

No 15 September 1984/II

# Distance learning

## Editorial

Distance studies in Europe – experience and comparisons

*W. Karow*

Distance studies: between initial and continuing training, between formal and informal education

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The role of the media in the cultural and vocational advancement of the individual

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What the Council of Europe has done for the development of distance studies in Europe

*M. Vorbeck*

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In Denmark

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In Ireland

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Open space

Vocational training



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In French and Italian, the term 'to form' – possibly derived from the plastic arts – is used to describe the act of educating and training. The term reflected the social aim of moulding the younger generation to conform with what society accepted as its scale of values. The young person was viewed as the 'raw material' on which to work, while the educator was seen as a mediator between family and society, between the individual and the public. From this arose the rather romantic image of the teacher as missionary, the hero of many nineteenth century novels.

All this now seems somewhat remote, something that is no more. Mediation between family and society occurs at many different levels and takes different forms: the media, for example thrust a bridge right into the intimate nucleus of the family, and even the youngest children often lose their sense of wonder and imagination by being forced to cross that bridge to the adult world too early.

Education and training can no longer be seen as merely an *episode* in life, a stage in the young person's journey towards *civitas*; rather is it a *process* that unfolds throughout an individual's existence.

The changes taking place in our social and economic system inevitably affect both our educational system and our ways of teaching and learning.

At the same time, new technology is both a cause and a vector of change; it leads not only to new educational and training policies and strategies but also to new ways of teaching and learning.

In this context, we feel it is of interest to take a look at *distance training*.

It is no means a new idea, having been in existence for several decades. The ventures now springing up, however, reflect a new spirit and draw on the resources created by today's technology. Distance training provides a fresh solution to a new form of educational demand. Furthermore, this demand and this solution come within a context that differs radically from the setting in which the idea of distance learning originally took shape.

## A new demand

Merely to touch on the subject is not without its risk: if it is viewed too summarily, we may end by over-generalizing.

We shall, however, take this risk. It appears that those seeking vocational training are not unaware of broader changes in the general context. Individuals feel the need to acquire a cultural baggage and capitalize on new knowledge and experience in order to maintain their general education and improve their standard of vocational skill. More and more people wish to broaden their general education and improve their technical and occupational abilities without these necessarily being strictly job-related. Among those wanting to learn, there is a growing trend to see education and training as part of an overall plan of life in which work and leisure pursuits, vocational concerns and broader interests, interact. There is, then, a move towards greater individualization of training projects and paths to education. Where this kind of demand for training exists, distance learning is a solution that can be adapted to fit in with the time an individual can devote to learning, the rate at which he learns and his pattern of living.

The potential and existing demand for distance learning is new not just in terms of quantitative growth but also in quality. Users now want more than just to improve their education in general; they hope to acquire technical expertise that will be of value to them in the working world.

## The changing nature of distance education on offer

Distance education, as we have said, is not a new experience, but some of its new connotations and practical aspects may well have a quite considerable impact on the body of accumulated experience. One of the main factors is that sophisticated communication technology opens out new paths and broadens the horizons for distance education. Another factor is the ever wider use of

distance learning in both public and private sectors without an established tradition in this sphere.

In practical terms, distance learning seems to be moving away from 'self-education' or 'guided self-education' and towards a process of close-knit interaction between instructor and student, as part of a system of mutual checks and assessments – in other words towards the format typical of the vocational training system. There is also a change in the traditional roles of the teacher and the taught. New types of mediator in the educational relationship are coming into being: group leaders, software writers, tutors, etc.

These changes are less evident or substantial in countries in which distance training had been in existence longest, where more sophisticated formats and structures such as the open university have gradually evolved.

## A new context

As we have pointed out, the context for the distance education sought and on offer today differs from the setting in which distance education experiments were originally launched. To take just one example, there is a new requirement for technical literacy in the passive and active use of information technology and the devices based on that technology. It is often hard for continuing education schemes to satisfy that need, especially as it arises to differing degrees at many different levels of potential users. Many bodies in the public and private sector, faced with the need to impart technical literacy, may well view distance training channels as useful. The 'Informatix' programme produced in Belgium is a good example. Another instance of the changing context is the proliferation of public and private radio and television stations in some countries, offering fresh potential for distance education.

All this is leading to renewed interest in distance training and its range of potential

new applications; it may well pave the way for further cooperation between the public and private sector, especially in the European Community.

There is good reason, then, for our interest in the subject we have taken as the theme of this issue, although there remain many

questions to which we have not wished or have been unable to hazard a reply: what are the social, educational and financial advantages of distance training? What about distance education methods? In essence, what is the justification for distance training? The questions we have raised also

underlie a project that has just been launched by Cedefop. In this issue of *Vocational Training* we wish to stress our concern for the subject, knowing that it also arouses widespread, well-motivated interest among many officials and practitioners.

D. G.



# Distance studies in Europe

W. Karow

*The educational, economic and didactic/methodological importance which the European countries attach to distance studies in adult education varies. In many cases, State distance-study courses have only recently begun to play a major role alongside the courses offered by private companies. Flexible planning of continuing training might include private distance-study courses generally governed by legislation and assisted by the State on the Scandinavian model. State responsibility for the overall education system, on the other hand, makes solutions like the French CNTE seem plausible.*

## Experience and comparisons<sup>1</sup> Distance studies – Present and potential uses

In most countries of the European Community and in other European countries the use made of distance studies as an educational tool varies, as the following figures show:<sup>1</sup>

However, the educational, economic and didactic/methodological potential of distance studies does not yet seem to have been fully tapped.

The *educational* potential of distance studies lies, among other things, in its ability to reach a very large number of people seeking education and so to democratize access to educational opportunities. The Open Uni-

versity in the United Kingdom, for example, is open to everyone, there being no special admission requirements.

The *economic* potential of distance studies stems, for example, from the way in which it is organized, enabling very small organizing units to look after very large numbers of participants. For instance, what was probably the world's largest distance-study institute in the late 1960s, Hermods in Sweden, had a permanent staff of only 370 to cope with 200 000 students. By 1975 a staff of only 65 at the same institute was catering for the needs of 60 000 students. Teaching material can be produced as needed. Spe-

cific, scattered target groups can be approached simultaneously and in a concentrated manner. Employment need not be interrupted for continuing vocational training and can even be combined didactically with this training.

The *didactic/methodological* potential of this form of study is clear from the following aspects:

■ *the range of media used:* although printed teaching material is the medium most commonly used in distance studies, there are many other tools, such as audio cassettes, video cassettes, experimenting

| Country     | Millions of inhabitants approx. | Participants per 100 000 inhabitants | up to 1 000 2 000 3 000 4 000 5 000 |
|-------------|---------------------------------|--------------------------------------|-------------------------------------|
| Norway      | 4                               | 5 000                                |                                     |
| Finland     | 4.7                             | 1 490                                |                                     |
| Netherlands | 13.6                            | 1 260                                |                                     |
| Sweden      | 8.2                             | 1 220                                |                                     |
| UK          | 56                              | 890                                  |                                     |
| Spain       | 35                              | 660                                  |                                     |
| Belgium     | 10                              | 650                                  |                                     |
| Switzerland | 6.4                             | 630                                  |                                     |
| France      | 52.7                            | 620                                  |                                     |
| Austria     | 7.5                             | 570                                  |                                     |
| Denmark     | 4.9                             | 510                                  |                                     |
| FRG         | 62                              | 160                                  |                                     |
| Italy       | 54                              | 150                                  |                                     |

Source: See Note 1.

kits and even supplementary 'live' instruction; television and radio are also frequently used in distance studies;

■ *the quality of teaching material*: unlike oral, or 'live', teaching, distance studies enable every word to be checked (and in many countries this is done by government or other agencies). Distance-study courses based on a guide and essays, journals or new books can be kept right up to date and immediately adjusted to advances in technology and industry;

■ *the range of contents*: distance-study courses are available at many levels: university, continuing and initial vocational training, repeat school certificate examinations, languages and leisure activities;

■ *the degrees of freedom enjoyed by participants*: studies in various countries have revealed that people are principally attracted to distance studies by the fact that:

- they can learn when and where they like,
- they can learn as quickly and intensively as they like,
- distance studies are more compatible with other private and occupational interests than 'live' instruction,
- participants are completely free to decide whether they will take examinations and submit to checks on their progress by others.

Despite this, those who take distance-study courses are not left entirely on their own, the distance-study centre providing didactic services, correcting work sent in, giving general advice on the participant's progress and advising on individual queries.

These advantages of distance studies are exploited to widely varying degrees in the countries of the Community and elsewhere in Europe. The scale, status and image of distance studies, the controls to which they are subject, the assistance granted by governments, didactic quality, the relationship between public and private distance-study institutions and the extent to which this area is covered by educational science and pedagogical research vary substantially.

## The organizers and participants

In almost all the countries that have been studied the organizers of distance studies can be divided into three groups:

■ First, State institutions like the Open University in the United Kingdom, the Hagen Fernuniversität in the Federal Republic, the Universidad Nacional de Educación a Distancia in Spain and the Centre National de Télé-Enseignement in France; they also include authorities, military institutions (e.g. Försvarets breviskolan in Sweden) and State schools (e.g. the *Land* vocational schools in Schleswig-Holstein) and finally – with some qualification – radio and television stations.

■ Second, private, non-profit-making institutions run by professional organizations, religious communities, trade unions, industrial associations or large firms to provide their target groups with what is usually very specialized continuing training (e.g. the training of master craftsmen, specialist salesmen).

■ Third, commercial firms offering a very wide, but very specialized range of courses. This is the largest of the three groups in terms of both the number of firms providing such courses and the number of participants. While they have been educationally important in some countries (Federal Republic, France, Austria, Switzerland), some have caused serious problems from time to time, when excesses of free enterprise have affected both the pockets and the ideals of many people seeking an education. But this can generally be regarded as a thing of the past, now that many countries have introduced legislation on the private distance-study sector. It can now be said that they make a major contribution to continuing training.

*A comparison of these three groups reveals further distinguishing features:*

■ The State institutions differ from their private counterparts in that they can themselves award certificates of proficiency to course graduates (e.g. university diplomas and school certificates). They usually employ a large staff. In 1975, for example, the Centre National de Télé-Enseignement had 1 038 employees on the administrative side and 4 309 on the educational side for 174 216 students, while the Open University in Britain had a permanent staff of 2 000 to cope with 56 000 students. The teaching staff are highly professional. The range of course offered is usually limited. The courses themselves constitute the largest cost item (accounting for about 50 % of total expenditure).

■ Although private non-profit-making institutes may not award State certificates, the

certificates they do award carry weight in the spheres of influence of the sectoral or professional organizations and associations to which they belong. Where teaching staff are concerned, they tend to resemble the private commercial institutes. They operate with a limited administrative staff and employ moderate numbers of professional teachers. The range of training offered is very limited, often consisting of only one course. Here again, the courses themselves represent the largest cost item (between 30 and 50 % of total expenditure). These institutes play an important part in the teaching of skills in continuing vocational training.

Private commercial firms may not as a rule award certificates of proficiency, but they do prepare students for examinations set by State or other examining bodies (e.g. chambers of trade and industry). Certificates awarded by these firms do not usually carry any weight in the labour market. (There are exceptions, however, as examples in the Netherlands and Norway show.) The range of courses available is generally very wide. The number of staff is kept to a minimum, and as profitability is the primary concern, most private firms employ few professional teachers. Advertising is the largest cost item (accounting for some 40 % of total expenditure compared to 18 % for the actual courses).

While the organizers of distance-study courses thus vary considerably in certain respects, the participants tend to be fairly similar in structure.

■ The majority are 20 to 30 years old, although in the United Kingdom, Belgium and France a fairly large proportion (10 to 30 %) are under 20. This is an interesting feature since distance studies are generally classified as adult education.

■ The discrimination against women in education is carried over into distance studies. Continuing vocational training courses rarely include more and usually fewer than 10 % women. The situation is, however, different in the case of courses leading to school certificates and university diplomas, where courses have included up to 43 % women (in Sweden), but on the whole they are under-represented.

■ The 'educational background/continuing training syndrome' is also to be found among participants in distance-study courses: those who are not used to learning and have had a poor education play no part in voluntary continuing training, which means that those who need further educa-





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tion most take part in the smallest numbers. 'Like all participants in continuing training, those who take distance-study courses have had an above-average education and vocational training.'<sup>2</sup>

■ Participants in distance-study courses are often assumed to live in sparsely populated areas without easy access to 'live' education. However, this is refuted by all the surveys that have been carried out. They show that participants in distance studies are concentrated in densely populated areas where there is a good alternative range of education. What is true of continuing training generally is also true here: it is sought where it is needed most, and that is more likely to be in an industrial area than a rural area. Nor do the large numbers of participants in the thinly populated Scandinavian countries disprove this contention, since here too participants in distance-study courses are concentrated in the industrial centres.

The typical European participant in a distance-study course is thus about 20 to 30 years old, male, with a good educational background, married and living in comfortable circumstances either in or near an industrial centre, where he has access to good alternative continuing training facilities.

He takes a distance-study course because he wants to get on professionally and yet prefers not to leave his familiar, private environment.

## Development of distance studies in Europe

In the countries covered by this survey the development of distance studies has been fairly uniform and can be divided into four phases. Once a good postal communication system had been set up at the end of the last century, various people began to send out letters containing useful information. They included Isaac Pitman, who summarized the rules of shorthand on postcards and sent his students passages from the Bible in shorthand. This initiative later gave rise to the 'Pitmans Correspondence College', which was active throughout the world. In Germany, *Toussaint and Langenscheidt* introduced language courses by correspondence, and in Sweden, *Hans Svensson Hermod* did the same with commercial courses.

In the first third of the twentieth century there were a number of large private correspondence institutions, particularly in coun-

tries which had become colonial powers. Many of the administrators in the colonies improved their own education or that of their children through correspondence courses. External examinations enabled them to add to their qualifications. The private correspondence schools were then joined by non-commercial and State institutes. Colleges provided preparatory courses by the correspondence method, trade unions trained their officials in the same way, and in Germany the first link was forged between a private correspondence school, Jena, and a radio station.

During the Second World War the military authorities of many countries seized on the idea of training by correspondence. Using private correspondence institutions or their own facilities (e.g. *Försvarets breviskolan* in Sweden), they organized continuing training for soldiers (and, in Sweden's case, so reduced the time reserves spent on exercises). One State distance-study institution to emerge from the war is the Centre National de Télé-Enseignement (CNTE), which was established in 1939 to provide regular tuition for schoolchildren whose education was suffering because of the war. This idea stemmed from the private distance-study sector (*École Universelle*).

In post-war Europe distance studies became an instrument of education policies in at least three respects. Firstly, State distance-study institutions at college and grammar school level emerged in increasing numbers. In many cases, advantage was taken of the experience that had been gained by private distance-study schools. This was true of the Open University in Britain, the Universidad Nacional de Educación a Distancia in Spain, the Hagen Fernuniversität in Germany and the decentralized distance-study college courses in Sweden.

In addition, the development of the media resulted in a growing range of multi-media courses. In some instances the radio and television went their own way, in others they cooperated with conventional distance-study institutions to provide a wide range of continuing training. Examples in the Federal Republic are the 'Funkkolleg' and the 'Telekolleg'. In Belgium and Sweden the major communications media assist with the continuing training of teachers. In France the CNTE cooperates with the radio and television corporations. In Italy the 'Telescuola' has enabled many adults to

take school certificates, the introduction of the 'scuola media' having increased the education gap between the older and younger generations.

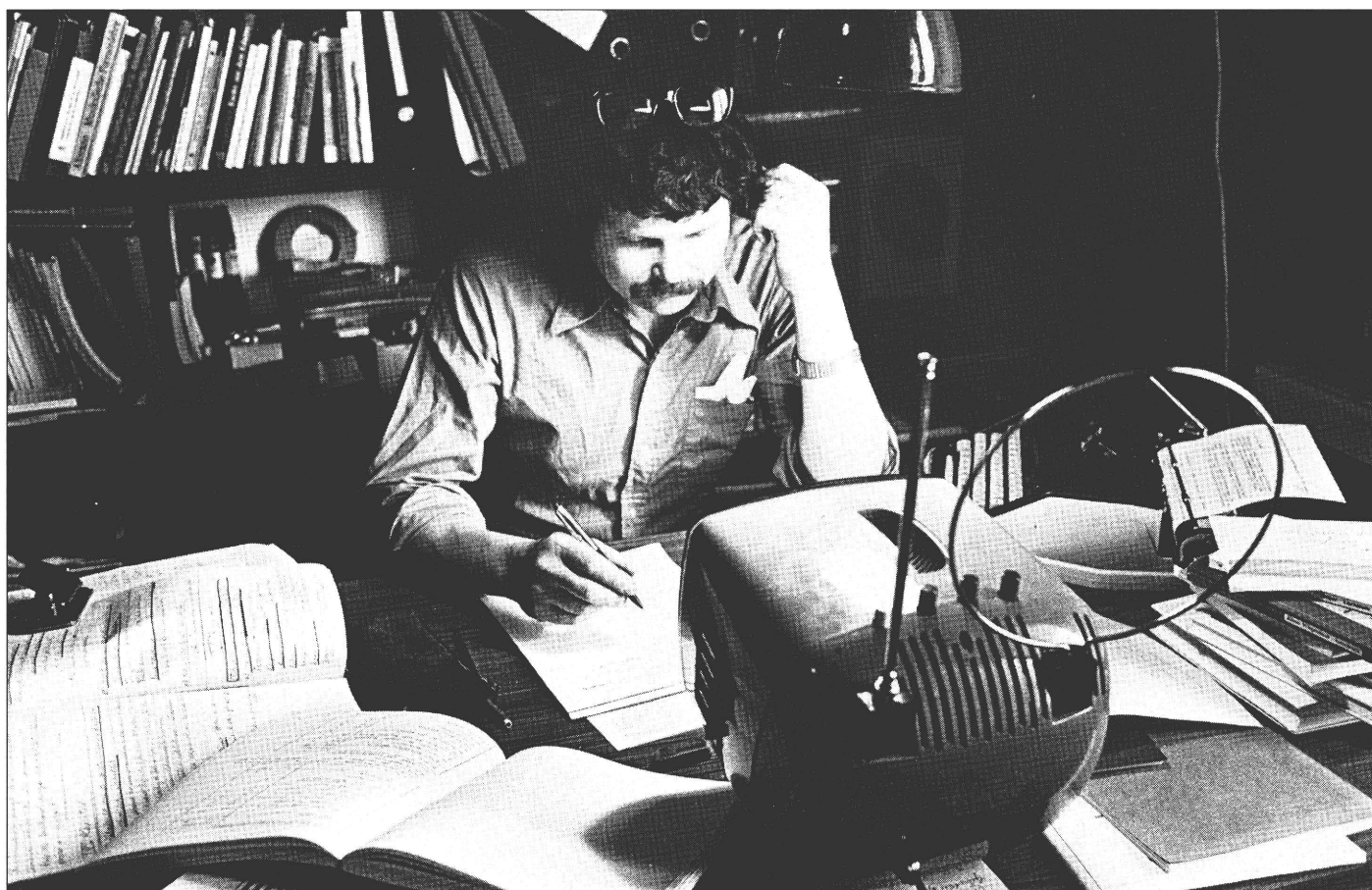
Thirdly, despite the growth of State or public distance studies involving the use of traditional and electronic media, private distance-study courses continue to play an important role. They have in fact increasingly been recognized and used as an instrument of adult education. To permit their integration into State education planning, special legislation on distance studies has been passed in a number of countries, and they are now included in the legislation governing the assistance provided by the labour market authorities. Private distance-study schools and, in some cases, their teaching material are scrutinized, and approval is given only if certain minimum requirements are satisfied. Participants are refunded all or part of the cost of distance-study courses in which they learn skills.

In the Scandinavian countries the State not only contributes towards the cost of dis-

tance studies but also assists private distance-study schools in other ways. They sometimes participate in major education projects, for example, by providing the printed material for multi-media courses or teaching material for State distance-study institutions and correcting the students' work. A further major requirement, if appropriate use is to be made of private educational resources in public education, is that participants in distance studies should be admitted to State or other external examinations. The private distance-study sector in Britain provides many examples of this: the University of London examining board and the 'recognized examining bodies' of associations representing industry, professions and firms.

### Home study in the planning of education

An examination of distance studies in the various countries of Europe reveals two possible ways in which those responsible for taking the decisions on State education



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might take advantage of distance studies on economic grounds or in the didactic shaping of adult education courses (open learning trend). This does not yet take account of the skill-teaching aspect of continuing training. It is clear, however, that a further important aspect of distance studies to be borne in mind even now is that they can enable workers to take advantage of the increasing leisure time at their disposal.

