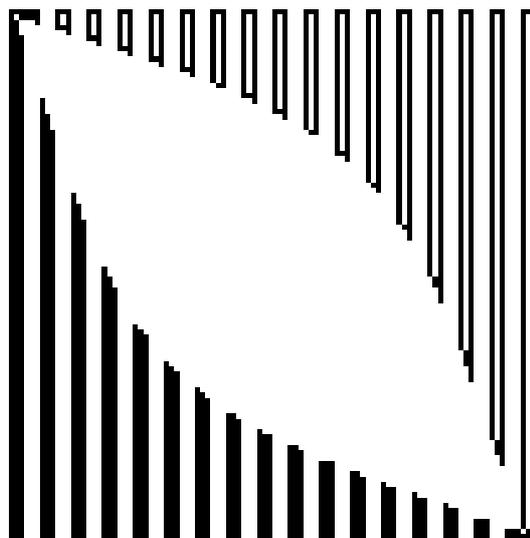


# THEMATIC REVIEW ON ADULT LEARNING



## NORWAY

### COUNTRY NOTE

**Visit:** March 2000

**First version:** November 2000

**This version:** March 2001

*Norway has granted the OECD permission to include this document on the OECD Internet Home Page. The views expressed in the document are those of the author(s) and not necessarily those of Norway, the OECD or its Member countries. The copyright conditions governing access to information on the OECD Home Page are provided at <http://www.oecd.org/copyr.htm>*

## TABLE OF CONTENTS

1. INTRODUCTION .....	2
1.1. Objectives and organisation of the thematic review .....	2
1.2 Norway's participation in the Review .....	3
1.3 Structure of the Review .....	3
2. GENERAL OVERVIEW OF THE COMPETENCE REFORM AND ITS CONTEXT.....	3
2.1 Overview of the Competence Reform .....	3
2.2 Maintaining traditional support for adult education .....	6
2.3 Promoting a strong economy .....	7
2.4 Promoting a streamlined delivery system.....	9
2.5 Improving quality .....	13
3. EMERGING PATTERNS OF THE ADULT LEARNING SYSTEM.....	15
3.1 Adult learners.....	15
3.2 Providers of adult learning.....	20
3.3 Labour market training as an Active Labour Market Policy .....	20
4. ORGANISING THEMES.....	22
4.1 Theme 1: How are different actors addressing ways to improve incentives and motivation for adults to learn?.....	22
4.2 Theme 2: What integration exists to provide and encourage participation in adult learning?..	27
4.3 Theme 3: What is being done to improve the quality, pedagogy and variety of learning provisions?.....	30
4.4 Theme 4: What is being done to assure policy coherence and effectiveness?.....	34
5. CONCLUSIONS.....	38
5.1 Recommendations.....	39
5.2 Final observations.....	40
GLOSSARY .....	42
BIBLIOGRAPHY.....	43
ANNEX 1 Steering Group, Background Report Author and Co-ordinator.....	44
ANNEX 2 OECD Review Team .....	45
ANNEX 3 Programme of the visit.....	46

## 1. INTRODUCTION

### 1.1 *Objectives and organisation of the thematic review*

When they met in January 1996, OECD Education Ministers argued that far-reaching changes were needed to make lifelong learning for all a reality. “Strategies for lifelong learning need a wholehearted commitment to new system-wide goals, standards and approaches, adapted to the culture and circumstance of each country”. Recognising that adults encountered particular problems in participating in lifelong learning, Ministers called on the OECD to “review and explore new forms of teaching and learning appropriate for adults, whether employed, unemployed or retired”. In October 1997, OECD Labour Ministers amplified the message. They recognised the adverse labour market consequences that arise due to the lack of access to lifelong learning opportunities, and “underlined the importance of ensuring that lifelong learning opportunities are broadly accessible to all persons of working age, in order to sustain and increase their employability”.

