vocational training processes in the developing world will continue to develop along differentiated lines at a rapid pace. The BMZ (2000) is already speaking of so-called late-comers, that is to say countries in which both communications networks and the infrastructure in the hardware and software sectors do not allow unlimited or only allow relatively rudimentary access to the Net, while threshold countries like Brazil, Argentina, Thailand, India, etc., are apparently rapidly creating the right preconditions for the use of the Internet in learning processes in their educational systems. The ZGB must therefore design its Net-supported educational offers in accordance with a strategic perspective which takes into account the material prerequisites and personal qualifications of the locals: multipliers must be specifically integrated into the relevant programmes, reproducing the available knowledge stocks even without a broadly-effective opportunity for the use of the Net. Poten-

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#### Global Campus 21

Global Campus 21 is a knowledge portal for international advanced vocational training and follow-up on the Internet. Specialists and executive personnel from all over the world have access in the "open" area of Global Campus 21 to important information and publications from the area of advanced vocational training in many specialised areas. In addition, there is a platform for communication, exchange of knowledge and co-operation with colleagues and experts from all over the world. The name Global Campus 21 is derived from "world-wide learning" and AGENDA 21, the implementation process adopted as an action guideline for sustainable development at the global conference in Rio de Janeiro in 1992. The promotion of sustainable development in this sense is also the goal of the further training programmes which the Carl Duisberg Gesellschaft (CDG) and the German Foundation for International Development (DSE), the providers of Global Campus 21, offer for specialists and executive personnel in many subject areas.



tial fields of action for activities are therefore seen by the ZGB to lie in a country and regionally-specific mixture of

- Net-supported dissemination of information, in which data is made available which is relevant within the partner organisations (e.g. teaching texts). This results in opportunities for co-operation, which have only been utilised in a sub-optimum way up to now. This can function in the south even with quantitatively limited access to the Net since information moved in this way can also be further disseminated in the usual ways in the developing countries and the organisations located there,

*The virtuality of educational events will also enhance learning arrangements in on-site events*

- Net-supported (partly) virtual educational offers, which can be more accurately directed towards experts at specific functional levels with concrete programmes and identifiable learning objectives. Initial programme experience has already been gained here which provides encouragement for continuing the path already begun.

The Net-supported educational offers will, however, not replace social learning in international human resource development programmes having multi-cultural further training groups, which the ZGB designs and implements in its fields of activity for experts in vocational training systems. As paradoxical as it may seem: virtuality will also enhance learning arrangements in on-site events. Technology must therefore continue to be used where this appears to be feasible. This in turn depends on social interrelations in the partner countries. Euphoria is not warranted in certain countries and regions. ■

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## The European Year of Languages 2001 - "As linguas abrem portas"

ULRIKE SCHRÖDER

► 2001 has been declared the European Year of Languages (EYL) by the European Union and the Council of Europe in order to emphasise the importance of language learning in Europe.

Europe is growing together and this is having an increasing impact on each and every individual: political and economic relations have become closer and more frequent, new opportunities for vocational and private mobility are changing life and career paths.

It should be no surprise, then, that knowledge of foreign languages is becoming ever more important. Knowledge of foreign languages not only has personal advantages - it also contributes to the development of tolerance and understanding. Beyond communication, knowledge of the language of a country or a region opens up a deeper insight into a particular culture and facilitates an understanding of the thinking and behaviour of others.

With the slogan "Languages open doors", the European Year of Languages is aimed at:

- increasing awareness of the linguistic and cultural diversity of Europe,
- emphasising the vocational, private and political advantages of language skills,
- making language learning accessible to all,
- above all, providing motivation for learning languages.

The emphasis is not on such already widespread languages as English. Particular attention is being given to the smaller and less commonly taught languages as well as regional and minority languages. Around 8 million euros are being made available by the European Commission in order to carry out a Europe-wide information and advertising campaign as well as to fund a host of regional events and projects in the Member States.

National co-ordination offices for the EYL have been set up in the Member States to provide support to the European Commission and the Council of Europe. In Germany, the Federal Ministry of Education and Research (BMBF), responsible at a political level for the European Year of Languages, has charged the National Agency - Education for Europe, which has been established at the Federal Institute for Vocational Training (BIBB), with the task of co-ordination.