Firstly, Norway, Sweden, Finland and the Netherlands, for example, show that distance studies can play an educationally significant and accepted role as a sub-system of a country's overall education system. If it is to be supported in this role, there must clearly be:

- liberal legislation to govern private distance studies;
- appropriate consideration of participants in and organizers of distance-study courses in assistance measures of an individual and institutional nature;
- selective utilization and informal control of the resources of the private distance-study sector in the public education

system and in further vocational training and retraining, as is the case in Norway, Sweden and Finland;

- general access to the public examination and qualification systems for graduates of private distance-study institutions and extensive information on such examinations and admission requirements;

- a circumspect to cautious attitude on the part of the State towards the establishment of public distance-study systems which may compete with and oust private distance-study institutes by pursuing the same educational objectives.

The main advantages to be derived from a policy on distance studies of this kind are economic in nature. A system assisted in this way enables the public education administration to satisfy demand for education without drawing directly on its own resources. The private distance-study sector obeys the laws of supply and demand within limits that can be calculated and defined. Demand can be increased by means of government advertising campaigns relating to education. However, an education policy

on distance studies that is defined in this way raises problems of different kinds.

□ *Firstly*, there is the question of retaining the commercial element. When planning what courses they intend to offer, even non-commercial private distance-study institutes must always ensure their costs will be covered. They will never offer courses if participation is unlikely to cover the costs involved. Demand in marginal areas and among important splinter groups in the education system thus remains largely unsatisfied by the private sector. From an educational point of view this is unsatisfactory and also conflicts with the political goal of making as much of the overall education system as possible a government responsibility.

□ *Secondly*, if education policy pursues such ideas with a view perhaps to 'strengthening State responsibility for the structures of the education system', the scope for private initiative in the education sector will be reduced. The appropriate course of action is then to establish and assist public distance-study institutions which – like the



CNTE in France – take over every conceivable distance-study course that leads to the award of a certificate and leave the private distance-study sector the residual areas of vocational and above all leisure-oriented courses. Some of the advantages of this approach, from which the participants in such distance-study courses would benefit most, are that:

- State or public distance-study institutions can build up a large and competent permanent staff;

- the courses acquire a status in public law, thus solving the problem of linking the

distance-study system, the certification system and the employment system;

- courses can be provided for special target groups and small groups with specific requirements without regards for costs and benefits.

The economic advantages of the first trend, which consist in the limited funds required to finance a limited range of educational opportunities, contrasts with the possibility of using distance studies in all its various forms in the second case. This also appears to be the trend that will eventually allow all the positive features of distance studies to

be fully exploited and so to produce the greatest educational benefits.

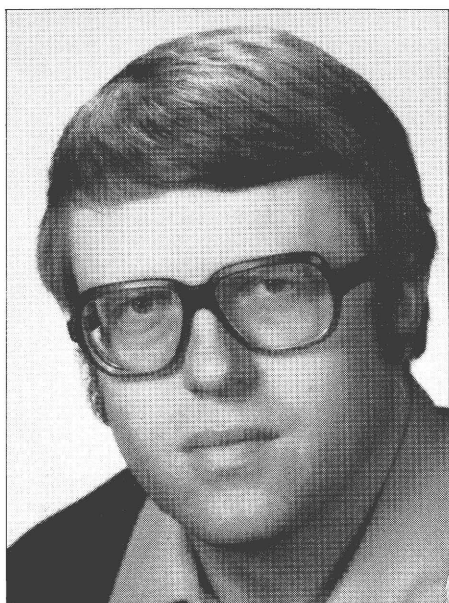
#### Notes

<sup>1</sup> This article is based on a survey which the Federal Institute for Vocational Training began in 1975 and completed in 1979. It covered the following European countries: Austria, Belgium, Denmark, the Federal Republic of Germany, Finland, France, Italy, the Netherlands, Norway, Spain, Sweden, Switzerland and the United Kingdom.

See KAROW, WILLI: *Privater Fernunterricht in der Bundesrepublik Deutschland und im Ausland*, Hannover, Schroedel-Verlag 1980 (Schriften zur Berufsbildungsforschung, Vol. 58).

<sup>2</sup> EHMANN, CH.: 'Bildungsentscheidung von Fernunterrichtsteilnehmern', in *BWP* 2/1983, p. 47.





# Distance studies

**between initial and continuing training, between formal and informal education**

*Ch. Ehmann*

*The rising level of education in the population and the increasing amount of free time people have are accompanied by a growing interest in forms of education which can be pursued after working hours. Distance studies are one such form of education.*

*The wider range of educational interests plus the inflexibility of the public education system is leading to a growth of interest in individualized educational opportunities like those presented by distance studies. A clear sign of the increase in the importance attached to distance studies since the early 1970s has been the establishment of a number of open universities in the European Community countries.*

*The 'new media' will continue to play a limited role in distance studies – as in education as a whole. Compared with written material, they are too inflexible and too costly.*

The importance of distance studies has grown in all the European countries since the early 1970s. A clear sign of the recognition of this form of education is the establishment of open universities in the United Kingdom, Spain, the Netherlands and the Federal Republic of Germany. The establishment of the Open University in Britain in particular has influenced such non-European countries as Israel, Iran and Japan, to name but a few.

The acceptance of this method as a suitable means of teaching even academic qualifications has also led to greater value being attached to pre-university education in distance-study form.

Distance studies are now experiencing their third boom in the last 100 years. This article discusses the causes of this change of fortune and the prospects for the integration of distance studies into the planning of education.

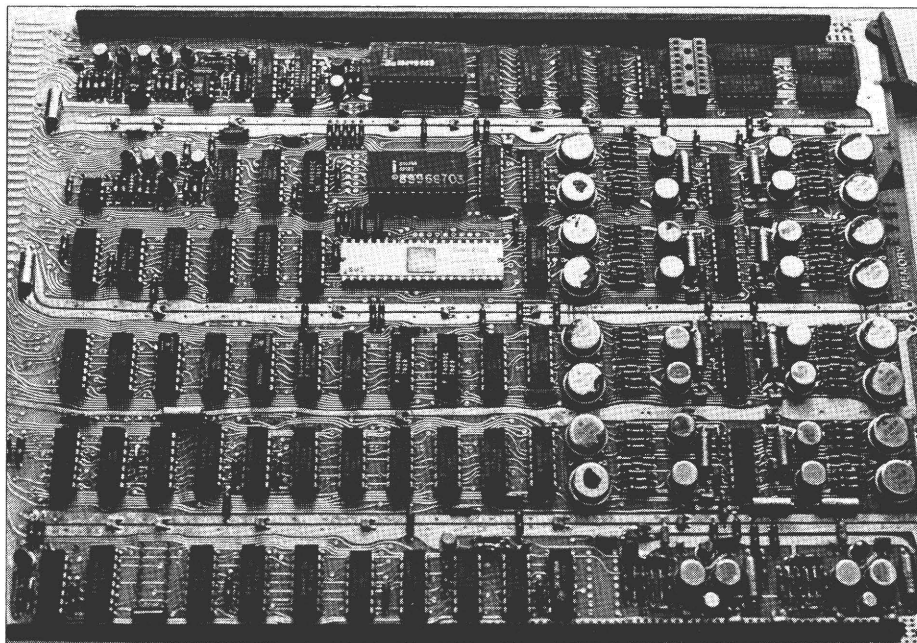
## **Structural change in the economy and society**

Distance studies first flourished in the second half of the nineteenth century, when industrialization deprived traditional skills of some of their value. The importance of agriculture and the crafts waned, while trade and administrative activities in industry expanded. A 'new class' of employees, also known as 'private-sector civil servants' in Germany, emerged.

The traditional education system, which was designed, in Germany especially, less to teach the people occupational skills than to ensure their loyalty to the throne and the Church, was no match for the new requirements. This was true not only of the teaching of technical or commercial skills but also of the desire felt even by adults to become 'better educated', i.e. to learn a foreign language, to acquire a knowledge of literature or even to learn to play the piano.

The inadequacy of the traditional education system also led to the second boom in distance studies in the years immediately after the Second World War, particularly in the countries of Central and Eastern Europe. 'For socialist development the working class required intelligence derived from its own ranks and from the working peasantry and closely associated with it.' A high-speed method was needed to 'provide the active proponents of development in positions of responsibility in government and the party, in the economy and the education system with the theoretical equipment they needed for their task'. Distance studies were used for this purpose because it was impossible 'to release all those in need of a university education from the work process while they attended such courses, not only for economic reasons but also on personal grounds (age, family commitments)'. Here again fundamental changes in society had to be explained and stimulated with a broadly effective form of education.

The importance attached to distance studies



in the Western industrialized countries and the Third World countries associated with them increased in the 1970s for both economic and social reasons. The 'third industrial revolution' not only wrought substantial structural changes in production and the service sector but – undoubtedly due in part to the growth in the potential for destruction in the world – prompted more people to question the purpose of life and study the history of the society in which they lived, its cultural features and the living conditions for which it provided.

The conclusion to be drawn from past developments is that distance studies enable a large number of people to react quickly and effectively to fundamental changes in technology, the economy and society. What is taught in schools, and State schools in particular, is largely confined to the general or dominant view in society. This system is not suited to adjusting quickly to new requirements or to assimilating and teaching newly acquired knowledge. Similarly, the adult education system based on 'live' teaching is unable to train enough teachers in a short period to meet the demand for education in new areas. For example, the large-scale introduction of colour television in the Federal Republic in 1967 was possible because Standard Elektrik Lorenz (SEL) simultaneously offered a distance-study course in which dealers could learn how to service and repair the colour television sets they were selling. Before long 7 000 people had taken the course, which also included seminars.

### The present importance of distance studies

Apart from the technological and social causes of the growth of interest in this form of continuing training in the 1970s, there are various other aspects that explain the rapid rise in the number of participants in distance studies, which has more than doubled in the Federal Republic in the last 10 years.

Firstly, there is a tendency in all the Western industrialized countries to make the individual bear the cost of education in general and continuing training in particular. While the successful launching of the Sputnik was followed by a substantial increase in government spending on education in the 1960s and even the early 1970s, the economic crisis that has continued since 1973 led employers and governments to change their policies on spending in the education sector, which had previously been complementary in their effects. Government assistance was constantly reduced, thus shifting the financial burden on to the individual. At the same time, employers were no longer precepted. It was realized that the individual's identification with a given activity would be just as likely to give him an insight into the future development of his occupation or of the qualifications required as a forecast by a professional market intelligence service. Distance studies are, however, best suited to taking account of such individual aspects in continuing training. They are able to satisfy

demand in places where only a few people have the same educational interests. Although the range of distance studies offered in the Federal Republic is by no means so varied that all educational needs can be met, it is constantly growing.

### Distance studies in initial training

As the above comments were designed to show, distance studies are intended for people who want to acquire additional qualifications while continuing their normal gainful activities. Participation in distance studies requires a high level of initiative and ability to take decisions, particularly on what is to be learnt.

These requirements are not satisfied in initial training, where the syllabus is fixed and the trainers are at hand. The aim here is to introduce young people to a wide range of activities for the first time. This is best done through personal contact and direct confrontation with the new tasks to be performed. There is no evidence of distance studies improving the training of young people. What favourable reports there are on the use of distance-study material in initial training usually concern correspondence courses in support of the traditional form of training. Attempts have been made from time to time to use distance studies to teach subjects which the firm providing the training cannot adequately cover. But again, these are not distance studies in the true sense but a supplement to the firm's training efforts.

Added to this, it is feared that the inclusion of distance-study material in the training process will make it easier for certain phases of training to be transferred from normal working hours to leisure time: the trainee will not be taught in the firm but told to go through the distance-study material at home. It is principally due to this factor, i.e. the fear that distance-study material would lead to the establishment of something akin to a Sunday school, that trade unions are opposed to its use in initial training.

Irrespective of the fear the existing forms of training would be jeopardized, it can generally be said that distance studies are more appropriate when the participant has some experience, in the area in which he wishes to learn additional skills. They are therefore very useful where adults who have been working in a given occupation for several years now want to acquire a formal qualification.

## New media as an extension of distance studies

The Open University in the United Kingdom undoubtedly owes its great success not least to the fact that radio and television have played their part in the learning process. On the other hand, the growth rates in participation in distance studies in other countries have been achieved without the media being involved in any way. Caution should therefore be exercised in any assessment of the importance of the 'new media' for the continued development of distance studies.

This is also true of such new projects as Bildschirmtext (Btx). The team which studied the Bildschirmtext's trial run in Berlin state in their summary: 'The educational institutions have so far been extremely reticent to take part (in Btx). This can be attributed to the fact that Btx is unable to offer better solutions to crucial problems in the education sector: proposing learning processes and shaping learning situations.

Live teaching is still superior to technical instruction. A comparative study has also shown that, as a text medium for learning, the screen is inferior to the book.'<sup>3</sup>

Like the computer, the 'new media' were not developed for educational purposes. Attempts to present them now as suitable educational instruments are principally designed to persuade the authorities to participate in the initial expense by equipping schools, etc. with such devices and so reduce the risk to the manufacturer. It may, of course, be more appropriate to demonstrate movements with moving pictures than with illustrations in books. But it must always be realized that all technical media – with one exception, to which I will refer below – are far more expensive and inflexible in their use than books: video cassettes and disks cannot be 'leafed through' wherever the user may be.

A real extension to the range of distance-study media has been the use of the cassette recorder in language teaching, since it is so easy to handle and can be used in

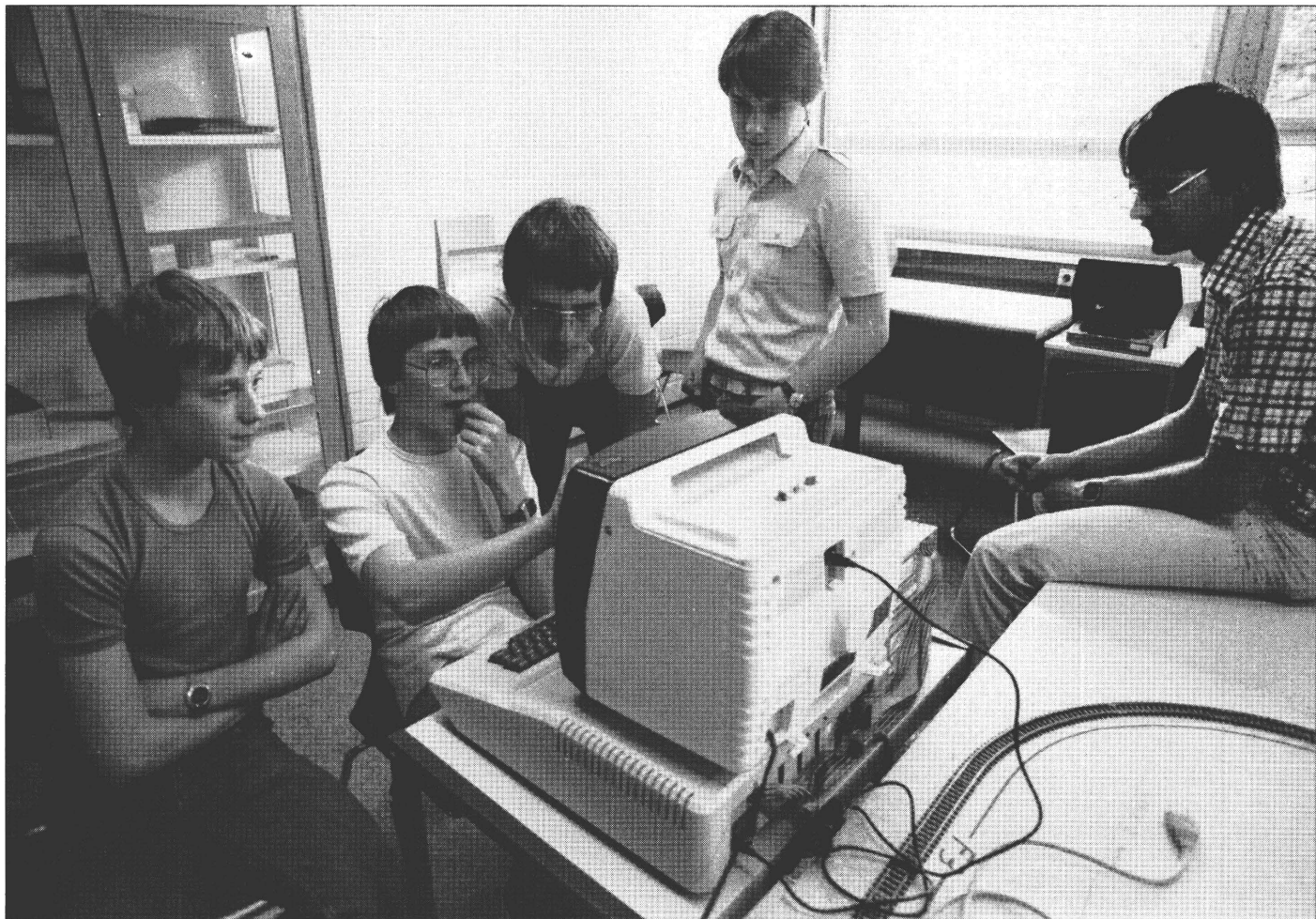
almost any environment and simultaneously with books.

New media may act as a complement in a few cases, but they can scarcely replace written material.

A completely different view must be taken of the involvement of public radio and television programmes. However, they are important less for their ability to impart knowledge which is less successfully portrayed by other methods than for their promotional effect. In this respect, an independent 'education channel' might be an advantage. Video cassettes sent to the individual do not, of course, have this promotional effect. Public television broadcasts and video cassettes therefore differ very substantially in value.

## Distance studies and increased participation in education

Like participation in any form of continuing training, participation in distance stud-





ies depends in many respects on basic education and the level achieved. The rise in the average level of education in the population has been accompanied by a greater ability to cope with distance-study material, meaning above all the individual's ability to organize his own learning process.

A higher level of education results in a wider range of educational interests. But the resulting demand can only be satisfied if the educational opportunities provided are able to meet individual needs and desires. Not every subject will attract a sufficiently large number of people to warrant the employment of a teacher at every institute of adult education.

Both the higher level of general education and the wider range of educational interests increase the need for the provision of an individualized range of educational opportunities. It is here that distance studies may play an important part.

### **Distance studies between formal and informal education**

The above comments were designed to show on the one hand that distance studies can be

effective in the traditional area of general and vocational education and to this extent may also have an important role to play in the acquisition of generally recognized certificates. On the other hand, distance studies enable people to acquire a knowledge of subjects which have not yet been included in the curricula of public institutes of education.

An obstacle to the expansion of distance studies in this latter sector of the education system, for which they are particularly suitable, is, however, the growing institutionalization of education and careers. With increasing frequency those who perform certain activities or have reached certain levels in the salary scale are expected to have specific formal certificates of education.

On the other hand, it must be possible to react to changes in work requirements by employing workers with the right qualifications, even if they have been acquired by unconventional means. In future the employment system must therefore take greater account of types of education which do not comply with preconceived ideas on qualifications. Only then will it be as flexi-

ble and receptive to new developments as it ought to be.

### **Summary**

The growth of leisure time and the scepticism about labour market forecasts and standardized courses of education form a sound basis for an increase in the importance attached to distance studies in continuing vocational training. The greater scope – compared to other forms of continuing training – they leave the participant in the learning process as regards, for example, the time he devotes to learning, the intensity with which he learns and also where he learns, mean that distance studies are a suitable vehicle for satisfying the demand for training among very disparate groups of people. Distance studies are therefore an educational instrument for a varied society.

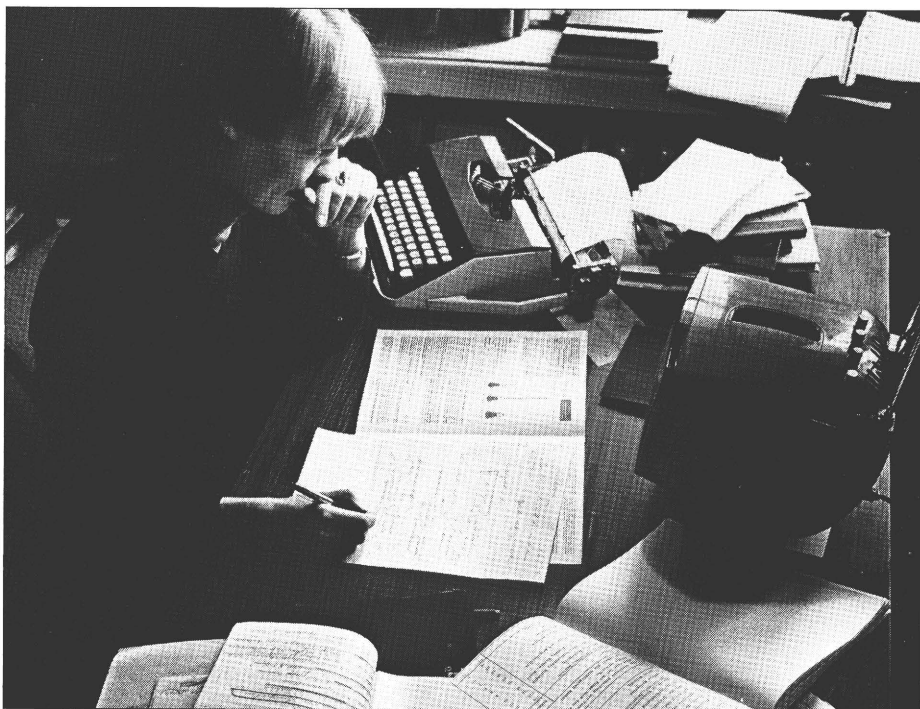
However, distance studies also have an important role to play as an indirect aid in the daily work process or the household: they obviate the need to travel to a place of learning, and knowledge can be acquired



where it is to be used. In this respect, distance studies may be more practical than all other forms of continuing training.