In 1998, the OECD and the U.S. Department of Education co-organised an international conference, *How Adults Learn*, to review recent research results and practices with regard to teaching and learning adapted to the needs of adults (OECD and US Department of Education, 1999). One of the conclusions from the conference was that a cross-country thematic review could be a valuable tool for understanding the role of policy and institutional environment in promoting adult learning and drawing policy lessons from different national experiences. In late 1998, the OECD Education Committee launched the Thematic Review on Adult Learning as a joint activity with the Employment, Labour and Social Affairs Committee.

The purpose of the activity is to analyse adult learning policy options under different contexts. It reviews the adequacy of learning opportunities, how to improve access and participation in adult learning and how learning interacts with the labour market. Among the different issues object of analysis are: The patterns of participation in adult learning; diagnoses of the problems that arise because of these patterns; policy programmes and institutional arrangements that have been used by OECD member countries to expand learning opportunities for adults; options that can be regarded as “good practices” under diverse institutional circumstances and how these can be applied more widely within and across countries.

A meeting of national representatives to discuss the terms of reference and indicate interest in participation took place in Paris in June 1999. As a result, ten countries are participating in the Review: Canada, Denmark, Finland, Norway, Portugal, Spain, Sweden, Switzerland, the United Kingdom and the United States. A team of three reviewers, which comprises a rapporteur, from different countries and backgrounds (such as pedagogy, education, economics or social sciences) and two members of the OECD Secretariat visit each country. Each visit lasts about ten days and allows reviewers to capture both education and labour market issues. Each country prepares a Background Report drafted according to guidelines agreed by country representatives and the OECD Secretariat.

The visit enables the reviewers to analyse adult learning in the country on the basis of the Background Report, discussions with representatives of government, administration, employers, trade unions and practitioners, and through site visits. After each visit, the rapporteur, with the help of the review team, prepares a Country Note analysing the main issues concerning adult learning and policy responses in the country under review. The note addresses the four major themes that impinge on participation by adults in learning: Inadequate incentives and motivations for adults to learn; complex pathways between learning settings and a lack of transparency in signalling learning outcomes across a variety of formal and non-formal settings; inappropriate teaching and learning methods; and lack of co-

ordination between various public policies that directly or indirectly affect lifelong learning. A final Comparative Report will address the different issues and policy responses in a comparative perspective, including the insights gathered from the participating countries.

## **1.2 *Norway's participation in the Review***

The review visit took place between 15-24 March 2000. The members of the Norwegian Steering Group, the author of the Background Report and the members of the OECD review team are listed in Annexes 1 and 2. The programme of the visit and meeting participants are given in Annex 3. The review team would like to express their deep gratitude to the Steering Group, the author of the Background Report and the persons who during the visit provided information on specifics and success factors concerning adult learning in Norway.

## **1.3 *Structure of the Review***

The Review first addresses the context within which the Competence Reform is being developed (Section 2). It discusses the actors involved and the building blocks from which this new initiative is being implemented. Section 3 provides a quick snapshot of numbers and trends regarding participation of adults and institutions. Section 4 turns to analysis of what is happening within the four themes of OECD's focus. Section 5 offers concluding observations.

# **2. GENERAL OVERVIEW OF THE COMPETENCE REFORM AND ITS CONTEXT**

## **2.1 *Overview of the Competence Reform***

This review occurred during the beginning stages of Norway's effort to substantially expand continual learning opportunities for *all* adults.<sup>1</sup> Norway calls this sweeping initiative Competence Reform. Its basic framework was adopted by the Norwegian parliament in early 1999, after almost three years of study and consensus building. During the time of the visit the government was preparing additional legislative proposals to round out the framework. Some components are being phased in during the next two to three years, and several research and demonstration efforts have been in operation a few short months.

A Forum for Competence Building, consisting of members from the political authorities in 10 Ministries, employer and employee organisations and various providers of education, has been established to address the issues related to the Competence Reform. There is a reference group, composed of representatives from the same ministries and organisations that meet on a monthly basis. The Ministry of Education, Research and Church Affairs (KUF) has the lead responsibility for the implementation of this reform effort. Within KUF, the Department of Adult Education leads the secretariat and other KUF departments participate in the work as well.