In addition to the organisation of events and activities at a national level and co-operation with the European Commission within the framework of the above-mentioned project funding, one of the main tasks of the NA at BIBB is to inform the public about the European Year of Languages. Both Deutsche Bahn AG and Siemens are national sponsors of the European Year of Languages.

## The information campaign

A variety of activities at European and national levels have been drawn up in order to inform as broad a public as possible in Europe about the subject of language learning and to draw attention to the advantages of a knowledge of foreign languages. Here in brief:

### EVENTS

The press and the informed public are the primary target groups for the opening and closing events. The German start-up conference took place in February of this year in Berlin. In her opening address, the Federal Minister for Education and Research, Edelgard Bulmahn, called for a "culture of multilingualism and with it (...) a culture of understanding", forwarding the goal "for young people all over Europe to speak two languages in addition to their native language". Speeches and discussions at the national start conference above all celebrated Europe's linguistic diversity and emphasised the importance of multilingualism. The specialist congress of the Länder held in June in Hamburg dealt with concrete questions of foreign language learning in vocational and general education schools. The last big German event of the year will be taking place on 16 November within the framework of the Expolingua language trade exhibition. This event is expressly seen not as the conclusion of the European Year of Languages, but rather as a "stock-taking conference" where that which has been achieved during the EYL can be brought together in order to guarantee its continuation. At this point, an action concept for language learning co-ordinated with all the actors of the German educational environment is to be made available and will contain a foreign language policy oriented towards multilingualism for all educational sectors and age groups.

### STUDIES

A study of 16,000 EU citizens was carried out by the European Commission in December of last year as part of the EYL focusing on the subject of foreign language learning, knowledge of foreign languages and foreign language requirements. According to this "Eurobarometer", across the EU 53 percent of the population currently speak one foreign language while 26 percent also speak a 2nd foreign

language. English, with 40 percent, is the top foreign language in Europe, ahead of French (19%) and German (10%). A lower knowledge of foreign languages prevails among the higher age groups in all foreign languages and countries.



In the coming year, national documentation of the EYL in Germany as well as a Europe-wide evaluation will supply information on the "European Year of Languages 2001" and its successes. Documentation will be provided on the extent to which the EYL has been able to push forward discussion of the subject of languages and national and European language policy.

### INTERNET

On the Internet at [www.eurolang2001.org](http://www.eurolang2001.org), the European Commission and the Council of Europe provide among other things information on foreign language programmes in the EU, statistical data on foreign language competence in the EU as well as useful links, games and discussion forums on the subject of foreign languages. There are also links to all the national co-ordinating offices. The results of the "Eurobarometer" are available in both English and French.

As part of the EYL, the NA at BIBB has also set up a special website at [www.na-bibb.de/ejs](http://www.na-bibb.de/ejs). This site provides information on the goals and areas of concentration in the European Year of Languages and reports on national events and EYL-funded projects in Germany. A database with a search function currently contains around 280 events. Information material from the European Commission can be ordered online; publications are also available for downloading.

### COMPETITIONS

The "Eurospiel der Sprachen" online lottery was set up at the EYL site of the NA at BIBB in mid-July. Up to 16 September, "virtual language travellers" of all ages can playfully test their knowledge of foreign languages as they search for the solution and discover interesting informa-

tion on the language regions of Europe along the way. The winners of the sponsored prizes will be determined at the end of September.

The importance of having a knowledge of foreign languages is also the subject of this year's competition for the Hermann Schmidt Prize. The honours for innovative vocational training will be awarded in November on the subject of "Imparting a knowledge of foreign languages in vocational training".

## INFORMATION AND ADVERTISING MATERIAL

The information material developed by the European Commission on the subject of language learning is meant for a broad public as well as to support multipliers in the educational sector. The material is being distributed together with national information material by the national co-ordination offices set up in the Member States, along with a variety of advertising material such as posters, pens, mouse pads and T-shirts.