The increase in the school-leaving age enables more and more people to organize their subsequent learning process themselves since, apart from anything else, they have learnt to learn. This acquired skill is not only seen by most people as something they can use or not as they see fit: for increasing numbers the ability to assume responsibility for their own continuing training results in their wanting to seize this opportunity and to free themselves of outside interference in their learning process. Continuing training after all leads not least to emancipation, greater self-determination and the acceptance of greater responsibility for one's own actions. The teaching method must also conform to these goals of continuing training.

There are many signs that these goals are more likely to be achieved with distance studies than in other ways.



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# The role of the media

in the cultural and vocational advancement of the individual

*P. Debaty*

*The culture of a community at any given moment is made up of a constantly interacting set of values and techniques. Those techniques include the media, which have been developing considerably since the late 1940s. For example, at a time when independent and public sector broadcasting stations are proliferating and are using cable and worldwide means of communication, television plays a vital role in modifying values. This role is evidenced at various levels:*

■ *in information, which may be made less objective by the means used to convey the message intelligibly and by the influence of opinions and commercial aims;*

■ *in education, with the introduction of audiovisual methods into schools and with the direct and indirect contribution made by television towards learning;*

■ *in vocational training (the complement to information), where television contributes towards new forms of adult training;*

■ *in the formation of attitudes, a fundamental role in that it affects values and determines overall cultural assessments.*

The culture of the members of a community is an amalgam of the set of values held dear in a society at any given moment and the techniques used to sustain, promote and express those values. There is a constant interaction between those values and techniques: some of the values give rise to innovation, invention and technological change while, in turn, new techniques modify the scale of values.

The birth of television between 1945 and 1948 is a good example of this process.

Seventy years ago, the image of authority – the head of the State – in the eyes of a peasant from the provincial backwoods would be the portrait hanging on the school wall side by side with the crucifix. Today that image is derived from the small screen, which may reveal the head of the State as someone tripping as he walks down an airplane steps like any common mortal, or someone scratching his chin as he listens to a speech. The broadcasting of parliamentary debates is another example. It has certainly not improved the image of democracy in the eyes of the ordinary citizen.

Some of the values held dear in a culture are constant: the idea of a spiritual or worldly authority, the ideal of solidarity and belonging to a social group, the closest being the family, and the concept of a hierarchy within the community based on the notion of power – physical power, the power of

intelligence, inherited power and above all the power of money in all its forms.

The power of money is obviously linked with concept of property, inheritance and class; since the industrial revolution, it has also been linked with that of earnings and, as a result, with the hierarchy of the working world.

In the rigid society of times long past, membership of a trade was passed down from father to son, and the member of that trade would guard his inheritance jealously. Culture (with a capital C) was the province of a privileged few who had the leisure to disregard the problems of day-to-day existence and spend their time on fluid values such as truth, beauty and posterity.

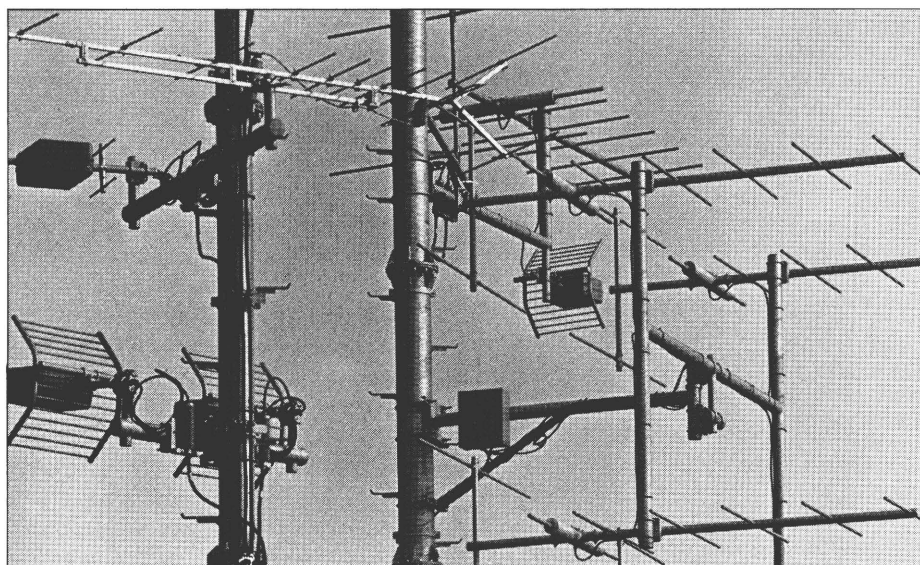
At the same time, new discoveries and inventions were disrupting custom and habit. With the arrival of schools of realism, a growing number of people disregarded the old deterministic ideas and moved up the social ladder, gaining access to power through their knowledge and expertise.

A new value then came into being: the diploma. Paper qualifications are still seen as a value, although their proliferation has deprived them of some of the privileges they confer.

One of the earliest techniques to disrupt values was undoubtedly the printing press and the technological developments to

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which it was to lead, including linotype and photoengraving.

The press is a medium for conveying information and opinion to a whole community simultaneously and with immediacy: the press can be owned by a handful of citizens who can use it to reinforce their power.

The mass media have played a formidable role in the creation, choice and development of values, including the advancement of culture.

Other techniques – competing or complementary – have made their appearance. Radio and above all television have exceeded everything that went before because of their scope for production.

I shall concentrate on television, for two reasons:

■ through my professional contacts and research work as a social psychologist, since 1963 I have been privileged to take part in experiments, research and productions for the Belgian French-language broadcasting corporation, Radio-télévision Belge Francophone (RTBF).

■ for more than 10 years, Belgium has been the country with the highest density of cable television per square kilometre in Europe. In addition to its national television corporations, one French- and the other Dutch-speaking, sub-regional independent community television stations now cover areas of different size, using private or semi-public television distribution company cable systems.

Partly because of these resources and potential and partly because of its small size,

Belgium can now receive direct transmissions from France (3 channels), Luxembourg and Germany (3 channels), Holland (2 channels) and England (2 channels). Belgian viewers enjoy an experience unique in Europe: access to 13 non-commercial and commercial broadcasting networks and to at least one pluralistic Community regional network.

We shall consider the successive and often combined roles of television in informing and educating the general public, vocational advancement and the formation of public attitudes.



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## □ Television and information

When the gazette became a newspaper, published daily, its foremost, essential role was to provide information. A good newspaper was one that published the latest news, hot off the press, even though that news might date back several weeks. Jules Verne has vividly recounted the adventures of journalists contending for access to the telegraph system so as to send their stories to the other end of the world by the fastest possible route.

All the new inventions capable of transmitting words and even pictures were, however, soon to be superseded by radio and then television broadcasting, giving rise to the crisis in the press. Clearly, news today is not news unless it is given on the same day, or even within two or three hours of its occurrence. The journalist presents facts, figures and events in his own particular style; to 'please' his reader, hearer or viewer, there is a temptation to convey the information in a format which, in extreme cases, may alter its content entirely even though the basic facts are given. The first despatch reporting Napoleon's return to France from exile in Elba ran: 'the tyrant has landed'. By the time he reached Paris, the message was worded: 'His Imperial Majesty has made his entry in the Tuileries'. And both were correct.

There may sometimes be only a subtle difference between information and opin-

ion. In our industrial countries, where television has been institutionalized as the medium for information, the general public simultaneously absorbs the news and the way the presenter feels about that news. Even a picture may be manipulated. The unbalanced editing of newsreel from the agencies may make a piece of information stronger.

Culturally, however, an item of information is essentially of interest if it is well conveyed, if it is made intelligible. A new art has come into being, the art of conveying information spontaneously, since the essence of information is immediacy. It is something of which not everyone is capable. There have been few masters of that art. In a monopolistic television system, information as such no longer arouses as much interest. In others, there may be interest in information but the talent for conveying information has been channelled into publicity – the advertising of commercial products, of course, but also the publicizing of ‘stars’ in fields as varied as show business, sport and politics.

Have we not seen men totally unknown to the general public whose faces, in no time at all, have become familiar through the

offices of compliant journalists having privileged access to the camera?

## □ Television and education

Television is part of the child’s cultural environment. Even babies of less than a year old express their delight at the small screen. Nursery school children have told me how a vertical take-off aircraft works even though the drawings in their satchels were of autumn fruit (this is not a value judgment).

There are always obstacles and mishaps of various kind when established education makes use of a newly introduced technique. Printing took four centuries to reach the schools as a teaching aid, and it soon degenerated into little more than a game.

Before the Second World War the potential of radio was ignored. In the war, the embryonic use of radio techniques by military propaganda was a foretaste of things to come: television and other audiovisual teaching aids. After the war there was a craze for equipment of this kind. Still mouldering in the storerooms of Belgian

schools are film and slide projectors, screens, collections of photographs and pictures of ‘educational’ subjects, followed by more sophisticated equipment such as cameras, cutting tables and video machines. The purpose of all this was to give children and adolescents the taste and motivation for transcribing what they had learned in their formal education into pictures and sound.

Every school system catches up with developments 20 years too late, and it is for this reason that they are approved by parents. We should not confuse the use of audiovisual aids in schools with the role played by television (and its extension, advertising) in the education of young people and adults. It is a subject to which we shall return.

There was a dichotomy between the role played by irresponsible, ingenuous specialists in audiovisual methods and the role of professional educationalists attached to schools radio, the producers of ready-made lessons designed to compensate for the shortcomings in teachers’ physical and intellectual resources. The ingenuous practitioner was a jack-of-all-trades. He dabbled in everything and went beyond school curricula, taboos, inspections, monitoring, inquisitions, dogma and sometimes even the



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law. State television systems tried to direct and channel. Although in theory the 'father was the boss in his own home', in fact he abdicated his traditional role as the educator of his children to television; as far as they were concerned, the father and mother were technically a generation behind their times; what they looked for in television was merely a 'golden oldie' film or a TV spectacular in which ageing presenters sentimentalized over the times of their youth.

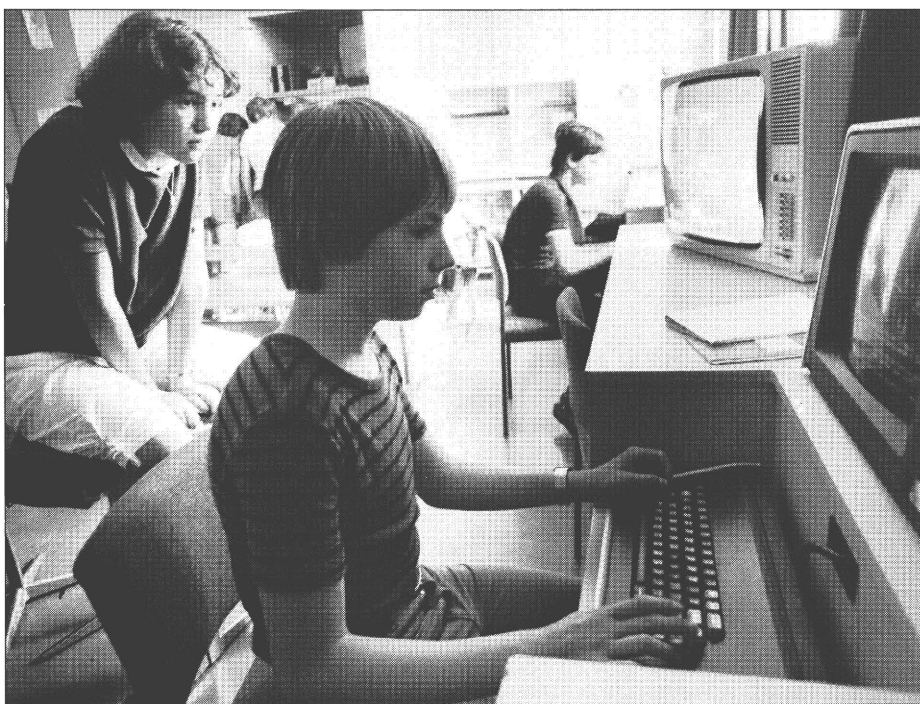
Between 1960 and 1970, Belgian research on the quality of television broadcasts showed that the maximum score (78 %, 'very good') was awarded to a Fernandel comedy film that was old even then, 'Monsieur Jo'. Heaven knows, however, how much time and effort young audiovisual specialists were putting into the production of quality cultural programmes at the same time!

The 1960s foreshadowed happier times for the audiovisual. It was a decade of generous budgets. The Belgian television research body experimented in methods of assessing programme quality, but the immediate outcome was confusion. The question of 'Is it good or is it bad?' became 'do people like it or not?'. Other European television networks were developing the same strategy (in France, England and Germany).

In Eastern Europe, the position was more cut-and-dried: 'If a programme is selected and put on the air, that is what the viewer wants'.

## □ Television and vocational advancement

In 1984, about 80 % of young Belgians stay on at school until 18, after the minimum school-leaving age (which is to be raised in 1986). This is not a reflection of the quality of educational infrastructures and staff, but rather the result of the economic crisis. A broader section of the age group prefers to remain in the safer (even if less remunerative) institutional environment of the school rather than enter the world of youth unemployment. It was a different picture in times of full employment, when any 15-year-old could find a job with an adequate wage. In this setting, workers' education classes, evening and Sunday courses and 'extracurricular courses' were frequented by an élite who were sought after by employers, not just because of their knowledge and expertise but because they displayed the will to get ahead and make a career for themselves.



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These pre-1970s 'monks' (who would do a full day's work and then study for a couple of hours in the evening for three or four years to obtain a diploma equivalent to a certificate of secondary technical education) were envied for the vocational and social advancement by which their efforts were rewarded.

First came correspondence courses, lengthy and precarious formal educational exchanges regulated by the traditional types of examination board. They were accompanied by schools radio and then schools television.

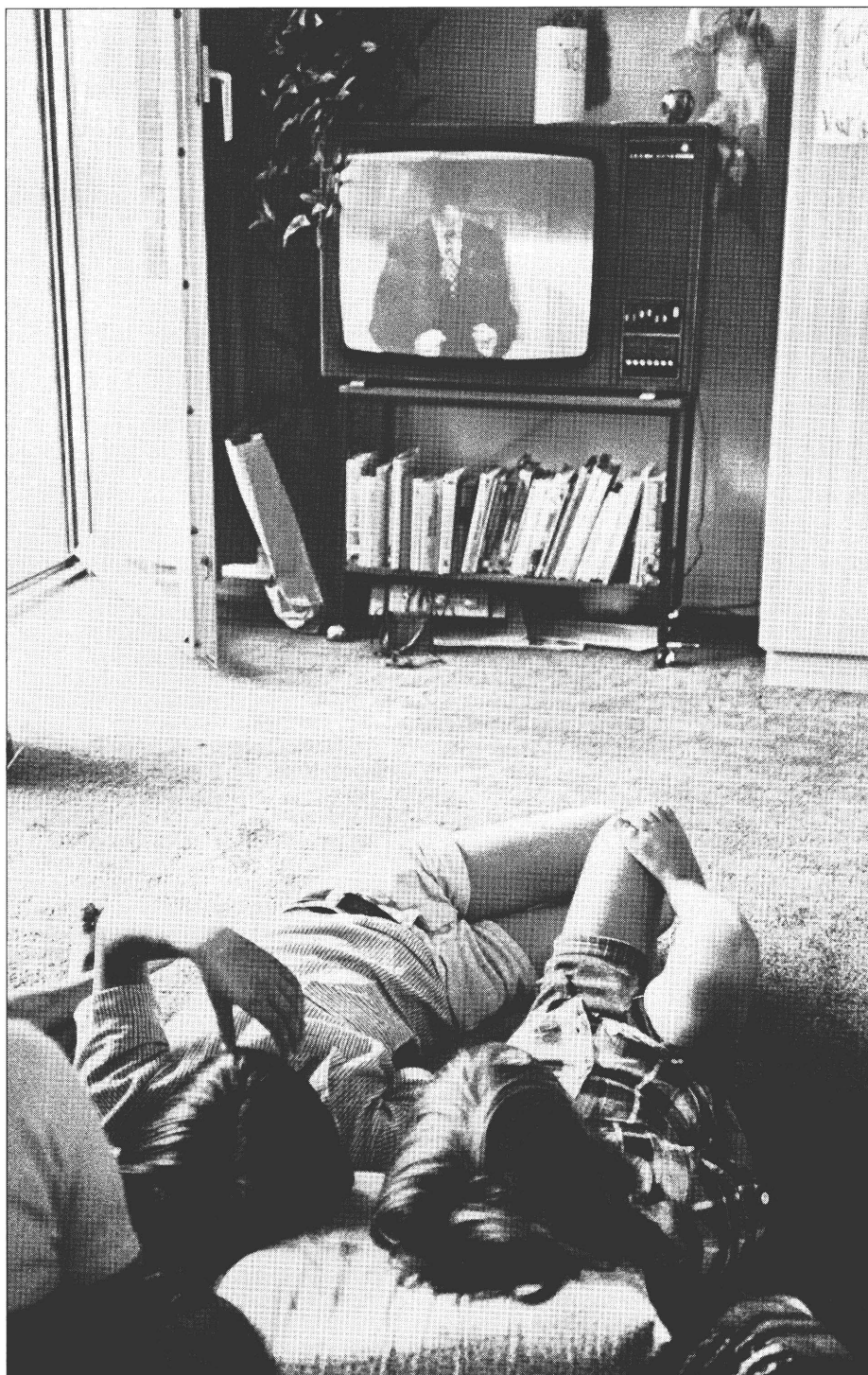
We well remember French television broadcasts on differential and integral calculus that beamed out pictures of graffiti-scrawled blackboards from a Paris University.

The falling birth rate and half-empty classrooms, redundancy in the teaching profession and the opposition of teachers' unions put a stop to this trend. It was a pity for the development of true audiovisual teaching methods! Or more accurately for teaching methods using audiovisuals, for teachers have always used sight and sound in their work of education and training.

We have already hinted at the inadequacy of pre-school curricula in catering for the interests of young children – knowledgeable television viewers whose awareness of the latest developments has been aroused by watching topical programmes.

This is just as true of older children and of boys and girls in secondary and higher education.

In Belgium a number of schemes devised by trade associations and semi-government training agencies (the Office National de l'Emploi – ONEM – and the Office National des Classes Moyennes) took as their target audiences the wage-earners and self-employed wanting to acquire basic or advanced vocational training. From 1972 on, for example, an ONEM-RTBF co-production course on French spelling was tested on 800 'distance learners' (45 30-minute programmes accompanied by course notes). It has been estimated that since that time the number of people reached by the series, over closed circuit television has exceeded 100 000. In 1974, a series of 12 programmes titled 'les Matheux' ('maths buffs'), a refresher course in written mathematics, was less successful. In 1984, on the other hand, two introductory courses on computing, one in French ('Informatix') and the other in Dutch ('the ABC of the computer'), both of which consisted of 12 30-minute programmes, were enormously successful. The fact that 35 000 sets of course notes were sold in the two language communities and more than 10 000 people took part in the practical computer exercises was good evidence of the interest aroused in the general public for this kind of teaching rapport.



## □ Television and the formation of attitudes

An attitude is a disposition to act for or against an object, however important or unimportant. One may be for or against certain ideas, trends, people or systems. One is for or against free enterprise, a given political party, a film director or frozen foods. The role of education could be summed up as the formation and transformation of attitudes. This role is particularly evident in the work of television which, by dint of hammering things home, can in the long run instill the widest range of opinions, especially if it has a *de facto* monopoly within the community. 'Cultural' products are particularly insidious in this respect. Although records, books, magazines and newspapers, the theatre and cinema have a very direct impact on attitudes, they are assumed to be neutral and their dissemination receives the backing of television.

I have seen the same extract from a new film just about to be shown in the cinemas, packaged together with an interview with the director and its leading stars, being shown on all three French channels as well as the Belgian French-speaking channel, all in one week.

The film extract put over the essential message of sex and violence, designed to attract the attention of televiewers. In other words, this was advertising although it was not in the spots earmarked for advertising. And what about the songs, books, authors and actors selected for receiving the star treatment!