---

1. The OECD's primary focus in the Thematic Review is on adults from 25 through 64 years of age who have left initial education. However, there is recognition that countries have different approaches as to who is counted. In Norway the definition of an adult learner embraces all learning environments, both formal and non-formal. This generally means individuals past the age of 19 – the upper age limit for a traditional student in upper secondary school who has not engaged in a former course of study in an institution of higher education.

The Competence Reform is viewed as a long-term process in which employers, employees and the government must make active contributions. It is based upon a belief that all individuals need a solid basic education, but that the nation can no longer afford a “once educated, always educated” approach. The aims of the reform include promoting:

- A highly skilled and flexible workforce.
- The development of a comprehensive strategy for lifelong learning.
- Better interaction between the education system and the workplace.
- Formal recognition of the workplace as a place of learning.
- Development of more flexible training opportunities and better use of information and communications technology (ICT).

Measures to facilitate success are included in the Competence Reform:

- Adults will have an individual right to primary, lower secondary and upper secondary education; the government intends the right for upper secondary education to come into force in the autumn of 2000 and for primary and secondary education from the autumn of 2002 onward.
- Individuals are no longer taxed for the value of courses paid for by their employer.
- Individuals have been given the right to a study leave from their jobs from January 2001 onward.<sup>2</sup>
- Student loan and grant regulations have been altered to make it more attractive for adults to participate in education. A monthly income of NOK 5 000 without deductions will be allowed. The income limit for means tests against spouses’ or legal partners’ income is raised to NOK 16 900 from 12 495.
- A system is to be established for documentation and recognition of non-formal learning for adults.<sup>3</sup>

Institutional reforms must accompany these rights and adults must be offered fiscal incentives if the Competence Reform is to work. Multiple ministries, counties and municipalities, institutions of higher education, non-governmental organisations and workplaces will have to alter policies and practices. A key set of challenges exist to establish coherent policies between the three pillars of adult learning, recognised as the following:

- Non-governmental organisations, *i.e.* the traditional adult education sector.
- The public education system provided by municipalities and counties and higher education institutions.
- The workplace or training provided by outside vendors selected by the employer.

---

2. The financing of subsistence during leave of absence has not yet been established. A committee is working on this question (see footnote 6).

3. The work on this began in 1999 since then over 3 000 individuals have had their competencies assessed.

A critical tool of the Competence Reform meant to “bind together” policies and practices of the different layers of institutions as well as provide incentives to adult learners is the assessment of non-formal competencies. These assessments are to embrace knowledge and skills acquired regardless of the place or source of learning. The goal is that non-formal learning will be recognised by educational institutions and workplaces alike. Building the capacity to document such non-formal learning is one of the key challenges of the Competence Reform.

Other required institutional capacity building efforts identified by the review team include:

- Building sustainable working relationships with employers and educators.
- Promoting flexible, supportive and relevant learning environments for adults with varying needs.
- Establishing quality assurance processes that maintain high standards within education and training institutions while promoting new ways to assess the quality of educational services.
- Developing new information systems that are useful to adults, employers, institutions and national policy makers.
- Modifying, if necessary, financing arrangements to ensure that rights established for all adults can be realised.
- Ensuring compatibility between the policies and practices of different Ministries.
- Developing a comprehensive evaluation approach that helps institutions continuously improve their practices and documents the social benefits of the overall reform.

It is not possible to estimate the total amount of funds that will be allocated for the overall Competence Reform effort, in large measure due to the annual appropriation process. However, one key part of the overall effort is called the Competence Building Program. Norway has pledged approximately NOK 400 million over a two to three year period to help launch this part of the effort. The objective is to create new options and develop the market for continuing education and training that specifically focus on the workplace as a place of learning.

A set of favourable conditions exists for the Competence Reform initiatives to be embraced. Norway is a country of 4.5 million people with a population density of 14 km<sup>2</sup> per inhabitant – among the lowest within OECD countries – although 74 per cent of the population live in towns or built-up areas. Output and employment growth are considerably stronger than in the European Union and the unemployment rate is one of the lowest within the OECD (OECD, 2000*a*). There is recognition that for the economy to grow it will be necessary for an ever-increasing number of individuals to participate in the labour market, and this has helped to spur an array of policy initiatives to promote this.