## Project promotion

In addition to the above-mentioned activities, a variety of regional and local events and projects on the subject of learning languages are taking place within the framework of the EYL. The European week "Adults learn languages" at the beginning of May as well as 26 September 2001, which has been declared European Language Day, are two such focuses. The European Commission has made a total of nearly 6 million euros available for the co-funding of selected projects, which could be applied for in two application rounds. Thanks to intensive public relations work, it was possible to increase the participation of German institutions in the tendering rounds: in contrast to the 40 applications submitted to the NA at BIBB in the first round in October of last year, the number of applications in the second round in February of this year almost quadrupled to over 150. On the basis of a national recommended list, a body of experts in Brussels made the final decision on the projects to be funded. Out of 1,300 applications from all over Europe, 189 projects were selected for funding. For Germany, 6 of the 43 in the first round and 18 of the total of 142 projects in the second round were selected. The projects themselves are deliberately not being conceived as projects for the development of innovative methods and materials in the area of foreign languages. This type of funding is available within the framework of other EU programmes (Leonardo da Vinci - language skills for vocational training, Socrates - language for general education). The projects of the European Year of Languages 2001 are without exception publicly effective, informative activities with the goal of stimulating language learning. They extend from local language festivals and open days, competitions, newspaper supplements, theatre projects and poster series to specialist conferences.

Happily there are many interesting partnerships between representatives from the various sectors of the (language) education world among the applicants, who have come together in order to aid jointly in the realisation of the goals of the EYL. This strengthens hopes that the European Year of Languages 2001 will only be the beginning of a development ultimately involving all social forces so that foreign language learning will become natural to all European citizens, bringing Europe even closer together. ■

# Bildung für Europa Information from Europe



## bildung für europa

is the information service of the National Agency (NA) of the same name at the Federal Institute for Vocational Training (BIBB). The service is provided in co-operation with Carl Duisberg Gesellschaft (CDG), the German Academic Exchange Service (DAAD) and the Federal Labour Office (BA).

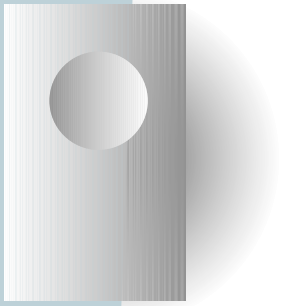
bildung für europa provides continuous and cross-programme information on the area of responsibility of the National Agency:

- the European vocational training programme LEONARDO DA VINCI
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- the newest EU initiatives in the area of language promotion, for example the awarding of the European Language Seal as well as the European Year of Languages.

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## Intercultural learning between West and East

HEROLD GROSS

### The East-West auditorium. Intercultural learning between West and East.

Klaus Erdmann, Heinz Theisen (ed.)

Wostok Verlag, Berlin 2000, 196 pages, DM 30.00

The cover shows a sectional view of a building site. The building site was the TRANSFORM programme of the Federal Government carried out in the context of the reorganisation of the successor states and societies of the former Eastern bloc. The articles resulted from the varying experience of lecturers, advisors and students in the encounter between west and east. An attempt is made to transfer the experience and approaches gained in the area of educational co-operation - beyond TRANSFORM and the interaction between Germany and the countries of central and eastern Europe - and to make this available for intercultural work in general.

*Klaus Erdmann* attempts to interpret the particular experience against the background of the general process of globalisation and to derive a general strategy of intercultural understanding in his first article: *"Abschied vom Institutionellen - Erfahrung und Begegnung als Grundlage einer kulturellen Hermeneutik"*. "Globalisation" - in the form of economic integration, including pressure towards modernisation in the sense of universalisation, westernisation and supply-oriented capitalism - has also given rise to a counter-tendency towards increased cultural differentiation. Even for the showpiece sector of globalisation, internationally-operating businesses, the cultural differentiation of the world represents a not-to-be-underestimated

barrier. A chance to overcome this barrier lies in the *"farewell to institutions"*, in an emphasis on the personal dimension of the encounter with those operating internationally in specific interrelations.

Possible learning processes at the "micro" level of personal encounters should not be blocked at the systems level by incompatibly confrontational objectives. One can only really learn through common subjects and goals, but the "institutional" provides a framework for interaction and offers protection from pressure (see the importance of the protective function of overall agreements in the contribution by *Michael Staack*, *"West-östliche Bildungscooperation in der Republik Belarus"*). The academic lecture hall, the "Hörsaal" of the title, is also to be understood metaphorically and expanded to include all experiential and learning spaces for personal encounters free from system-conditioned constraints and pre-formations. The importance of a political analysis of the field and sphere of activity is shown in the articles by *Alexandra Guturova* (*Entstehung der Demokratie und der Bürgergesellschaft in Russland*) and *Kirk Mildner* (*Policy Learning in der Transformation*). Mildner's report is a convincing application of an analytical concept and contains valuable stimuli for policy and practice in international consultation and co-operation.