The powers-that-be who are concerned with objectivity (which is not always consistent) have made the running of television so bureaucratic that more and more space in programme scheduling is being allocated to packaged commercial products (American soap operas), while pure educational and information programmes are relegated to low-audience times such as the late evening, mornings, Saturdays or Sunday mornings. We shall have good reason to be concerned about the role of television if the public is to acquire its attitudes from 'Dallas', 'Dynasty' and similar productions.

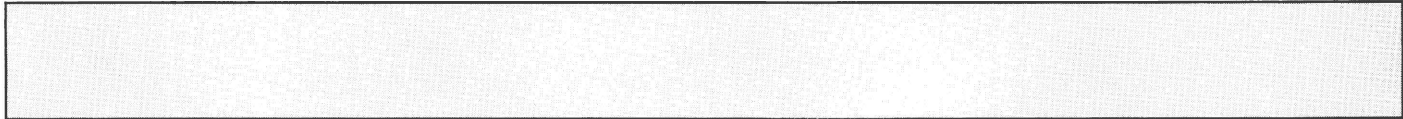
We have had to restrict our discussion, as our subject is so vast. We have chosen television from among the media that convey culture because, in the way it is used by various social forces, directly and indirectly it is the financial power with the most forceful impact on the public at large. Nevertheless, young people are starting to react, one sign being the proliferation of

Even so, efforts are piecemeal, not institutionalized like the Open University. When they can be put on the air depends on the goodwill of TV programme schedulers. Cable-based community television networks, on the other hand, display a good deal of interest in this kind of teaching/learning. In Liège and Namur, several

hundred jobseekers are currently taking a basic course by television, meeting once a week for practical work under the guidance of specialist instructors.

Nevertheless, we are still very far from mass vocational advancement as an integrated part of a consistent, overall plan.

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independent radio stations. Radio is the medium that calls for the least financial resources, but there is no reason why changes should not take place in television as well – indeed, this should be facilitated by cable TV.

The media – press, radio and television – are deploying increasingly sophisticated

techniques calling for more highly trained and skilled specialists. Journalists write directly for the screen, while radio and television broadcast direct via satellites. But are these new hierarchies really improving man's status in terms of values?

We have not discussed the oldest techniques, reading and writing. Perhaps we

should have restored them to their rightful place at the top of the list of communications media, for they are the best conveyors of values, the vehicles of thought, in a world where illiterates are still in the majority and where, even in our industrialized world, the focus of the home is the television set and it is switched on every day by an audience of whom 5 % can neither read nor write.



# What the Council of Europe has done for the development of distance studies in Europe

Michael Vorbeck

During the 1970s, when educational technology took an unprecedented upturn and the idea of permanent education was emphasized in every debate on education policy, the Council of Europe made a fundamental contribution to the development of distance studies in Europe. Even in the late 1960s the Council for Cultural Cooperation of the Council of Europe had begun to realize how important distance studies, particularly if multi-media systems were used, would become as a means of meeting the growing demand for university education and the widespread need for continuing training in vocational education and at work. It was imperative that young people should be given the opportunity of acquiring additional qualification, the educational reserves should be tapped, that overcrowding in the universities should be reduced, that opportunities should be created for women who had discontinued their studies to have children and that retraining through the acquisition of new qualifications should be encouraged.

The Council of Europe wanted to provide food for thought on the subject of distance studies, to make suggestions, to give wide publicity to successful experiments and developments, to encourage cooperation among the relevant agencies at national level, to develop a network of transfrontier contacts and even, if at all possible, to create a European institution for distance studies. With the exception of this last plan, its activities have been successful.

The instruments used for this purpose were many and varied:

- the Council for Cultural Cooperation with its standing committees (Committee for Higher Education and Research, Committee for General and Technical Educa-

tion, Committee for Out-of-School Education and Cultural Development);

- two steering groups (one on educational technology and one on permanent education);

- various groups of experts, which met on several occasions (Working Party on a European Inter-University Institute for the Development of Multi-Media Distance Study Systems, Steering Group on New Types of Out-of-School Education, etc.).

These committees and groups remained in existence until the mid-1970s. In 1978 the Committee for Higher Education and Research was replaced with the Standing Conference on University Problems, which has also continued to investigate the problems connected with distance studies.

Activities undertaken in the various sectors at that time can be described as follows:

## School education

The discussions in the Committee for General and Technical Education and at the conferences held at its suggestion concerned new educational media and audio-visual aids rather than distance studies in the true sense of the term, since the question of distance studies does not arise, of course, until compulsory education has been completed (exceptions being sick children and children abroad). As regards the numerous distance-study courses with a vocational content offered to young people after they have left school, the committee was naturally interested in how the quality and respectability of private distance-study institutions could be ensured and how students and parents could be protected against exploitation. The recommendation made at a conference organized by the Council of Europe in Bad Godesberg and Berlin in September 1972 on the integration of dis-

tance studies into the education system that each country should set up an agency to advise on and monitor distance studies was welcomed and was followed by the creation of an agency of this kind in the Federal Republic of Germany.

## University education

In 1969 the Committee for Higher Education and Research turned its attention to new media and multi-media distance-study systems, e.g. courses during which the student goes through written material at home, listens to the radio, watches television programmes, listens to cassettes or makes recordings and returns them, etc. The need for a minimum of personal contact with a teacher even in distance studies was repeatedly stressed in this context.

From 1971 to 1974 the Committee on Higher Education and Research and the meetings of experts held at its instigation considered case studies on distance studies in a number of countries, e.g. France (cooperation among the universities in eastern France in the provision of distance studies), the Federal Republic of Germany (the German Institute for Distance Studies in Tübingen and later the Open University in Hagen), Ireland, the Netherlands, Poland (the Open Technical University of Warsaw), Spain (Universidad a Distancia), Turkey and the United Kingdom (Open University). A synopsis of developments in Europe by Robert Lefranc appeared in 1974 in a book entitled *The combined use of radiotelevision and correspondence courses in higher education*.

In 1971, J. L. Jankovic had drawn up a detailed report for the Council for Cultural Cooperation on the possible use of satellites in university education and the need to take prompt action to ensure the necessary fre-

DR MICHAEL VORBECK, Head of the Section for Educational Research and Documentation.

quencies were available ('The requirements of European higher education for communication satellite services and frequency band allocations'.) The idea here was that satellites might help to introduce international distance studies and pan-European adult education programmes. The Council of Europe asked the International Telecommunication Union at this time to bear in mind the future need for frequencies for educational programmes.

A number of symposia were held to discuss television in university education and distance studies:

- closed-circuit television in higher education, Padua 1969;
- the place of the audiovisual centre in the university, Utrecht 1971;
- the reform and planning of higher education, Oxford 1974;
- inter-university cooperation in distance studies, Dijon 1974;
- the student in distance-study systems, Tübingen 1975;
- the role and importance of the new communication technologies in post-secondary education, Strasbourg 1979.

At all these symposia emphasis was placed on the importance of cooperation among academics in various fields and from various universities in the preparation of distance-study units. The need for new teaching and learning methods in view of the special features of those taking distance-study courses (older and, in many cases, working people) was also stressed.

At the suggestion of the Parliamentary Assembly of the Council of Europe (Recommendation 650/1971) the Committee for Higher Education and Research also considered the idea of establishing a European Tele-University. However, it very soon became clear that the time was not yet ripe for a project of this kind. The 23 countries that had by then joined the Council for Cultural Cooperation would have had to agree on the contents of distance-study courses and the mutual recognition of certificates and diplomas, and there seemed to be no prospect of that. It was therefore proposed that instead a European Inter-University Institute for the Development of Multi-media Distance-Study Systems should be established to organize meetings and advanced training courses, to collect

material from all over Europe, to pass on information and know-how, to provide technical assistance and to coordinate research or even undertake research itself. After lengthy preparatory work the Council for Cultural Cooperation declared itself in favour of an institute of this kind in 1973. The Committee of Ministers found the proposal interesting and called for further investigations, particularly into the question of financing and location. As a satisfactory agreement could not be reached on a site (Florence, Tübingen or Bletchley in England) or financing, the idea was not pursued further. The abovementioned symposium in Strasbourg in 1979 on new communication methods did, however, again emphasize the need for institutionalized cooperation in distance studies in Europe. A 'European network in the field of multi-media methods' was discussed. In fact, the British Open University now performs some of the tasks that were once to have been assigned to a European institute.

The main contribution the efforts in the field of higher education described above made was that they initiated close cooperation among the various distance-study institutions in Europe long before the European Communities hit upon the plan in their education policy.

## Adult education

As most of the people who take distance-study courses are adults, the activities of the Council of Europe have largely been concentrated on this area. Numerous meetings of experts and studies have been devoted to questions connected with multi-media distance-study systems, with the emphasis on the learning of foreign languages as a means of improving European understanding and facilitating freedom of movement across frontiers. This is particularly important at a time of rising unemployment. The above-mentioned bodies attempted to create a European system of distance-study units, to be jointly produced and mutually recognized wherever possible ('unit credits').

The situation in the various countries was carefully examined, and the knowledge acquired was evaluated. Here again, how-

ever, reaching binding agreements on contents and diplomas proved difficult. But a certain level of cooperation among producers was achieved. The television English course 'Follow Me', which was well received throughout the world, is an example of such cooperation.

## Cultural policy

The importance of television and the new media for culture in the narrower sense was also stressed at meetings of experts and in studies, but distance studies in the formal sense were seldom discussed in this context. Adult education programmes on culture do not as a rule form part of distance-study systems, although there are exceptions.

## Documentation and information

Even though distance studies are no longer a focal point in the programme of activities undertaken by the Council of Europe, interest in this subject has by no means waned.

The Documentation Centre for Education in Europe holds over 18 000 books and 300 journals and also a great deal of 'grey literature', much of which concerns problems connected with distance studies. The centre is open to everyone.

The magazine 'News-Letter/Faits Nouveaux' published by the centre five times a year, which reports on interesting advances in education, frequently contains articles on new developments in distance studies. Address: Council of Europe, DECS 6, BP 431 R 6, F-67006 Strasbourg-Cedex.

The Council of Europe also maintains a European Documentation and Information System for Education, (EUDISED), whose data bank – stored on computer but also available in magazine form – contains descriptions of educational research projects, some of which concern distance studies.

Distance studies are still an important area, in which the Council of Europe should continue to take an interest.

## Methods of financing vocational training in the European Community

*B. Sellin*

The articles included in this 'file' on the methods used to finance vocational training in the Member States of the European Community were requested to enable a brief description to be given of the various financing mechanisms and instruments and of the total costs and resources involved, both in absolute terms and related to such sub-systems as initial training, continuing training, etc. and to the organizations providing training. A simple diagram is included to summarize the articles.

The authors have largely confined themselves to providing the information requested. Those familiar with the vocational training systems in the various countries are unlikely to find anything new in this information, but it will be new to outsiders less familiar with the mechanisms and approaches adopted by the Member States. Experts are also likely to find the descriptions of other countries' systems interesting. Even this 'snapshot', which ignores major developments — demographic trends, for example, in cost-inducing items and their significance over a given period — will help to clarify a number of points.

Although employers' contributions to the cost of vocational and continuing training differ from one country to another, they do at least contribute everywhere. Even in France, where most vocational training is provided by schools or the authorities, employers play an important part, albeit far more in continuing vocational training than in the initial training of young people.

The situation is similar in the United Kingdom, where employers are again more involved in the continuing training of skilled workers, with or without the participation of such intermediary training bodies as the industry training boards, skill centres and intercompany training centres.

In both France and Britain a major part is played by intermediary training centres and

organizing bodies: not only non-profit-making institutions but also para-Statal organizations and training facilities run by joint training boards are very important. Many of them are funded not from one source (the government or private firms) but from a wide variety of sources (foundations, chambers of trade and industry, joint funds, donations, members of associations, private contributions and fees charged for training and services). Some provide training for whole sectors of the economy, while others confine their activities to specific regions, localities or even training centres.

Training centres run on purely commercial lines are a rarity. In one way or another, most receive government grants or grants from funds made up of levies.

In contrast with the two countries so far mentioned, firms in the Federal Republic of Germany are highly active not only in continuing training but above all in the initial vocational training of young people. As a result, they contribute a larger share of the total cost of financing and assisting vocational training than the government. The article on the Federal Republic, however, merely touches on the subject of continuing training. To complete the picture, reference must be made to the financial efforts of the Federal Institute of Labour, which is largely financed from employers' and employees' contributions, in the area of continuing vocational training and to spending by the Federal *Länder*.

In recent years public spending has tended to account for a larger share of the total than private spending.

As part of its study of the financing of vocational training (especially that designed for young people up to the age of 25, from Secondary Level II upwards), Cedefop is comparing the financing mechanisms, in-

struments and budgets of the Member States with a view to improving the transparency of their systems.

It is already becoming clear, however, that it will be far from easy to achieve this objective, modest though it is, because of the lack of transparency in the Member States themselves. As a clear distinction cannot be made between initial and continuing vocational training and general education or between such training and practical experience and on-the-job training, a study of cost factors meets with fundamental problems when it comes to considering out-of-school or intermediary training activities. Expenditure can admittedly be deduced with a fair degree of accuracy from staff costs, training allowances and the cost of equipment, provided that the staff and trainees are involved only in training and that the training does not constitute a gainful activity. At intermediary centres and during in-company training, however, both the training staff and the trainees are engaged in gainful activities. The dividing in such cases is bound to be unclear, and in the final analysis each case must be taken on its merits.

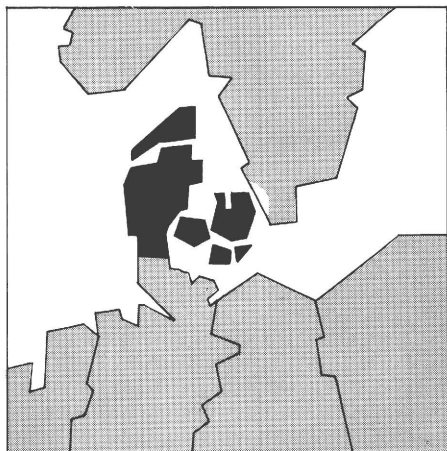
As the problem of unemployment among both young people and adults grows, public bodies are resorting with increasing frequency to financing and assisting the training provided by firms in the hope of facilitating the integration or reintegration of the unemployed. Where the control mechanisms at local and/or company level operate satisfactorily, resources are likely to be used for training. But in many cases there are no such mechanisms, or they are inadequate: examples can be found in all the Member States. The danger then is that monies intended for training are indirectly channelled into firms' production activities.

If all young people are to be offered initial vocational training, in schools or in alter-

nance form, as the Council of Ministers decided in 1983 (see the Council resolution of 11 June 1983 on vocational training policy in the European Community in the 1980s), it will be essential to examine and

improve training structures and distribution mechanisms so that more effective use may be made of the scarce resources available. Total spending on vocational training is immense, but the allocation of resources

among target groups and the quality of the training provided still leave a great deal to be desired. The study Cedefop has begun may help to show how these structures and mechanisms can be improved.



# In Denmark

*W. Rasmussen*

## What are vocational training courses?

The purpose of vocational training courses is to develop (i) attitudes, (ii) working habits, (iii) understanding and (iv) skills with a view to increasing the chances of young people obtaining regular employment and income.

An improvement in attitudes and in working habits, with beneficial effects, can take place even in primary school and lower secondary school. In addition, there is the effect of participating in the instruction given at the optional local-authority school for 14-18-year-olds, or at continuation schools or youth colleges.

But added to these influences, there has been a considerable extension in Denmark of efforts to prepare the young people for gainful employment, with the aim of achieving, as far as possible, preparation of all young persons who have left school for employment within the community.

Many of the innovatory steps taken in recent years to combat youth unemployment have been directed towards the improvement of attitudes and working habits in preparation for actual vocational training. These special measures for young unemployed persons are put into operation in Denmark by the county-borough or borough authorities as employment projects or combined instructional and production programmes.

In what follows we shall discuss vocational training courses only in the narrower sense. These are training courses which are attended primarily by young persons who are to be employed on the labour market,

i.e. in private and public production, distribution and administration. The term 'vocational training courses' also embraces further training of the young persons concerned, however.

## Apprenticeship training courses

Apprenticeship training courses have existed for several hundred years. However, they have been reorganized, with greater importance attached to instruction given at the vocational schools, and now they take the form of alternance training, with alternating stages of on-job training in firms and attendance at vocational schools, where the apprentices receive both theoretical instruction and practical trade training in school workshops. Before the training as a whole begins, a training contract approved by the employment offices has to be drawn up.

## Basic vocational training (bvt)

Basic vocational training has come into existence only in recent years, with the courses starting around 1970 as an experiment; but now they take place in pursuance of a law of 1977. The first part of bvt takes the form of one year's instruction at vocational school, where the students receive both theoretical instruction and practical trade training in the school's workshops. The students then start on-job training with a company, before which a training contract has to be drawn up with a company which can undertake the practical training; the training can then be carried out in the form of alternance training, as in the apprenticeship training courses.

## Labour-market training courses

Young persons over 18 years of age who are not under apprenticeship training or basic vocational training have an opportunity to attend courses held at the schools for semi-skilled workers. In addition, they can attend job-induction courses, which are also held at the semi-skilled workers schools.

### Further training

There are two main forms of further training:

☐ Further training of unskilled workers.

This further training takes place mainly at the semi-skilled workers schools.

☐ Further training of skilled workers and office personnel.

This further training takes place mainly at the same vocational schools at which the basic training courses for apprentices and the basic vocational training courses are held – i.e. at technical schools and commercial schools.

## The population trend

In the course of recent years, there has been a sharp fall in the birth-rate in Denmark, the effects of which can be observed in the primary and lower secondary schools, with a fall in the school population from 716 000 in 1981, through 647 000 in 1986, to 563 000 in 1991. Thus, within a few years' time there will be far fewer people enrolling for the vocational training courses; but until the peak is reached in 1987 there will be very



heavy pressure of student-numbers, and this is very important for current thinking on training policy.

See Figure 1.

A growth in the number of bvt students in the base year to a maximum in 1982/83 is predicted, followed by a slight fall in the ensuing years.

For the apprenticeship training courses, there was a minimum in 1980/81, then a rise to 1983/84, followed by a slightly falling trend.

See Figure 2.

This figure shows, for recent years, a very sharp rise in both curves, namely semi-skilled worker training courses and further training of skilled workers.

## Finance

Expenses are incurred with the vocational training courses – i.e. apprenticeship training courses and bvt training courses – in living expenses for apprentices and students and the cost of their on-job training in companies and, finally, the expenses for the schools (technical schools and commercial schools).