Along with the other Nordic countries, Norway has a strong tradition of support for initial and adult education. The country spends 6.6 per cent of GDP on education, second after Sweden with 6.8 per cent (OECD, 2000*b*). One reason for this high expenditure is the complex terrain and need to reach individuals in sparsely populated areas.

The total amount of funds spent on adult education and training in the public and private sectors combined is difficult to establish. There are no official statistics regarding employer support for education and training and studies have generated multiple estimates. However, these studies do recognise that

percentages differ significantly across sectors. Training support is provided through tax incentives to employers and individuals and grants to a variety of public and private institutions.

Norway's goals and organisational and fiscal strategies for expanding adults' educational opportunities must be seen in the context of larger efforts to:

- Maintain a connection to the tradition of providing adult education for its own sake, with a strong emphasis on equality and access.
- Ensure a strong economic base.
- Streamline government services.
- Improve the quality of the educational system.

## **2.2 *Maintaining traditional support for adult education***

### **2.2.1 *Study associations***

There is long-standing support for adult education in Norway and the right of access to education is considered appropriate for the public good. The traditional emphasis has been on providing a liberal education via non-governmental study associations, often self-organised or organised by peer support networks. The associations have served as the backbone of adult education initiatives and have been recognised as the primary provider of traditional adult education programmes since the passage of the 1976 Adult Education Act. Currently 22 study associations are entitled to state grants according to this Act and serve more adults than all other providers combined. The missions of study associations and their scope of services vary. Some only work in a single geographic area, while others are national and affiliated with peer networks such as the Workers' Educational Association (AOF) or the major labour unions, or are members of a collaborative of member organisations serving the entire country such as the *Folkeuniversitetet*.

These organisations establish their own study plans and course content. Associations may organise formal education programmes, and many are being requested to do so in the interest of students wanting to qualify for entrance into higher education. While they may not provide formal qualifications, they can arrange for students to take exams as private candidates at a formal upper secondary or higher education institution. The amount of participation and funding has declined over the past several years for non-work/non-formal education related courses. For many study associations this reduction is viewed as a cause for concern in that they feel important social and democratic values are not being given proper weight in the Competence Reform. Some representatives from these organisations felt that the decline in numbers was being driven by the emphasis on labour market related training.

Study associations have promoted innovation to help establish “best practice” approaches in terms of meeting the needs of adult learners. Many have experimented with flexible learning environments in terms of time (*e.g.* evening courses) and the use of distance learning tools. They have been leaders in helping to organise education for immigrants, including helping an increasing number to prepare for language exams.<sup>4</sup>

---

4. Since 1970, immigrants are provided Norwegian language and social science education free of charge through a state reimbursement to the municipalities.

### 2.2.2 *Folk high schools*

Helping young people past the age of compulsory education make a transition into adult life has been a primary role of what are known in Norway as folk high schools. They are boarding schools and primarily serve young adults between the ages of 17 and early 20s in residential and rural settings all over the country. Folk high schools have their roots in the history and culture of a nation that has long supported alternative forms of learning that promote popular enlightenment. In the context of the Competence Reform, they see their role as offering social aspects of competence building (self-esteem, social skills, team building, *etc.*). These institutions have no formal exams, issue no diplomas or degrees and are guided by the philosophy of the organisation operating the school. According to representatives from these schools, they are being called upon by their traditional constituencies to offer courses to help individuals prepare for exams (though they do not offer the exams themselves) to enter into higher education. State grants are available to the 82 folk high schools and many also receive support from local authorities. The approximate cost to students is NOK 35 000 for room and board for 33 weeks, but students may obtain fiscal support from the State Education Loan Fund.