The way in which one can achieve results in concrete situations despite considerable differences in cultural and political systems through a readiness to learn and rethink, through the flexible adaptation of seemingly solid concepts and especially by taking into account the factors of personality and personal encounter, is discussed in the articles by *Gulmira Raissova* (*Arbeitswelt und Menschenbild - Erfahrungen aus Kasachstan*) and *Klaus Erdmann* (*Der öffentliche Dienst als "lernende Organisation" - Verwaltungsreform in Kasachstan*).

All the authors agree that the demands of globalisation can in the end only be met through mutual learning. Between the extremes of hopes for world unity and crippling intercultural pessimism, they attempt to find usable paths of mutual learning.

Intercultural learning brings about attitudinal and behavioural changes which can lead to changes in system structures or at least constitute prerequisites for these changes, and open up new opportunities for interaction at systems level. (See here as well the article by *Heinz Theisen*, *Gemeinsames Lernen für Stabilität und Entwicklung in Europa. Aufgaben, Erfahrungen und Perspektiven*). International educational co-operation appears to be appropriate and should not be reduced on account of tensions and disappointments, but rather strengthened. ■

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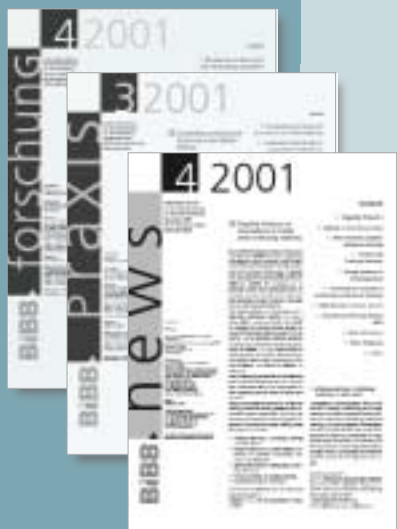
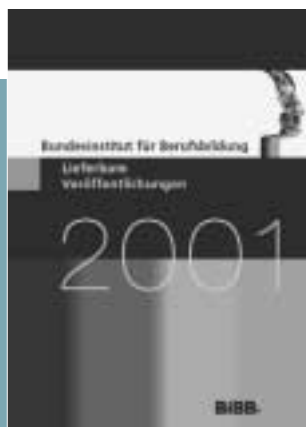
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# International vocational training



## **Berufliche Qualifizierung und Lernende Region** Entwicklungen im deutsch-niederländischen Systemvergleich

Berichte zur beruflichen Bildung, vol. 246

Ben Hövels, Günter Kutscha

Globalisation and accelerated processing of new technologies require flexible and decentralised solutions in order to set in motion "bottom-up" processes of self-organisation and responsibility. This volume aims at explaining concepts of the "learning region" and their guiding principles and inquires into realisation strategies, overall institutional conditions and actors involved in regional vocational training policy-making and innovative developments in a systemic comparison of vocational training systems in Germany and the Netherlands.

Federal Institute for Vocational Training (BIBB)

Bielefeld 2001, ISBN 3-7639-0932-X, Order No. 102-246, 144 pages, 39.00 DM, 19.90 euros



## **Internationalisierung des Mittelstandes** Strategien zur internationalen Qualifizierung in kleinen und mittleren Unternehmen Mit Checkliste zu Qualifikationen für die Internationalisierung

Ekbert Hering, Waldemar Pförtsch, Peter Wordelmann

Explicit ideas about a future "international training culture" are indispensable for the successful internationalisation of vocational training. They should also characterise the guiding principles of enterprises involved in international competition. This is at the heart of the study, which is based on case studies and workplace analyses in internationally-operating companies.

Federal Institute for Vocational Training (BIBB)

Bielefeld 2001, ISBN 3-7639-0926-5, Order No. 102-244, 120 pages, 34.00 DM, 17.30 euros



## **Duale Ausbildungssysteme** Institutionelle Rahmenbedingungen und Leistungsfähigkeit der dualen Ausbildung im Baugewerbe

Uwe Grünewald, Dick Moraal (ed.)

Vocational training in the dual system of vocational/educational training today remains a system which is often praised by experts but which has stimulated very few countries to imitation. The results of a European LEONARDO project provide information on possible reasons for the anomalous status of the dual system.

Federal Institute for Vocational Training (BIBB)

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