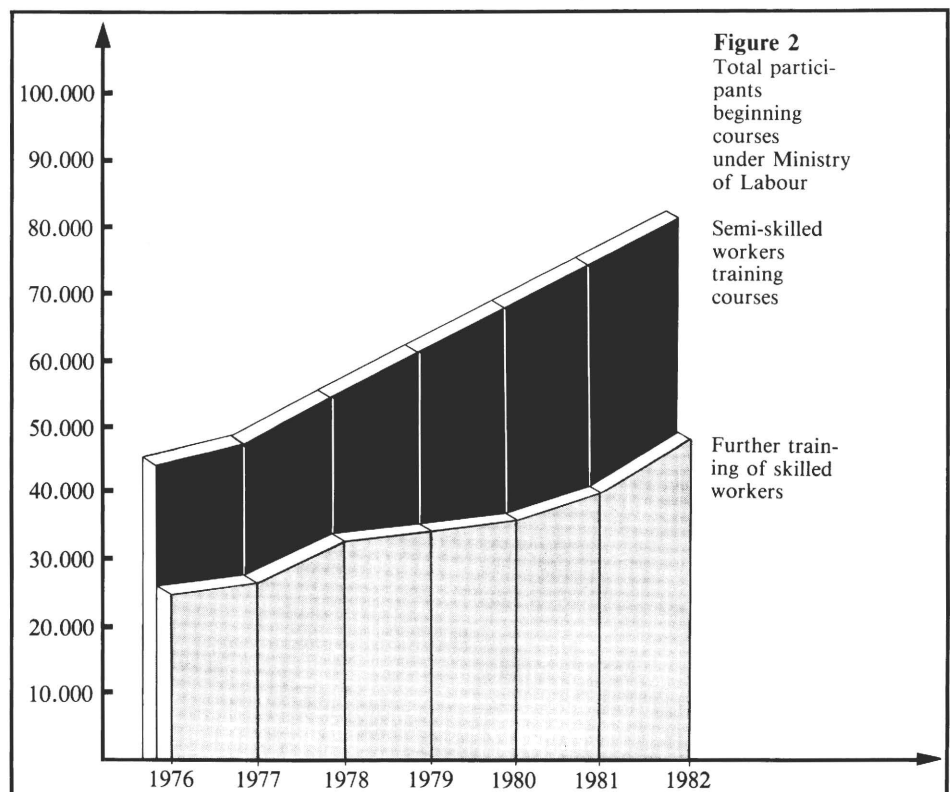
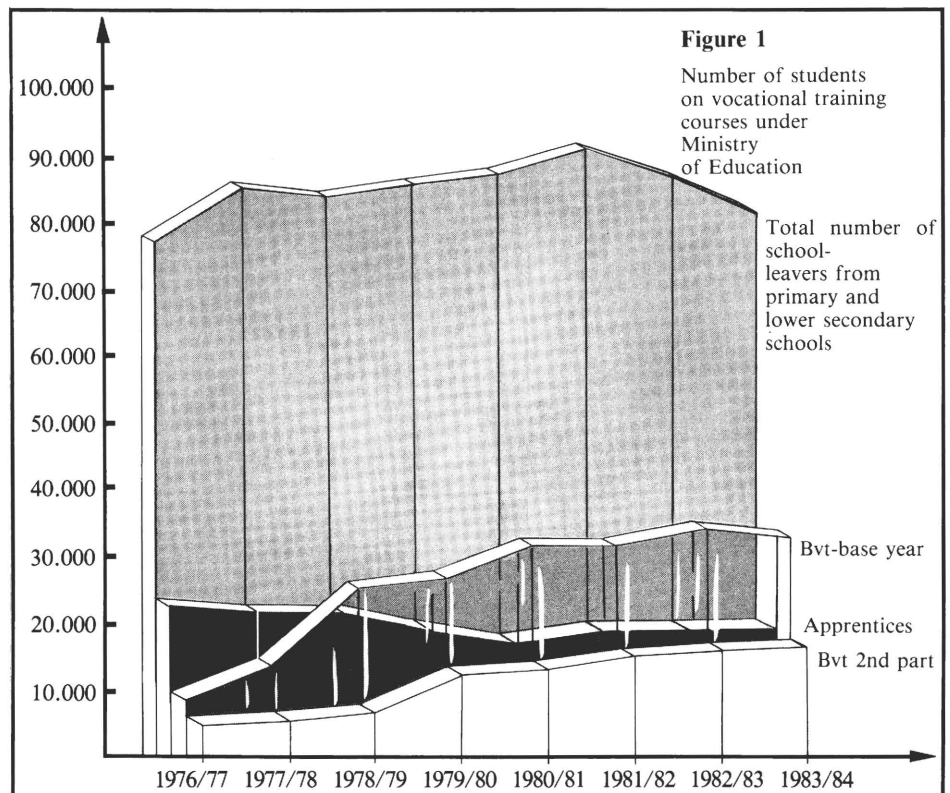
The firms pay wages to the apprentices and to the bvt students in the second part – i.e. when they are admitted for continued training in the forms of alternance training after the base year. During the training in the base year, bvt students do not receive wages; they may get only a training grant, possibly – in line with what pupils in the ordinary upper secondary school can get.

Apprentices' wages and the wages for bvt students on the second part of the course have in recent years been rising more sharply than wages for adult, trained workers.

## The AER Fund

A scheme for refunding some of the firms' expenses has been introduced, based upon a Law of 1 July 1977 concerning reimbursement of employers for students-in-training. The object of the scheme is to refund to the employer all or part of the wages paid out to apprentices or bvt students during their school attendance.

The scheme is financed with contributions from all the private employers, the contribution required being fixed in proportion to



the total number of employees in the individual firm. The scheme embraces all private employers who both finance the scheme and are reimbursed from the fund.

The scheme is administered by ATP (Arbejdsmarkedets Tillægspension – Labour Market Supplementary Pension), which is an independent, private institution, man-

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aged by a committee composed of the two sides of industry. The rates of contribution are fixed annually by the minister for education, on the recommendation of a special committee for AER. In 1983, total income from contributions amounted to about DKR 412 million, collected quarterly from 113 000 employers. In the current year, 1984, the contribution rate amounted to DKR 432 for every all-year-round employee.

Refunds are paid out to all private employers who have apprentices or bvt students, monthly. With effect from July 1983, the rate of reimbursement has been DKR 480 weekly for 1st-year apprentices and DKR 850 for bvt students and 2nd-year apprentices. In 1983, refunds amounting to a total of DKR 384 million were paid out to 26 900 employers for about 61 600 apprentices and bvt students.

## Expenses of running the schools

The operating expenses of the schools for apprentices and bvt students – technical

schools and commercial schools – are paid by the Exchequer, through the Ministry of Education. Expenditure for 1984 amounts to about DKR 2 000 million. School fees used to be paid; but these covered only about 15–20 % of the expenditure and the system has been discontinued completely.

A rather similar system has been in operation for the semi-skilled workers schools, where the expenses are paid by the Exchequer through the Ministry of Labour.

## The AUD Fund

As a new arrangement which came into force on 1 April 1984, a scheme has been introduced for funding the expenses of the labour-market training courses under the Ministry of Labour. These are the five following training courses: (i) the semi-skilled workers training course, (ii) re-training of unskilled workers, (iii) induction courses for young persons, (iv) further training of skilled workers and office personnel and (v) induction courses for the long-term unemployed.

Contributions have to be paid into the fund for all paid employees who have a working week of at least 10 hours with the same employer, or who are employed as casual labour. The contribution is graduated according to the degree of employment, but not according to the level of pay. The highest contribution has to be paid for employment for 130 hours or more monthly. Employer and employee portions of the contribution are equal; in 1984 the combined amount was DKR 27 per week, or DKR 108 per month or DKR 972 per year for a full-time employee. The annual contribution for 1985 is expected to remain unchanged at DKR 972. The employers' contribution is to be regarded as a tax-deductible operating expense and the employees' contribution is tax deductible from taxable income.

ATP is in charge of collection of the contribution, as for the AER Fund. The funds are transferred to the training fund and the financial consequences of this arrangement are that Government finances are relieved of an item of expenditure which for 1984 amounts to about DKR 1 500 million.



## In France

*Ph. Méhaut/J. Rose*

When we consider how an educational system is financed we naturally look at the funding agencies and structure and the directions in which funds from the principal sources are channelled; at the same time, however, we must discern the position and role of those management and decision-making structures in which, in practice, the implementation of educational policies is mediated and regulated by social factors. It is all the more important to view the picture from both angles when we turn to the financing of vocational training, in that this is a focal issue for the various social forces which would like to control the ways of producing manpower.

In this article, we shall take 'vocational training' to mean all training, whether for young people or for adults, designed to lead directly to a job provide additional job-related instruction. We are concerned here with different levels of initial training (in secondary education and the shorter cycle higher education), courses that serve as a transition between school and employment (apprenticeship, schemes promoting integration in the working world and schemes for 16–18 year olds, contracts that combine employment with training, etc.) and continuing training for adults, whether or not they are in paid employment.

We shall make a distinction between running costs, the cost of equipment and the cost of staff where the funds are derived from different sources (mainly in public sector financing of initial training). We shall assume that the contribution made by trainees' families amounts to no more than their expenditure on education proper and shall not adopt the broader concept by

including all the expenses incurred for education (transport, supplies, clothing, etc.).

This restrictive definition by necessity minimizes the direct contribution made by families to the financing of vocational training.

We have been able to arrive at an estimate of the main sources of finance for vocational training in 1981. We should point out that this estimate has been derived from information from a number of ministerial sources and includes a margin that cannot be precisely quantified. This applies to apprenticeship tax and, to an even greater extent, the further training provided by companies not subject to the legislation enacted in 1971. For example, it is difficult to obtain reliable figures for expenditure on staff training for local authorities, public establishments and hospitals or on the training of Government officials.

Bearing these reservations in mind, the main sources of funds are:

■ *FF 15 000 million* allocated out of the Education Ministry's budget towards initial vocational training establishments, to which we should add approximately 2 000 million from other ministries (such as Health and Agriculture);

■ *FF 1 500 million* out of the apprenticeship tax (700 million of which is contributed by the Government);

■ *FF 9 200 million* from the public sector budget for continuing vocational training; and

■ *FF 13 200 million* spent by companies.

In the field of initial training (not including apprenticeship), the funds go to higher education establishments (the Institut Universitaire de Technologie – IUT), technical

lycées and vocational education lycées leading to national diplomas. About 80 % of pupils are in State education. The respective share of resources derived from the government, trainees' families and companies varies considerably, depending on the level of training and the status of the establishment. In the case of all establishments providing secondary vocational education, for example, the proportions are 55 %, 25 % and 5 % respectively; the remaining 15 % is almost wholly derived from the establishments' own resources, although some money is contributed by the local authorities.

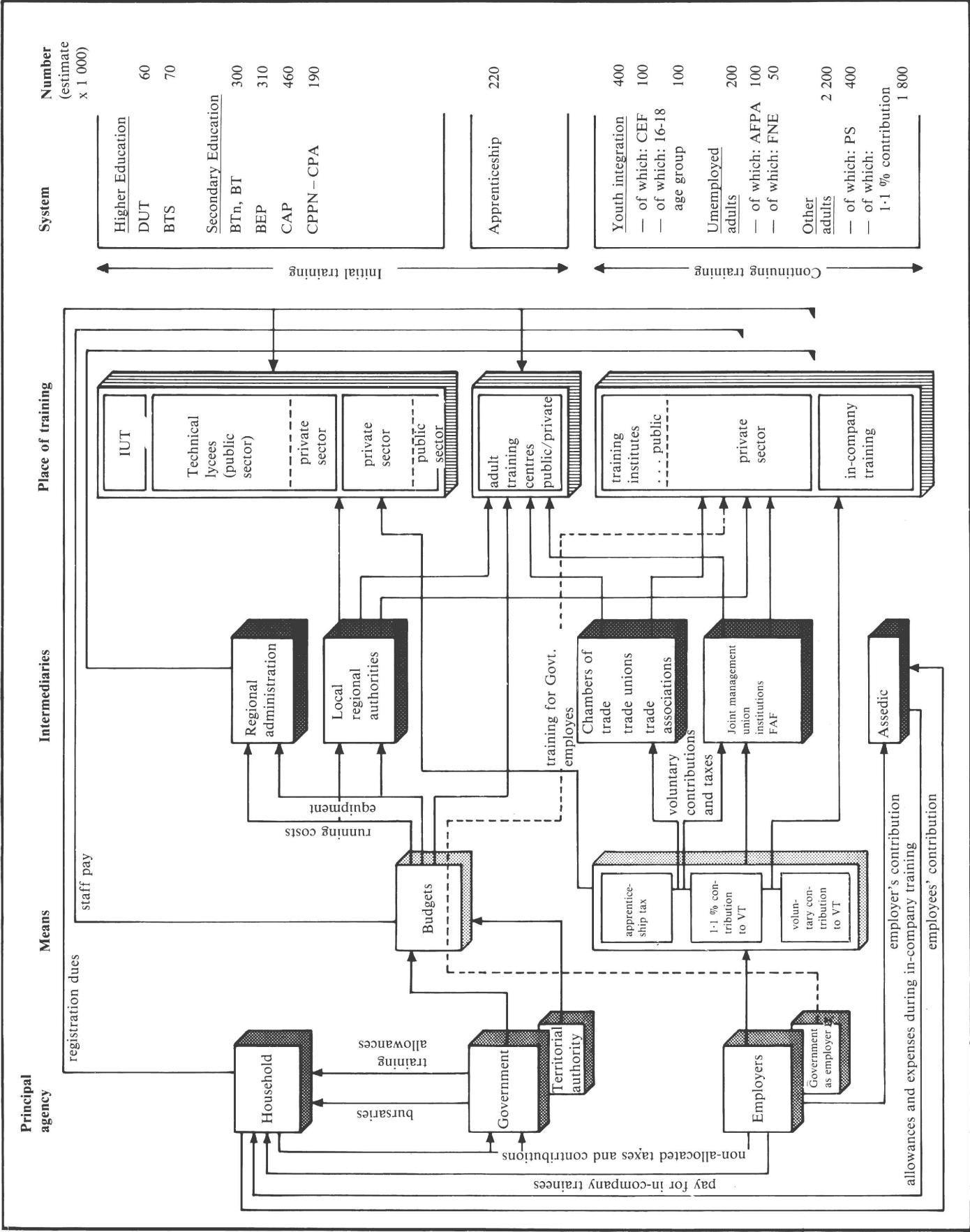
Apprenticeship has its own special structure, with a larger proportion of establishments having private status (40 % set up by chambers of trade, 40 % by private bodies or by companies); more than a third of their resources is derived from the apprenticeship tax paid by employers.

In the field of continuing training, there is a more diversified pattern. The proportion of trainees catered for by public sector training bodies is estimated as less than 30 %. The agencies that provide continuing training derive most of their resources from companies or intermediate agencies; second come the resources contributed by the State, while families contribute only a small portion.

### □ Families

Households finance the government budget in that they pay registration dues to the training establishments (which vary a good deal depending on its status – example, parents pay 30 % of the cost of lycée and college training) and also contribute to the

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Associations pour l'Emploi dans l'Industrie et le Commerce (Associations for Employment in Industry and Commerce – As-sedic). Conversely, families receive bursaries (initial training) and training allowances (continuing training) from the government as well as pay and allowances during in-company training periods (continuing training) from employers and from As-sedics. This counterflow is of particular importance in continuing training, in that it accounts for about 50 % of the total cost of implementing policies in this sphere.

## □ Employers

Employers (and these include the government in its status as an employer as well as private sector companies) make only a very small contribution to the funding of training. In practice, it amounts to no more than the payment of apprenticeship tax (0.5 % of their wage bill, payable by all employers with a work force of more than 10) to training establishments and adult training centres, as well as certain parafiscal taxes in individual sectors of the economy. As an employer, however, the government provides a substantial part of the training for its own future officials, in specialist training schools for each ministry, often as part of its pre-recruitment system. On the other hand, companies are the main sources of financing for the training of people already in paid employment, providing 80 % of the funds. Basically, the funding arises from the parafiscal obligation placed on employers to spend a certain amount on training. Each industrial and commercial concern with more than 10 employees must devote at least 1.1 % of its wage bill to vocational training. This is either spent on the company's own training or passed to outside training establishments under an agreement. Certain levies may be allocated for special purposes (as in the case of the 0.2 % contribution used to support young

job-seekers and, more recently, the 0.1 % levy to finance the taking of leave by individuals for the purpose of education or training) or made over to the Treasury if they are not deployed.

In addition to the compulsory contributions, funds may be given voluntarily by employers, for instance those who are too small to be under an obligation to do so or those who wish to spend more than the threshold of 1.15 %.

This money (covering both wages and training costs) may be administered or deployed by intermediaries. For example, many small and medium-sized companies use the Fonds d'Assurance Formation (training insurance fund) for the purpose, while other joint employer/union bodies and trade organization (chambers of trade) are involved in that they administer (and sometimes even supplement) the funds, using employers' voluntary payments or compulsory levies (for example the levy allocated to individual education leave).

## □ The government

Government funds for vocational training are provided by many ministerial departments. The main source has been the Education Ministry, but a growing proportion is now coming from the ministries responsible for vocational training and employment.

The channels through which funds flow are very varied. As a general rule, the finance for the teaching staff is handled at a national level. The expense of running and equipping training establishments is handled mainly by the regional authority (*rectors*). Since regionalization, this responsibility is being decentralized to an increasing degree, with the regions and local authorities using specific resources transferred to them from the national budget plus a fraction allocated out of their own resources.

Public training establishments are financed directly out of budgets. Public funds are allocated to private establishments that receive official approval, thus ensuring that they satisfy certain administrative and educational requirements. The rules will certainly be amended once the reform of the private education sector comes into force. The approval system is generally applied in the case of apprenticeship.

Government intervention in continuing training is principally directed towards job-seekers. It provides three-quarters of the finance for schemes designed to help young people who are looking for jobs and adults who are unemployed or need to retrain. In general, funds are allocated by machinery for subsidizing approved training schemes, creating a contractual relationship between the authorities and the training institute in question. The only exceptions to the rule are certain types of scheme (evening course social advancement schemes) and institutions such as the Association pour la Formation Professionnelle des Adultes (Association for Adult Vocational Training – AFPA) which are funded by grants from a budget item. The advisory or decision-making bodies in the approvals procedure are tripartite agencies at the level of the geographical departments or the regions (Comité Régional de l'Emploi et de la Formation professionnelle – COREF) or at national level (the management board of the Fonds de la Formation Professionnelle – the Vocational Training Fund).

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## In Greece

*Stavros K. Stavrou*

Various factors, mostly of a politico-ideological nature, resulted in the Greek education system being dominated by the general, classical/humanist type of school education until the fairly recent past. Consequently, it was not until 1959 that the administration was able to pass legislation providing for a relatively comprehensive system of vocational training. Despite the many years of considerable pressure for a modern and efficient range of vocational training to eliminate the country's many socio-economic deficiencies, the government was unable (or unwilling) to follow up this legislative framework promptly and effectively and so close an obvious gap in the education market. The private sector, on the other hand, took the initiative fairly quickly and, a decade or so after the legislation was introduced, had a commanding lead in the field of basic vocational training. This development naturally left its mark on the financing of vocational training, in which the fees paid by trainees initially played an essential role.

### ☐ Trends in basic vocational training

In 1971/72 68 197 pupils, or 60.8% of the total, were enrolled at private vocational schools, whereas only 12.7 % of all pupils in general secondary education (grammar school level) were attending private schools. As the economically weaker section of the population were clearly over-represented among vocational school pupils, a fact revealed by a number of analyses, and as vocational training was noticeably inferior to grammar school education, the weaker

members of society were obviously at a dual – financial and qualitative – disadvantage. Moreover, despite the wider range of training offered by the private sector, it was by no means taken as a model for State vocational schools. The glaring deficiencies of the vocational training system were thus camouflaged and perpetuated rather than progressively removed.

| Ministry   | 1972/73 | 1975/76 | 1980/81 |
|------------|---------|---------|---------|
| Education  | 88.9 %  | 90.6 %  | 85.6 %  |
| Employment | 8.6 %   | 8.3 %   | 10.5 %  |

State contributions towards private school fees did nothing to ease the growing public pressure for the abolition of private schools. The government then began, rather hesitantly at first but later, when secondary education was reformed in 1976 and 1977, with greater vigour, to lay the legislative and other foundations for 'suppressing' the private sector. The ensuing trend is revealed by the figures on this period: private secondary vocational schools accounted for 60.8 % of all pupils in vocational training in 1971/72, as against 48.9 % in 1975/76, 37.2 % in 1978/79 and 14.7 % in 1981/82. (For a better understanding of these figures, it should be added that in 1981/82 108 212 pupils were enrolled at vocational schools, equivalent to 32.7 % of all pupils in secondary education.) This reveals the extremely rapid shift in the financing of basic vocational training from the private to the public sector.

At this juncture, a few comments on the bodies, i.e. ministries, with overall responsibility for vocational training are called for. By far the largest role in this respect has always been played by the Education Ministry, the Employment Ministry's part being far less significant, as is clear from the following figures (in % of all vocational school pupils):

The following remarks on methods of financing will focus on these two ministries not only because they dominate in quantitative terms but also because the other ministries (Merchant Shipping, Social Affairs, Agriculture, etc.) have not developed financing methods of their own. However, the methods used by the Education and Employment Ministries to finance vocational training differ substantially.

### ☐ The Education Ministry

The Education Ministry has two sources for the financing of the state vocational schools for which it is responsible: (a) the 'ordinary budget' and (b) the 'public investment budget' (this distinction is made throughout the government's budget). The first of these sources is used to meet current operating

costs, the cost of school-books, etc., the second to meet the cost of planning, buying land and building and equipping schools. The funds obtained from the two sources are administered separately. As at all levels of education, teaching staff are paid by the government. There are no school fees and books are free, but pupils must pay for board and lodging.

To illustrate the growing financial role played by the Education Ministry in this sector of education, not only has expenditure from the ordinary budget risen from DR 421m in 1976 to DR 6 340m in 1984 (at current prices) but – far more important – this expenditure as a proportion of the Ministry's total budget has grown from 2.6 to 5.8 % in the same period.

The Ministry sets aside a specific amount in its total ordinary budget for secondary-level vocational training and then distributes it among the various schools, most of which are known as 'centres of vocational and technical training' (KETE). The schools then draw up detailed budgets, which they

submit to their prefecture for approval. Once approved, the budget is implemented by the school (see diagram).

The administration of the public investment budget is rather more complicated. It has been modified in recent years to permit geographical decentralization. Formerly (until 1982) the prefectures submitted proposals for projects to the Ministry, which forwarded them – broken down by prefectures and projects – to the Economics Ministry for more or less formal approval. The Education Ministry then assumed responsibility for the implementation of the budget by the various bodies concerned, i.e. the prefectures (outside Athens) and the Organization for the Construction of Schools (OSK) in the Athens prefecture. After a transitional arrangement in 1983, the prefectures and the OSK have been responsible for all proposals, planning and, once the Economic Ministry has given its approval, implementation since the beginning of this financial year. Only in the last phase of this process is an appropriate

communication sent to the Education Ministry for its information (see diagram).

## □ The Employment Ministry

Through the Organization for the Employment of the Labour Force (OAED) the Employment Ministry organizes 'apprenticeships', informal but effective and respected training programmes which in some ways resemble the German 'dual system'. The trainee signs a contract of employment with a firm, which undertakes to train him, and he agrees to attend a vocational school, or 'apprenticeship centre', run by the OAED. The financing of this form of training is by and large 'parafiscal' since the OAED's budget is funded entirely from employers' and employees' contributions, which amount to 3.3 % and 2 % of total wages and salaries respectively. (It should be pointed out that the OAED also funds unemployment benefits and family allowances.)

### The financing of basic vocational training by the Greek Education ministry

#### 1. Ordinary budget

#### P H A S E S

| PROPOSAL  | FINAL DRAFT                 | APPROVAL    | IMPLEMENTATION |
|---|-----------------------------|-------------|----------------|
| Education Ministry<br><br>(distributed among the various schools) | Schools (KETE) <sup>1</sup> | Prefectures | Schools (KETE) |

#### 2. Public investment budget

#### P H A S E S

|                   | PROPOSAL   |   | FINAL DRAFT   |   | APPROVAL   |   | IMPLEMENTATION  |
|-------------------|--|---|---|---|--|---|---|
| <i>up to 1982</i> | Prefectures<br>(broken down into projects)       | → | Education Ministry<br>(broken down into projects and prefectures) | → | Economics Ministry<br>(more or less formal approval)     | → | Prefectures + OSK <sup>2</sup><br>(under the supervision of the Education Ministry) |
| <i>1983</i>       | Prefectures + OSK<br>(broken down into projects) | → | Education Ministry<br>(broken down generally into prefectures)    | → | Economics Ministry                                       | → | Prefectures + OSK<br>(under the supervision of the Education Ministry)              |
| <i>from 1984</i>  |  |   | Prefectures + OSK   |   | Economics Ministry<br>(coordinated with the prefectures) | → | Prefectures + OSK<br>(communications to the Education Ministry)                     |

<sup>1</sup> KETE = Centres of Vocational and Technical Training.

<sup>2</sup> OSK = Organization for the Construction of Schools – in this case, responsible for the Attiki (Athens) prefecture.

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| <i>Up to 18</i>   |                    | <i>Over 18</i>   |
|-------------------|--------------------|--|
| 1st semester 50 % | 4th semester 80 %  | all semesters 100 %<br><br>of the statutory minimum wage |
| 2nd semester 60 % | 5th semester 90 %  |  |
| 3rd semester 70 % | 6th semester 100 % |  |

The OAED finances the construction, equipment and running of the ‘apprenticeship centres’. It also runs hostels and canteens that provide board and lodging for trainees. In a very few cases, the public investment budget is used to finance only the construction of individual buildings. The employers pay their trainees a wage, which is graded (see table):

Trainees are fully insured to cover the cost of any medical attention, drugs or hospital treatment they may need. Since Greece acceded to the European Community,

employers have been able to submit applications, which are forwarded by the Employment Ministry, for a financial contribution from the Community (Social Fund) of 55 % of the training costs they incur.

## ☐ Vocational training for adults

This sector of vocational training, which has obviously been neglected in Greece, is confined to the OAED’s informal pro-

grammes, most of which are implemented at the Centres for the Vocational training of Adults (KEKATE), where unskilled adults are trained in crash courses lasting six or nine months in occupations for which there is a need in the regional labour markets. Some courses are also held in firms, in cooperation with the OAED, the cost being roughly shared by the employers and the OAED.

Since Greece’s accession, the Community has provided substantial financial support for any programme designed to permit or facilitate trained adults to be rapidly absorbed by the labour market, the most recent example being the OAED’s Active Vocational Guidance for Women project, under which women are trained for what have traditionally been male occupations. All the above-mentioned vocational training programmes for adults are free of charge to anyone who is interested.





## In Ireland\*

*R. Fox*

This article describes the funding system for vocational education and training in Ireland. The article concentrates on funding by the State or its agencies. The first part provides a brief overview of the Irish vocational education and training system and this is then followed by a general explanation of the funding system. Finally, a description of the funding mechanism used for certain important types of training is given.

Vocational education and training in Ireland entered a new and more advanced stage in the 1960s. This was part of the State's general intervention to promote economic growth based on industrialization through export-led growth. In this context, it was vitally important to have a highly trained workforce to attract industry to Ireland and to ensure Ireland's competitive position. Hence, during this time, a number of executive training agencies were set-up; AnCO – the Industrial Training Authority in 1967 and CERT – the Council for Education, Recruitment and Training for the Hotel and Catering and Tourism industries in 1963. During the same period the Department of Labour was created with overall responsibility for manpower policy including training. Furthermore, the role of vocational education was reviewed by the Department of Education resulting in the decision to expand considerably technologically-orientated third level education through Regional Technical Colleges and the National Institute for Higher Education.

As regards the financing of vocational education and training, it has been State

policy that the responsibility for training employed persons rests with the individual employer. The State's role is to encourage and assist firms in meeting their responsibilities. But for persons in the educational system, or who are unemployed, the State plays a greater role. There has been a growing involvement by the State in the provision and funding of vocational education and training which reflects the growing problem of unemployment in Ireland both for younger and older persons. Increasingly, too, access to training is now seen as a right of the individual as well as a necessary part of the smooth functioning of industry and business.

It will be useful to consider vocational education and vocational training separately. For the purposes of this article vocational education includes technical, business and occupationally-specific education at third level institutions, and specific vocational training and secretarial courses run in second level schools. In institutional terms all these courses are the responsibility of the Department of Education. These courses are mainly funded by the Department of Education from general tax revenue. Fees are payable for the majority of third level courses but do not meet more than a small proportion of the costs of running them. Third level students who meet certain criteria are also eligible for grants to cover the cost of fees and to provide a living allowance. As well as the funding from general tax revenue and fees, a small amount of income is raised to cover costs – particularly in the major universities. In addition, a number of vocational training courses are part-funded by the European Social Fund and the Youth Employment Levy (see below).

As regards the funding of vocational training of unemployed persons, the Department of Labour is responsible for the allocation of State funds. Up until 1982 the main source of funds was general tax revenue supplemented by support from the European Social Fund. Ireland, as a priority region within the EEC, is able to recoup 55 % of eligible expenditure on the training of unemployed persons from the European Social Fund. This has made a major contribution to Ireland's ability to provide training for the many unemployed persons needing it. The State agencies for training the unemployed, AnCO and CERT, have been the main recipients of this funding and the numbers trained by them have grown rapidly over the last decade. There are also a number of other institutions, both public and private which receive State funds for vocational training.

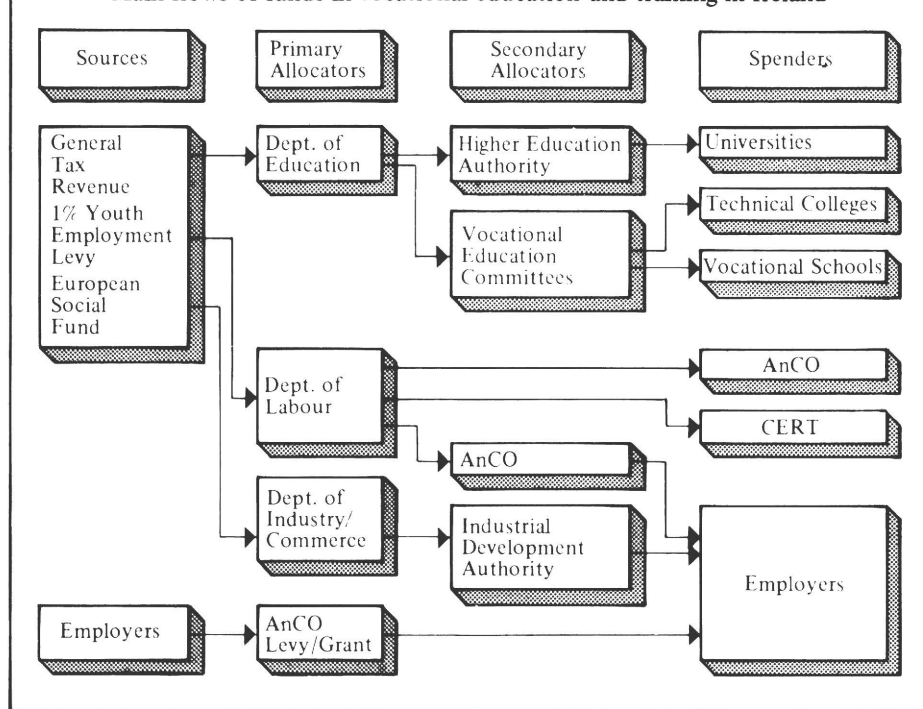
Significant changes in the system of financing vocational training for young persons occurred in 1982 with the introduction of a Youth Employment Levy and the creation of the Youth Employment Agency. This levy is payable at the rate of 1 % on all private incomes and is for the training and employment of young persons under the age of 25. This levy, together with European Social Fund, now provides the finance for almost all training for young persons (excluding those in employment), while training for older persons continues to be funded through normal government tax revenues plus European Social Fund.

As already noted, the training of employees is seen as the primary responsibility of the employer. But the State encourages this training in a number of ways. AnCo operates a levy/grant system for firms in the manufacturing and construction sectors.

\* This article is based on the forthcoming study by C. Murphy.

# Dossier

Main flows of funds in vocational education and training in Ireland



All companies above a certain minimum size (approximately 15 employees) must pay a levy of 1% to 1½% of their wage bill. AnCO's role is to collect the levy, agree and monitor training programmes, and approve a refund of 90% of the levy if agreed standards are reached. Ten percent of the levy is used to cover the administration of the scheme and any remaining funds are allocated to promote special training schemes within industry.

Grant schemes for new and expanding firms in the manufacturing and international services sectors are in existence. New Industry Training Grants are paid by Ireland's development agencies to cover the full cost of training recruits for new firms. These grants

cover training costs and wage costs of those in training. Domestic Industry Training Grants are also available to firms who are undertaking a major development associated with the introduction of new technology, an expansion of output, a change to a new product line or in the raw material processed. The cost of both of these schemes is met by government from general tax revenue with certain portions being eligible for European Social Fund support. The State also encourages management and supervisory training in a few ways. A Technical Assistance Grants scheme is run by AnCO to pay up to 50% of the cost of attendance by management and supervisory personnel and by trade union officials at

approved training courses in manufacturing industry and distribution. The costs of this scheme are met from general tax revenue. The State also subsidizes the main providers of management training through annual grants from the Department of Labour.

Finally, it may be of interest to indicate in general the funding system for apprentice training in Ireland. Apprentices serve a four year apprenticeship in Ireland during which time they spend periods of time off-the-job. During the first year apprentices should spend their time in a mixture of off-the-job vocational training in approved training centres, and off-the-job vocational education in educational establishments. Then during their second and third year they should again receive a period of vocational education. These periods of training and vocational education are provided free by the State. Employers, must however, pay the wage costs of their apprentices while on off-the-job training though they can often claim grants under the AnCO Levy/Grant system for this purpose. In overall terms, therefore, the costs of apprenticeship training are borne by the State (through general tax revenue and the youth levy), the European Social Fund, individual employers and levy funds raised from employers collectively in each industrial sector. In order to summarize the position the diagram presents a simplified view of the funding system.

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## In Italy

*D. Pescarollo*

### 1. Foreword

Before reviewing the agencies that regulate the flow of funds to vocational training activities in Italy and their internal machinery, it may be helpful to clarify a few points.

■ This memorandum describes the extra-scholastic system of vocational training established by Law 845 of 21 December 1978. The purpose of that Law was to set up public sector training schemes whereby young people could acquire working skills and find their first jobs and adults could retrain or take refresher courses as part of adult vocational training.

■ The system includes neither the training in vocational skills provided in upper secondary education (in State vocational institutes), which is regulated and administered by the Education Ministry, nor basic or advanced technical/administrative training for those employed in companies in the various sectors of production.

### 2. The general picture

Vocational training for young people seeking their first jobs and adults acquiring new skills used to be administered directly by the Ministry of Labour in its own establishments. Now that sections 117 and 118 of the Italian Constitution and Decree Law 10 of 1972 have transferred authority for the control and management of such vocational training to the regions, it is provided directly by the regional authorities.

The system as a whole was finally regulated by Law 845 in 1978. This is known as the 'outline law on vocational training' since it

sets out general, definitive principles with which regional legislators must comply.

Before the introduction of this Law, spending on vocational training was the province of the 'Fondo per l'Addestramento Professionale dei Lavoratori' (the Workers' Vocational Training Fund, FAPL). The Fund derived its resources from an amount earmarked out of the government's general budget (20 %) and a grant (80 %) from the 'Istituto Nazionale per la Previdenza Sociale' (National Social Security Institute - INPS), which in turn came from the insurance contributions paid by employers in respect of all their employees. Section 23 of the outline law did away with this fund and established new procedures for the accumulation and distribution of public money. In regulating the financial agencies, the outline law today distinguishes between two categories of training:

**1. Ordinary training:** designed for school-leavers with a certificate of completion of compulsory education, the minimum academic requirement for acceptance. The one-, two- or three-year courses for young people lead to a diploma in a vocational skill. Under section 33 of the outline law, training in regions with ordinary statutes is financed by:

□ the *Fondo Comune* - a 'Common Fund' coming under the Minister for the Treasury, introduced by Law 281 of 1970, and shared out among the regions with ordinary statutes in the light of socio-economic parameters characteristic of their individual status (see 3.1); quotas from the Workers' Vocational Training Fund (FAPL) that were being allocated in 1979

and that have since been updated on a percentage basis from year to year. These quotas were earmarked for schemes for which funds had been approved but not paid out by the time the outline law came into effect; they are now channelled into the 'Common Fund';

□ a supplementary grant made by each region with ordinary statutes out of its own budget, usually covering up to three-quarters of the overall cost of initial training.

Regions with special statutes (Sicily, Sardinia, Valle d'Aosta, Friuli and Trentino) finance their own vocational training independently, by means of grants made in compliance with their own ordinary finance legislation, depending on each region's statutes. The exception to this arrangement is the region of Sardinia, which does not have its own ordinary financing law and still receives a grant from the Ministry of Labour.

**2. Activities for which the Labour Ministry is responsible:** these include the general training and coordination covered by Section 18 of Law 845, for which the government continued to be responsible after responsibility for vocational training in general was transferred to the regional authorities by decree. The activities are funded directly by the Ministry of Labour and consist of:

□ vocational training for workers abroad;

□ training of personnel who are to be assigned to technical and cooperative aid programmes for the benefit of developing nations;

□ studies, research and documentation for information and experimental projects;

# Dossier

- ☐ refresher training for vocational training instructors;
- ☐ supplementary funding of training projects qualifying for European Community or international aid;
- ☐ vocational training measures to promote employment in those areas in central and northern Italy where there is a marked imbalance between the demand for and supply of labour.

These activities are financed out of the *Fondo per la Mobilità della Manodopera* (see 3.2). This 'Manpower Mobility Fund' was established by section 28, Law 675 of 1977 on industrial redevelopment. The Law also allocated LIT 100 000 million towards activities associated with job skill retraining in companies in difficulties, the funds for which are administered by the Labour Ministry. The Fund in general does not come within the national budget and is not subject to government finance laws. Its purpose is to permit a rapid response to exceptional needs.

### 3. Activities in regions with special statutes for which the Labour Ministry retains responsibility.

These include the payment of insurance contributions for apprentice craftsmen, special work projects and reafforestation projects, technical and vocational guidance and residual activities.

*Vocational training to promote young people's employment*, under Law 285 of 1977. The Law has now expired, but the schemes for which funds have already been approved are still administered on a transitional basis.

*Istituto per lo Sviluppo della Formazione Professionale dei Lavoratori*: ISFOL (the Institute for the Promotion of Workers' Vocational Training) provides technical support to the Labour Ministry and regional authorities in the field of training.

All these activities are funded out of specific chapters of the national budget (Chapters 8053 and 8055), and are subject to standard regulations on pre- and post-verification.

### 4. Training associated with projects receiving grants out of European Community Funds.

Most of the schemes are European Social Fund projects for which public and private sector agencies have applied, through the Labour Ministry, for non-returnable grants

of 50 % of the cost. The balance of 50 %, funded out of the public purse, is covered by the *Revolving Fund* (see 3.3), which is administered independently and does not come under the budget. This Fund makes grants at the direct request of regional authorities or public bodies.

5. *Training activities associated with special projects* where there is a marked imbalance between the local supply of and demand for labour in southern Italian regions. Public funds are provided for this purpose, distributed out of the *Supplementary Fund* (see 3.4) to cover the portion of costs not directly borne by the regional authorities. The Fund makes such grants only to schemes that have already obtained funds from the regions; in other words, it is used to supplement existing investment outlay.

## 3. Profile of Funds

### 1. 'Fondo Comune' – Common Fund

The Common Fund was introduced by Law 281 of 1970 laying down financial measures relating to regions with ordinary statutes.

Section 8 of the Law provided for a deposit to be held by the Ministry for the Treasury (derived from the revenue from certain government taxes). It also defined the parameters for sharing out the deposit among regions with ordinary statutes in the light of factors such as their resident population, geographical size, emigration rate, the number of registered unemployed and average per capita income tax.

An *ad hoc* regional committee attached to the Ministry for the Budget is responsible for sharing out the Common Fund among the regions in response to various requirements (vocational training, development projects, etc.), based on the parameters listed above.

As already described in section 2, the Common Fund goes to regions with ordinary statutes. They in turn may assign it directly to training, supplementing it out of their own funds, or channel it to the regional budget to be shared out among the individual regional, provincial or local council departments.

### 2. 'Fondo per la Mobilità della Manodopera' – Manpower Mobility Fund.

This Fund, set up by section 28 of Law 675, comes under the Labour Ministry. It is

independently administered and does not form part of the national budget. It goes towards:

- ☐ aid to promote the mobility of labour, both inside and outside Italy, through recruitment and work initiation;
- ☐ the reimbursement of travel and installation costs incurred by mobile workers.

The Fund derives 50 % of its resources from the levies for the 'Fondo per la Ristrutturazione e Riconversione Industriale' (the industrial reorganization and redevelopment fund, also set up by Law 675), and 50 % from payments into the 'Cassa Integrazione Guadagni' (earnings supplement fund).

Law 675 has now expired but the distribution to multiannual programmes of funds that have been approved but not yet paid out is governed by a law referring back to this legislation.

In addition to the sum of LIT 100 000 million earmarked for the activities mentioned, the Fund is topped up annually by grants from a specific chapter of the budget, the amount of which is determined by the the national budget law. This is used to finance training directly administered by the Labour Ministry as described in section 18 of the outline law. The Fund also receives the money allocated to the former workers' vocational training fund that was approved but not paid out by 1979.

### 3. 'Fondo di Rotazione' – Revolving Fund

This Fund was introduced by section 25 of Law 846 to help public and private sector agencies gain access to the European Social Fund and the Regional Development Fund.

The Fund has been allocated the sum of LIT 100 000 million. In the year it began, 1979, this sum was charged against the national budget, but more recently it has ceased to be part of routinely administered funds and has become an extra-budgetary item. The machinery whereby the Fund now obtains its resources is as follows: each year the Labour Ministry levies two-thirds of the extra revenue accruing to the national social security institute (INPS) from employers' supplementary contributions in respect of 'compulsory insurance against involuntary unemployment'; the Ministry then channels that money to the Revolving Fund.



In other words, since 1975 every employer pays a proportionate levy to alleviate unemployment, together with the normal social security contributions for each member of the work force (pensions, sickness, etc.). This levy was increased by 0.30 % by the outline law, two-thirds of which go to the Revolving Fund.

Every three months, INPS pays the additional contributions over to the Labour Ministry. If the Ministry does not use those contributions within a period of two years, it must return them to INPS.

The Ministry for the Budget's Regional Committee shares out the Revolving Fund among regions and public bodies requesting funds, in the light of social parameters, the criteria for which are laid down by the 'Comitato Interministeriale per la Programmazione Economica' (CIPE - the interministerial committee for economic planning). Irrespective of these criteria (as a result of which the percentages earmarked may vary from one year to the next), total resources are divided into two main quotas: 60 % goes to southern Italy and 40 % to the north.

The regional authorities may not authorize European Social Fund or Regional Development projects if the 50 % contribution which has to be made out of national funds exceeds the resources placed at their disposal by the Revolving Fund.

#### 4. 'Fondo Integrativo' - Supplementary Fund

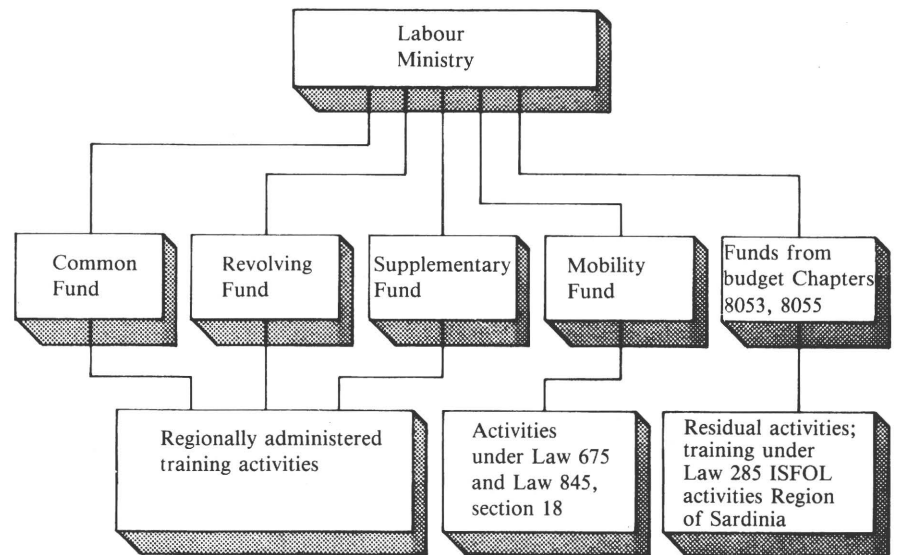
This Fund was set up by section 26 of the outline law to finance special projects in southern Italian regions designed to alleviate local unemployment.

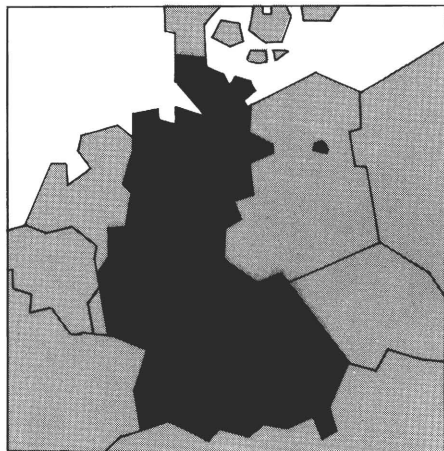
One-third of additional revenue accruing to INPS from employers' compulsory insu-

rance against involuntary unemployment goes to this Fund, but if it is unused it is not returned to that Institute.

It cannot be given as a non-repayable subsidy, but is granted only if the regional authorities allocate a grant to individual projects out of their own budgets.

#### 4. The channelling of funds for vocational training





## In the Federal Republic of Germany

*E. A. Gärtner*

### □ Vocational training

Vocational training in the Federal Republic is characterized by the high level of involvement of firms in both initial and continuing training. Although there is no legal obligation, firms in all sectors participate in vocational training. Some 500 000 firms provide training, most in the craft, industry and trade sectors.

The attitude of employers towards vocational training is largely determined by the following three factors: the traditional view taken of vocational training, a vital self-interest in the training of tomorrow's skilled workers and acceptance of a task that is in the public interest.

A special feature of initial vocational training is the interplay of schools and firms as places of learning. Hence the term 'dual system' for this form of training. The firm plays the major role in this system, trainees spending an average of 3½ days a week in the firm and 1½ days at the vocational school.

### □ Main features of the financing system

All the costs associated with the in-company part of the training are borne by the firms themselves, while in-school training is funded from the resources of the appropriate local authority.

As expenditure on vocational training is a cost item for firms, the price of goods and services normally covers not only production, development and general operating

costs but also the costs of vocational training. A portion of a firm's training costs is covered by the proceeds of work performed by trainees during their training. Like costs, these proceeds differ depending on the occupation in which the training is provided, the size of the firm, the sector, the structure of the firm and the way in which the training is organized.

In-school training is the responsibility of the 11 Federal *Länder*. Teaching in vocational schools is consequently financed by the *Länder* from their tax revenues. The construction and maintenance of schools are financed by the local authorities, although they can obtain grants from the *Länder* to build new schools.

### □ Costs and financing

As the onus to teach skills and knowledge is on the firm rather than the vocational school and as the law requires firms to pay each trainee a training allowance, they bear far more of the expense of training than the

State. In 1981 the dual system resulted in the following breakdown of costs:

Net cost\* of in-company vocational training: DM 17 700 m = 87.1 %

Public expenditure on part-time vocational schools: DM 2 600 m = 12.9 %

At the end of 1980 a total of 1 715 500 young people were undergoing in-company initial vocational training and thus attending part-time vocational schools. Firms providing training accordingly spent DM 10 289 on each trainee, the State DM 1 528.

As all sectors of the employment system and all sizes of firm, from the smallest to the largest, provide vocational training, any statement on the cost of training in individual occupations and sectors can give no more than a general idea of the sums concerned. This should be borne in mind when the following data on the net and gross cost of vocational training to firms in 1980/81 are considered.

(in DM p.a.)

| <i>Training sector</i>     | <i>Gross costs</i> | <i>Net costs</i> |
|----------------------------|--------------------|------------------|
| <i>Industry and trade</i>  | 19 442             | 12 447           |
| <i>Crafts</i>              | 14 513             | 7 949            |
| <i>Liberal professions</i> | 17 512             | 11 276           |
| <i>Public service</i>      | 23 689             | 19 956           |
| <i>Agriculture</i>         | 13 825             | 3 644            |
| <i>Average</i>             | 17 043             | 10 289           |

\* The net cost of in-company vocational training is equal to gross costs less the proceeds of work performed during training.

The largest single cost item in in-company training is the training allowance, a kind of training subsidy required by collective agreements for most training situations and governed by the training contract. The next largest item consists of trainers' salaries. Capital costs, i.e. depreciation on buildings, machinery and equipment, are a major item only where training is provided in the training workshops of large companies.

The close links between training and the production process or the daily routine in a small firm and the general isolation of training from productive activities in large companies largely account for the substantial differences in training cost. The variation in costs due to differences in the way in which training is organized consequently emerges very clearly from a comparison of small and large firms, as the following example of training costs in a small craft firm and a large industrial company shows:

*(in DM p.a.)*

|                  | <i>Gross costs</i> | <i>Net costs</i> |
|------------------|--------------------|------------------|
| <i>Craft:</i>    |                    |                  |
| Hairdresser      | 11 433             | 7 467            |
| Painter          | 14 622             | 5 130            |
| <i>Industry:</i> |                    |                  |
| Turner           | 30 698             | 24 978           |
| Printer          | 24 438             | 16 993           |

The decisions firms take on the amount of training they will provide are influenced by the cost of training to varying degrees. A tightly organized form of workshop training entailing substantial fixed costs owing to the extensive capital resources involved does not permit a major, rapid departure from the average level of training capacity utilization. In their decisions on the numbers they should train, large companies are therefore guided more by their future need for skilled employees than smaller firms, which are able to react more flexibly. But costs and financing also play an important part in the thinking of smaller firms. For them the increasing efficiency of trainees as training progresses is a major incentive to train more people than they actually need.

The number of young people looking for training places in firms has grown steadily since 1976. Economic difficulties have also

been a feature of this period. Nonetheless, the demand for training places has largely been satisfied in recent years. This means that the decisions firms have taken on training have not been governed solely by cost and financing considerations – important though they are for any company. From 1976 to 1983 the number of new training contracts concluded rose from about 500 000 to about 678 000, with trade and industry providing some 90 % of these places. This development is not only due to the vocational training policy: it is also a sign of acceptance by firms and their organizations that the training of young people, being in the public interest, is one of their foremost tasks.

## □ Government assistance for vocational training

For society vocational training that is largely paid for by firms is a low-cost system in several respects. It is also related to actual occupations and facilitates the transition to permanent employment. But without government assistance it cannot solve all the problems. The training of young people who are difficult to integrate and of the many different categories of the handicapped and underprivileged, which has become an important task under a vocational training policy committed to socio-ethical principles, cannot be left entirely to private companies, whose main aim must be to stand their ground in the market. The government has therefore introduced numerous schemes to assist vocational training. They include the creation of intercompany training centres to supplement training in small firms, support for the vocational

training of underprivileged and indigent young people and assistance for girls, trainees who lose their training places when firms go bankrupt and problem regions.

Given the government's basic attitude towards the dual system, the assistance it provides in such cases is always supplementary. It nevertheless contributes to efforts to overcome temporary problems in vocational training and to provide training for young people whose prospects of learning a trade would otherwise be less than optimal.

The following diagram gives some idea of the assistance provided by the government, related to the financing of vocational training.

## □ The various methods of financing

The debate on the financing of vocational training has raged for many years, dominated by the trade unions' call for financing by individual firms to be replaced with a comprehensive levy-based financing system. Training in firms would not then depend on their costs and earnings, training would not vary in quality, competition would not be distorted by differences in the costs incurred by firms, there would be no regional shortcomings and, above all, the number of training places would be increased. The opponents of a system of this kind refer to the volume of resources required (some 3 % of the economy's total labour costs), the unreasonable burden it would place on labour-intensive firms, possible structural distortions, the bureaucracy that would be involved and uncertainty about the objective being achieved.

The trend in the supply of in-company training places in recent years has invalidated a major argument advanced by the advocates of a comprehensive financing arrangement: there has been a substantial increase even without the financing system being changed. In the Federal Republic of Germany the supply of in-company training places depends on the largely traditional attitude of the employers. Financial assistance granted under a financing arrangement would therefore have to be used to provide training that is usually available even without such assistance. In countries where employers are less committed to vocational training it may be necessary to offer them the incentive of grants from

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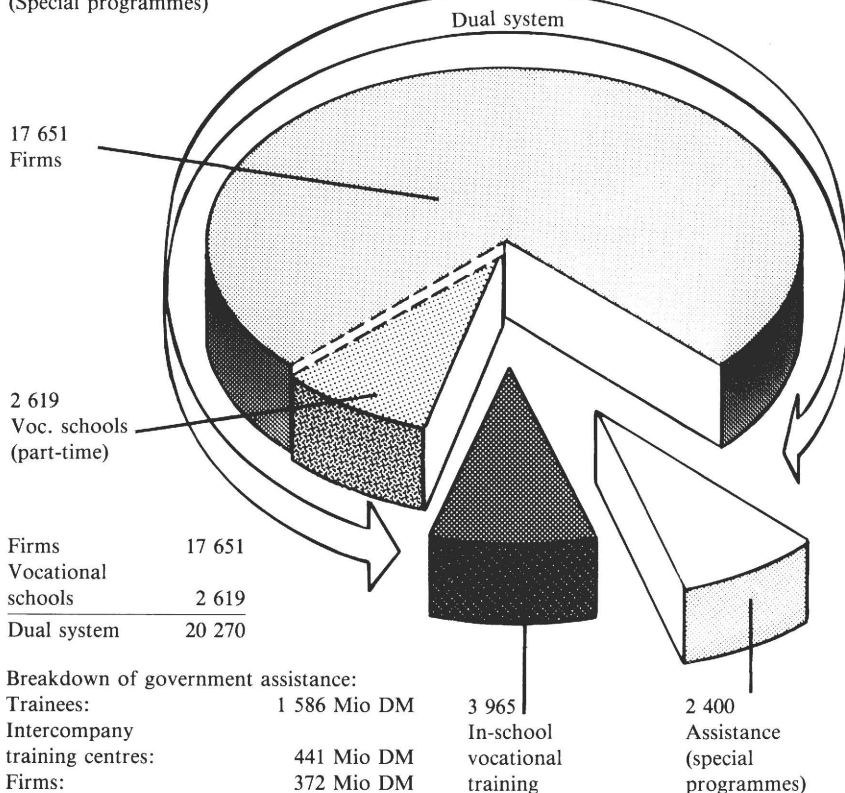
collective resources, whether derived from taxes or levies, if they are to play a greater part in vocational training.

## Funds provided to finance and assist vocational training in 1981, in millions of DM

Total expenditure by firms, the government and the Federal Employment Institute: 26 635 Mio DM

Breakdown of expenditure:

|  |               |
|--|---------------|
| Firms                                      | 17 651 Mio DM |
| Vocational schools                         | 6 584 Mio DM  |
| Government assistance (Special programmes) | 2 400 Mio DM  |







## In the United Kingdom

*Keith Drake*

The diagrammatic representation of the structure of UK training finance 1982/83 incorporates author estimates, to the nearest UKL 10 million, which are based on financial flows identifiable in publicly available data. Because of the fragmentation and paucity of data on training finance in the United Kingdom it is necessary to estimate in order to describe. Although the diagram suggests that over UKL 6 000 million was raised for training, this probably underestimates total funding by ignoring household training expenditures and undercounting spending in intermediate and private training organizations. So it can be treated only as a very broad indication of the relative importance of the institutional routes and financing instruments by means of which funds are raised, allocated and spent.

Just over half of all identifiable training funds are diverted from the cash flow of households and employers by general taxation. In 1981 29% of all tax revenues came from personal incomes, 28% from goods and services, 20% from social security, 13% from property and 8% from corporate income. Most of the central tax funds are allocated by four government departments: the Department of Education and Science (non-university post-school education in England and universities throughout Great Britain); the Welsh Office Education Department (non-university post-school education in Wales); the Scottish Education Department (non-university post-school education in Scotland) and the Northern Ireland Education Department (university and non-university post-school education in Northern Ireland). In addition, considerable public funds are distributed in Great

Britain by the Manpower Services Commission, a public agency managed by the social partners together with local authority and educational representation, and in Northern Ireland by the Department of Economic Development, which in 1982 absorbed the province's equivalent to the MSC, the Department of Manpower Services.

However, a large proportion of these public funds are paid over to local authorities annually in a Rate Support Grant as the central government's contribution to the cost of locally-administered services, predominantly education. In England and Wales these central government funds account for about three fifths of all net approved expenditures by local authorities, the remainder coming from a local property tax. Excluding the Isle of Man and the Scilly Isles, there are 121 local authorities with educational responsibilities: 104 in England and Wales, 12 in Scotland and 5 in Northern Ireland. The main exception to this decentralization of public spending to local authorities is 43 universities and the London and Manchester Business Schools, over 80% of whose income comes by direct grant on the recommendation of the University Grants Committee. In addition, some other university-level institutions receive direct grants, the Open University, the Royal College of Art and the Cranfield Institute of Technology from the DES; the colleges of education and central institutions in Scotland from the Scottish Education Department or (three central institutions) the Department of Agriculture and Fisheries for Scotland; the Ulster Polytechnic, both Northern Ireland universities and colleges of education from the Department of Education for Northern Ireland. The independent University of Buckingham is gift and

fee financed and receives no public funds. In total 46 universities, 31 polytechnics, 14 central institutions and over 800 further education colleges receive public training funds by these diverse routes. The final component of public training expenditures is the UKL 530 million for in-house training of national and local government civilian employees, including trainee salaries, and over UKL 10 million used to buy training services in the public sector or from intermediate and private trainers in 1982/83.

Any distinction between education and training is arbitrary because of the variety of structured learning experiences which, under certain circumstances, can improve present or future job performance. In the diagram training is conservatively defined to include only those who were on courses with a very specific occupational content, i.e. just under two in five of all full-time students in non-advanced and advanced further education and universities. They benefited in 1982/83 not only from UKL 2 030 million spent on their training, but also from some of the UKL 420 million of income support for trainees allocated by local education authorities and the MSC. The remainder of the quarter or more of public training funds not spent in educational establishments or by government-as-employer went to subsidize the training costs of intermediate organizations like Industry Training Boards or of employers (UKL 490 million in 1982/83).

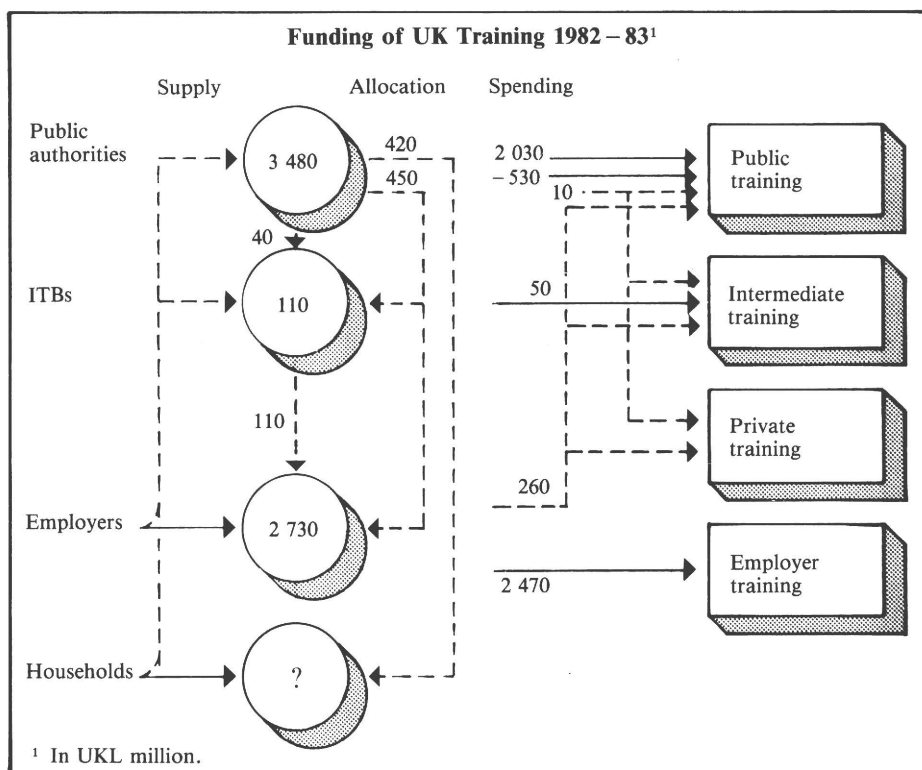
During 1982/83 public funding of ITB operating costs by the MSC was discontinued, the number of ITBs was reduced to seven and some alterations in their scope were made. MSC funding through ITBs, financial support for redundant apprentices and for adult training is tending to decline,

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while its funding of special measures for young people has grown since the Youth Training Scheme replaced the Youth Opportunities Programme throughout Great Britain in 1983. In Northern Ireland, public training provision is disproportionate to a population which is less than 3 % of that of the whole United Kingdom. By 1981 Northern Ireland had 14 % of all UK Skill-centre places for those wishing to change occupations or to upgrade existing skills. Its Youth Training Programme was introduced one year ahead of Britain's YTS, with the distinctive compensation for the province's peculiar shortage of employer-based training opportunities: a much heavier emphasis than in YTS on the funding of training in Skillcentres, further education colleges and community-based Work Preparation Units rather than workplace experience.

Many non-profit voluntary organizations, sometimes with the fiscal privileges of charity status, finance training. Many train for commerce, e.g. banks and financial institutions, for a nationalized industry such as coal, gas or the railways, or for occupations, especially the professions. Non-statutory training organizations draw income from diverse sources, from private donations, from market-type activities via subscriptions and sale of services, by grants from firms and from government. The best known intermediate training organizations are probably the statutory ITBs, whose industries – construction, engineering, road transport, plastics processing, hotel and catering, clothing and offshore petroleum – employ about 30 % of the workforce in Great Britain. ITB income is raised primarily by exemptible and non-exemptible levy on employers in their industry. Since this levy is raised using statutory powers it is in effect a training tax. Small firms are excluded from levy; firms whose training meets Board training criteria are exempted from the exemptible levy. In



1982/83 their grant aid to employer training more or less matched in size their levy income, but public funds from the MSC and sale of services enabled them to spend around UKL 50 million on their own training provision and that by other intermediate organizations.

For many years it has been government policy that the main responsibility for the training of those in employment lies with their employers. British employers carry out some initial training for young people with the aid of government grants under the Youth Training Scheme, and on a much smaller scale, with ITB grants. But the great mass of identifiable employer training expenditures are not even partially subsid-

ized from public funds. They are regarded as a normal production cost and are met out of each enterprise's cash flow. About 10 % of the cost of this identifiable off the job training is estimated as being purchased through fees paid to public sector educational establishments, intermediate and private trainers. The rest of this heavy expenditure, which includes trainee salaries, would then be devoted to off-the-job training which is employer-provided as well as employer-financed. Only if the publicly-funded training activities of the government-as-civilian-employer are added to the self-financed training of private employers is it likely that employers are financially responsible for just over half of all identifiable training expenditures.

## Bibliography

### The report of the working party on open learning

Edited by *Susan Ricketts*

Pub. AnCO, Dublin 1983, 70 pp. (EN).

On 5 October 1981 a working party was set up in Ireland to review the subject of distance learning, its members being representative of the three AnCO training departments. Its terms of reference were to investigate open learning, consider the potential for its introduction in Ireland, pave the way and draw up a financial plan for new projects and, finally, to evaluate headway with those projects.

Its initial aim was to make contact with people and institutions with practical working experience in distance learning at European level and to sift through publications on this theme.

The working party's report sets out its findings and provides an inside view of distance learning and the debate surrounding the issue in Ireland. Since the country has virtually no open learning courses as yet, a particular aim was to consider the extent to which they could be introduced into the Irish educational system. From the report it is apparent that this type of learning might meet the needs of people not being reached by the training and education now available, although certain criteria must be applied when selecting participants.

Besides considering open learning in general, the report contains a chapter on individual distance learning systems brought into being in other countries.

It ends with a bibliography of 30 specific publications in English.

### Education of adults at a distance

*A report of the Open University's Tenth Anniversary International Conference*

Edited by *Michael W. Neil* (in cooperation with the Open University), London, Kogan Page, 1981, pp. 270 (EN)

This is a report and analysis of an international conference on the subject of distance

learning, marking the 10th anniversary of the founding of the Open University in Birmingham in 1969. Edited by Michael W. Neil (of the Open University's Institute for Educational Technology), it opens with a prologue by Michael J. Pentz (who also teaches in the Open University and was academic director at the conference). The purpose of the conference, attended by about 200 individuals and representatives of institutions from all over the world, was to pool, discuss and assess experience acquired in the planning and conduct of distance learning projects. The conference also reviewed the progress made in various directions toward improving and honing those projects. The point should be made that the theme of the conference was distance learning in general at every level, not just in the academic field.

After the introductory section (which includes four papers read during the plenary session), Michael W. Neil pinpoints the essence of the numerous discussions and papers given in individual work groups. In his extensive commentary, his analysis of distance learning is not confined to the industrialized world; benefiting from the international nature of the conference, he also surveys the problems that arise in developing nations.

Of the 80 or so working papers given at the conference (their titles are listed in the Appendix and they can be obtained individually from the Open University), six have been reprinted in full after the commentary because of their very general relevance.

### Distance learning and adult students

*A review of recent developments in the public education sector*

Pub. ACACE (Advisory Council for Adult and Continuing Education), Leicester 1983, 71 pp. (EN)

ACACE is an advisory body set up by the Secretary of State for Education and Science, its essential sphere being adult education in England and Wales, especially the promotion of cooperation between individual providers of that type of educa-

tion and the development of policies for the future.

In this report, ACACE draws attention to certain current ventures in the form of distance training courses in the United Kingdom. In describing educational opportunities, it stresses the importance of such courses to adults, defining the nature of the groups of people opting for this type of learning and the factors that determine their choice. Its research is based on a questionnaire, reproduced in an appendix. The appendix also lists those who worked on the research and the names of ACACE members.

The report does not cover the methods, curricula and target audience of the Open University, since it has produced and published its own reports and research on its work.

### Distance no object

*Examples of Open Learning in Scotland*

Published by the *Scottish Education Department*.

Edinburgh 1982, 173 pp. (EN)

This survey, conducted on behalf of the Scottish Education Department, pertains solely to distance education in Scotland. As pointed out by Judith Duncan in the preface, this form of learning is of special value and relevance in such extensively rural geo-social areas as Scotland.

The 26 articles (the authors are listed at the beginning of the book) are grouped under five general headings. The first two articles are on the diachronic development of distance learning up to the present. The nine articles in the second section describe various forms of distance learning projects in existence in Scotland today. The next two themes are 'methodology, costs and grants' (seven articles) and 'radio and television broadcasting and distance learning' (four articles). There are four articles on the fifth and last theme, experience acquired so far 'from the students' viewpoint'.

A broad but detailed picture of open learning in Scotland today is provided by recounting the personal experience of people from every category involved: educa-

tionalists, officials from the education authority, teachers, instructors, tutors, a BBC technician and of course the users themselves.

## Status and trends of distance education

*Börje Holmberg*

London/New York 1981, 200 pp. (EN)

The author has worked in distance education in Sweden for 20 years and is now the director of the Central Institute for Research on Distance Education at Hagen Open University (founded in 1975), where he is also professor of the Methodology of Distance Education.

His book reviews aspects of open learning in the light of an analysis of the basic concept of this type of education and the underlying principles ('the philosophy of distance education'). He examines the theoretical prerequisites for that education and its relationships with general learning, in the context of the specific characteristics of its users and the various models of education on offer. Bearing these theories and principles in mind, he traces the development, methods and goals of correspondence courses.

In his book, Holmberg sheds interesting light on the current situation and some innovative trends.

The book incorporates an extensive bibliography, mainly of English and German language publications (pp. 143–194) from throughout the world, as well as a useful index to the subjects covered.

## Privater Fernunterricht in der Bundesrepublik Deutschland und im Ausland

*Willi Karow*

'Schriften zur Berufsbildungsforschung' series, Vol. 58, Bundesinstitut für Berufsbildung (BIBB), pub. by Schroedel, Hannover, 1980, 383 pp. (DE)

As Matthias Rick, Deputy Secretary to BIBB – the Federal Vocational Training Institute – reminds us in his preface, one of the duties of this well known Institute is to 'contribute, by means of publishing research and promoting development projects, towards the improvement and expansion of distance vocational training'.

In his searching monograph on private sector distance learning inside and outside the Federal Republic of Germany, Willi Karow takes us step by step through the development of this educational strategy. Although the stress is on Germany, he covers 16 countries in industrialized Western Europe as well as outlining the particular situation in Japan, the Republic of South Africa and the United States.

The report describes the nature, goals and methods of distance learning set up and administered in the private sector. There follows an interesting assessment of the factors, past and present, which have been making a growing impact on the establishment and growth of open learning. Karow's account of national systems is derived from a survey conducted by BIBB over a three-year period in 1975–77, the findings of which are set out for each country in a comparable format.

After describing the 16 national contexts, the author embarks on his own summary assessment and comparison. In the final section, he suggests alternative paths for the development of non-government distance learning in the FR of Germany.

Of special note is the bibliography at the end (pp. 331–383, 1 002 entries, mainly in English, Swedish and German), in our view one of the most exhaustive guides to publications that will help the interested reader to explore the subject for himself.

## Bildungsentscheidung und Lernverhalten von Fernunterrichtsteilnehmern

*Hannelore Albrecht and Christoph Ehmann*

'Informationen zum beruflichen Fernunterricht' series, volume 9, pub. Bundesinstitut für Berufsbildung (BIBB), Berlin 1983, 108 pp. (DE)

This issue (on 'the choice of training and learning behaviour of distance learners') studies the psychological and vocational motivation that has led a very broad-based section of the public in the Federal Republic of Germany to opt for open learning as the most appropriate solution to its continuing and adult education needs. This motivation should constantly be borne in mind when organizing distance training and structuring its content. The information will also help to assess the extent to which alternative forms of continuing training (such as uni-

versity extension courses) may influence the choice of distance learning. The first part of the research report (C. Ehmann) is an analysis of statistical material made available by six leading German distance education establishments. In the light of the data compiled, Ehmann describes the regional features of such education, first seen from the national viewpoint and then taking one *Land* as a paradigm (in this case, Northern Rhineland/Westphalia).

In the second section, Hannelore Albrecht reviews material derived from interviews with 26 people taking part in a distance training scheme who replied freely to a battery of questions on their own histories. Christoph Ehmann then looks at the implications of the findings for the preparation of distance training teaching material.

Appendix 1 contains the main conclusions of a working conference on 'the motivation of distance learners' within BIBB on 16–17 November 1981. The book ends with an *ad hoc* bibliography (Appendix 2).

## Auswirkungen des Fernunterrichtsschutzgesetzes (FernUSG)

*Christoph Ehmann*

'Informationen zum beruflichen Fernunterricht', volume 8, pub. Bundesinstitut für Berufsbildung (BIBB), Berlin 1982, 34 pp. (DE)

In this BIBB booklet on the repercussions of the law on distance learning, Christoph Ehmann reviews the situation in the aftermath of the law enacted by the Federal Parliament on 24 August 1976 to regulate distance education. Since the law came into force on 1 January 1977, all distance education schemes have been subject to prior consideration by the authorities and must be licensed. These licences are granted by the Federal distance education authority (Staatliche Zentralstelle für Fernunterricht – ZFU) and in certain instances are conditional on an assessment by BIBB.

There was a vital and pressing need for this legislation in a very delicate area where 'cowboy' distance education colleges and courses were proliferating.

Although the distance learning market has now been scaled down, the law has not yet achieved the desired effect in the field of vocational training and it has not effectively safeguarded the user's interests.



The author sets out a series of proposals, observing that nearly 90% of distance-learning course students in general say that the main reason for their choice is job-related.

## EDB-støttet Fjernuddannelse

*Et udviklingsarbejde med anvendelse af et datakommunikationssystem i forbindelse med fjernundervisning*

Thomas Tylén

Pub. by SEL (Statens Erhvervspædagogiske Læreruddannelse), Copenhagen 1984, 20 pp. (DK)

This information booklet produced by SEL (the National Institute for the Training of Vocational Trainers in Denmark) recounts an interesting experiment in distance learning for teachers.

The scheme was launched as part of a reform of basic training in the engineering industry. Its aim was to combine instruction in technical subjects with an introduction to natural science, mathematics and information technology.

In providing a refresher and retraining course for trainer/teachers in the institutes concerned who had come together to form 'study clubs', the SEL educationalists made use of a data communications system developed by the Danish Post Office. The study materials used up to that time were of the traditional type (specialist publications, monographs, manuals, etc.). A seminar was held each year so that the people involved could meet and discuss their work. The SEL specialists are now investigating the possibility of adapting the pilot scheme to other categories of training.

## Ratgeber für Fernunterricht '84

*mit amtlichem Verzeichnis aller zugelassenen Fernlehrgänge*

Staatliche Zentralstelle für Fernunterricht der Länder der Bundesrepublik Deutschland (ZFU), Peter-Welter-Platz 2, 5000 Cologne 1, Cologne 1984, 85 pp. (DE)

This 'guide to distance learning — with a list of all officially recognized distance courses' — has now reached its 6th edition, updated to March 1984.

As he points out in the introduction, H. G. Haagman, the Director of the Federal central bureau for distance education in German *Länder* (ZFU), the aim of the guide is

to channel information, both general and specific, on open education now available in Germany — a rapidly expanding sector of education — to the general public.

Haagman points out that anyone interested can obtain personal advice by contacting ZFU direct or, in the case of distance vocational training courses regulated by the Federal authorities, the Bundesinstitut für Berufsbildung (BIBB) in Berlin. An exhaustive list is given of the courses currently on offer (classified according to qualifications, in alphabetical order), followed by a full list of distance education colleges in Germany.

The book reminds its readers (on p. 68) that 260 courses for foreign workers have also been developed. The titles of these courses, which are given in the languages of the most widely represented ethnic groups in the Federal Republic of Germany, may be obtained from ZFU. It is to be hoped that the guide will reach the widest possible audience.

## Formazione professionale a distanza

*Ricerca ISFOL-IREF sull'insegnamento per corrispondenza in Italia*

'Quaderni di formazione' series, pub. by ISFOL (Istituto per lo Sviluppo Professionale dei Lavoratori), Via B. Eustachio 8, Rome, No 76 (September/October 1981), 170 pp. (IT)

Issue 76 in this series of publications on education and training summarizes extensive research on distance education in Italy and the colleges through which it is imparted that has been carried out jointly by a group of experts from ISFOL and IREF (Istituto di Ricerche Educative e Formative — the Institute for Research on Education and Training).

Following an introduction, the authors define the scope of their research and working methods. They go on to discuss a series of themes associated with the providers and users of distance education in Italy. They take a searching look at the brochures and curricula of 16 Italian correspondence colleges, whose names are — for obvious reasons — not disclosed. In reviewing all the educational courses on offer, they found a considerable number of courses in job-related skills: 385. The most common, in that they were included in the brochures of every one of the 16 colleges, were industry-based,

for example for electricians and technicians in electronics. Next came courses leading to office and administrative jobs (12 colleges). Many were also offered in 'creative' occupations (photography, painting, design, etc.) and for work in traditionally 'female' spheres (dressmaking, reception, hairdressing).

The type of training least well represented was for agricultural trades, being included in the brochure of only one college. Also fairly limited were courses in data processing, available from only six colleges.

After a detailed list of all the training offered 'by correspondence' come the findings of a survey on the principal media used for publicizing distance education: advertising in magazines, newspapers and television. The publication considers the cost to course users and the contracts between colleges and their students, including the small print, before outlining a picture of correspondence schools and reviewing trends in distance training in general.

The booklet concludes with a bibliography (covering Italian publications) and a list of seminars and congresses held in Italy in 1981.

## International information service to start in 1984

*Article by Keith Harry and Walter Perry in Open Line, No 37, September 1983, pp. 9–10 (EN)*

With the aid of a grant from the United Nations University (whose main seat is in Tokyo), the Open University in Britain has set up a new International Documentation Centre on Distance Learning. From 1 January 1984, it has been offering information on systems throughout the world. The information has been compiled by means of a questionnaire sent out to private and government institutions providing this kind of education.

The opening of the Centre will, for example, allow exhaustive answers to be provided to enquiries such as 'how many distance learning institutions use television for their courses?' or 'which institutions in a given country require no preliminary qualifications of their users?'

It is to be hoped that the first step for any venture starting up in the field of distance education will be to refer to and consult the Open University centre (Bletchley, Milton Keynes MK3 6HW, United Kingdom).

## Formazione a Distanza

*La seconda didattica*

*Franco Bertoldi*

Publ. Armando, Rome 1980, 163 pp. (IT)

Following the publication of a translation into Italian of the research report by Renée Erdos commissioned by Unesco in 1967 on 'correspondence education' (Rome, Armando, 1971), the debate on distance education has aroused the attention of an ever-wider public in Italy. Echoes of that debate are to be found in many radio and television broadcasts and in general interest publications (such as the articles by linguist Tullio De Mauro in the education column of the weekly magazine *L'Espresso* on 6 March, 10 April and 16 June 1983 and, more recently, on 29 April 1984).

This book is by a close observer of innovative forms of teaching, Franco Bertoldi, Professor of Experimental Pedagogy at Milan Catholic University. With an introduction by Guiseppe De Maio, Chairman of AISCO (Associazione Italiana Scuole per Corrispondenza – the Italian Association of Correspondence Colleges), the report opens with a brief history of distance training. In the first five chapters (pp. 9–130), the author reviews the variables existing and interacting in distance education (an all-em-

bracing but more appropriate term for what used to be known as 'correspondence courses', although this expression is still in use, particularly in English-speaking countries): sociological and cultural conditions, demand and supply, information and the training offered, educational aids, the role of tutors and their students, success and failure and the public and private cost. The sixth and final chapter is an interesting analysis of the techniques and teaching methods used in this type of education which does without face-to-face contact between teacher and learner.

## **L'éducation permanente des adultes par les média et d'autres méthodes à distance: Les expériences européennes**

*Keith Harry, Anthony Kaye,  
Kevin Wilson*

Open University (Distance Education Research Group – DERG), Milton Keynes, June 1981, 2 typescripts, 111 and 139 pp. (in the French translation reviewed here); (FR and EN)

The first section of this survey, produced on behalf of the Commission of the European

pean Communities, contains the 'main report' on European experience in permanent education for adults in Europe, based on the media and using the methods typical of distance training.

Preliminary comments on adult education are followed by a chapter defining the working hypotheses and aims of the research. In Chapter 3, the core of the first part of the research, the authors describe in detail some of the sectors and problems arising in their field. They go on to discuss the issues encountered all over the world and make recommendations for steps that might be taken at Community level in the sphere of competence of the Commission of the European Communities. The first section ends with a bibliography of the works cited in the course of the main body of the report.

The second section (of appendices) summarizes a number of adult education case histories (Part I), gives a list of projects and ventures with a breakdown by European Community Member States (II) and provides a useful selective analytical bibliography, also by country (III).

The report deals exhaustively with the complex problems reviewed up to 1981 (the date of its publication) and fulfils its aim of providing guidance. It deserves to be consulted and read attentively.

## Open space

### New technologies: distance studies, a cheap continuing training instrument for small and medium-sized firms

Distance studies are increasingly becoming a suitable and cheap instrument for the teaching of sound knowledge on new technologies and forms of organization. Distance-study courses can be adjusted flexibly to the needs of the moment and are far cheaper than traditional continuing training courses. Despite this, small and medium-sized firms have yet to take real advantage of distance-study courses in the continuing training of their employees. Marketing measures aimed specifically at these firms are needed to overcome their reservations, which are usually due to a lack of information. This is one of the conclusions drawn during the third workshop on distance studies, a report on which has now been published by the Federal Institute on Vocational Training.

During the 1983 workshop the representatives of various firms and institutions reported on their experience of distance-study courses. Taking the introduction of colour television in the Federal Republic in 1967 as an example, Albert Westerhold of the SEL company in Pforzheim, which has been running distance-study courses mostly on digital technology, electrical engineering and microprocessor technology since 1966, showed how specialized firms – mostly small and medium-sized – have benefited from courses of this kind.

That distance studies are suitable not only for technical subjects but also for behaviour-oriented learning objectives is evident from the '99-day training course' developed by the Reemtsma company. This course is designed to bring about general emotional stabilization and to improve self-confidence and personal initiative. As Ulrike Koch of Reemtsma's Information and Continuing Training Department reported, over 3 000 people have now taken the course, and they include not only members of Reemtsma's own workforce but also the employees of small and medium-sized firms that have obtained the teaching material from Reemtsma.

The publication 'Fernunterricht in Klein- und Mittelbetrieben' has appeared as No 12 in the *Informationen zum beruflichen Fernunterricht* series and can be obtained for a token fee from Bundesinstitut für Berufsbildung, Referat Presse- und Veröffentlichungswesen, Fehrbelliner Platz 3, 1000 Berlin 31.

### Distance-study courses for German pupils abroad

In cooperation with the Foreign Office and the Federal Administrative Office, the Central Office for Distance Studies of the *Länder* organized a conference on 'distance studies for German pupils abroad' held at the Foreign Ministry in Bonn on 10 November 1983.

Some 50 experts from organizations, institutes, foundations, authorities, academies and associations concerned, however indirectly, with the employment of German nationals abroad heard a talk on the distance-study scheme for German pupils abroad and took part in the ensuing discussion. This scheme consists of two parts. The first, intended for children of pre-school and primary school age, can draw on experience gained since about 1971, provides appropriate tuition in correspondence form and is attuned to children's minds. The correspondence courses are available from the German Primary and Secondary Distance-study School Giessen-Kleinlinden.

The second part of the scheme, which is offered by the Institut für Lernsysteme GmbH in Hamburg, is designed for children in classes 5 to 7 of secondary schools and consists of multi-media courses, i.e. correspondence courses based on and backed by school books authorized for use in the Federal Republic and other technical aids, together with written instructions for the parents.

Both parts of the scheme were planned and set up with the financial assistance of the Foreign Office (DM 1.9 m). A board consisting of professionally competent representatives of the Foreign Office, the Federal Administrative Office (Central Office for Education Abroad), the Central Office for

Distance Studies of the *Länder* and the Foreign Affairs Committee of the Conference of the Education Ministers of the *Länder* supervised the planning of the two parts of the scheme, taking a particular interest in the underlying objectives, the subject taught and the technical requirements and ensuring that the provisions of the Protection of Distance-study Participants Act and the international treaty on distance studies were observed.

Some 400 children of German parents who occasionally live abroad in places where there is no German school are at present participating in the scheme.

In his opening speech the Director of the Central Office for Distance Studies of the *Länder*, Hans Günter Haagman, said:

'This form of distance is the initial concept of a method, of distance-study didactics adjusted to children of school age. Until comparatively recently – and this not only in the Federal Republic of Germany – all distance-study methods were geared to adult education. Children who take part in this scheme cannot work on their own responsibility, as adults taking distance-study courses are expected to do. Parents or some other person of authority therefore has to be involved in the learning process. Material designed for the parents (manuals, parents' books) consequently form part of the concept. This was essential to the adjusted didactic methods used.

To begin with, the response among Germans abroad to the then little known distance-study scheme was poor. The efforts of the Foreign Office and of the private organizers have now been recognized, and it can therefore be assumed that the popularity of the distance-study scheme for German pupils abroad has grown.

The primary aim of the conference on 10 November 1983 was to familiarize all the staff of authorities, institutions and organizations with the distance-study scheme so that they might pass on the message. The scheme, which is to be extended to include the 10th-year syllabus, mainly helps German and German-speaking children living abroad with their parents, the Federal Republic's development and social policies and not least its economic policy.'

# Dossier

The idea of developing this distance-study scheme for German pupils and young people abroad was first suggested by the Central Office for Distance Studies of the

*Länder*, which approached the Foreign Office as long ago as 1971/72 and received considerable support from the then State Secretary in the Foreign Office, Dr Hilde-

gard Hamm-Brücher, and her staff in the Education Department of the Foreign Office.



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