### 2.2.3 *Distance learning networks*

Norway has a long tradition of supporting distance learning endeavours, in part due to its scattered populations and distances, but also because of a strong belief in promoting access to all. There are several distance learning networks: study associations; consortia of higher education institutions or sponsored by individual institutions of higher education; and some private sector firms. There is a separate grant programme for approved institutions and students pay fees. Currently about one-half of the courses are aimed at passing formal education examinations because individuals can only receive a loan or grant if they take such courses. With the Reform's emphasis on generating more flexible learning environments and promoting ICT as a cornerstone of the effort, it can be anticipated there will be a growth in the use of multimedia/distance learning. The Norwegian Agency for Flexible Learning in Higher Education (SOFF) manages grants to promote distance learning at the tertiary level. Through this agency's network partnerships are rapidly expanding with business. These partnerships have placed emphasis on management information technology. A growing number of them are being developed thanks to the changes in certification and apprentice programmes.

## 2.3 *Promoting a strong economy*

Norway has developed a wide array of policy instruments to address the profound shifts caused by the globalisation of trade, changes in technologies, expansion of communications networks and deregulation of the public and private markets to foster wider competition among providers, and to accommodate the realities of the knowledge and information society that characterises the industrialised world.

Norway has one of the lowest unemployment rates among OECD countries with 3.2 per cent in 1999 compared to the OECD average of 6.6 per cent (OECD, 2000c). Long-term unemployment is also infrequent with 6.8 per cent being unemployed for more than one year while the OECD average is 31 per cent. The labour market is tight with vacancies at a high level. Around 80 per cent of enterprises have less than 20 employees and only 5 per cent have more than 100. The strong economy is not assured; and there is recognition that it is necessary to move to a knowledge-based economy. The Ministry of Trade and Industry has the lead responsibility in helping the country achieve these goals. The overall policy is to be sector neutral; however, through sector networks and publicly supported regional organisations research and development funds are used to:

- Promote innovation processes.
- Promote market development.
- Make effective use of information and communications technology.

Small and medium sized firms (SMEs) are targeted and regional organisations can receive up to 50 per cent funding for any project based upon the strategic plans of companies. In order to promote a shift to a knowledge-based economy, the Ministry of Trade and Industry is helping firms establish competency-based processes and constantly advocates practical learning as an essential tool to achieve this goal.

Labour market policy is based on three principle elements aimed at making the market more efficient:

- A structural element to improve the functioning of the labour market, contributing to high participation rates and low unemployment.
- A stand-by function, or an element of stabilisation policy, by which the programmes are adjusted to changes in the market.
- A welfare function, to provide income for the unemployed and those participating in vocational rehabilitation or sheltered work for the weakest groups.

Emphasis is on the word “efficient”. The primary labour market strategy is to ensure that jobs are filled quickly without creating wage and price pressures. Such strategies lead to investment in web-based job placement and counselling services and an emphasis on shorter time in the classroom. These pillars of labour market policy all have bearing on the design and implementation of the overall Competence Reform.

The Ministry of Labour and Government Administration (AAD) has the lead responsibility for labour market programmes with the Public Employment Service (PES) responsible for implementation. Included in the initiatives are wage subsidies for at-risk target groups including the disabled and low-educated job seekers (*e.g.* 50 per cent of wages for six months) (AAD, 1998). Emphasis is also placed on skills training, with approximately three out of four participants engaged in such training. The average length in the first three quarters of 2000 was 15 weeks with a maximum time of ten months. While a choice of training providers (including employers) is allowed, policy preference is given to public providers because they grant formal education qualifications. To illustrate this point, one out of two disabled job seekers is educated and trained in the ordinary public school system. This preference may decline as the Competence Reform effort gains ground and individuals are able to receive recognition for training in the workplace or that offered by private vendors selected by employers. In the beginning of the nineties with high unemployment rates labour market authorities noted an escalation of private providers, part of the reason being the lack of capacity and relevant offers among the public providers. That trend continues, among courses started in the first three quarters of 2000, 53 per cent were delivered by private providers despite the formal preference to use public providers. PES is a strong proponent of modular training based upon workplace requirements because it shortens the time and expense of training and increases relevance to the needs of employers and potential employees.

The active participation of the Confederation of Norwegian Business and Industry (NHO) and the Norwegian Confederation of Trade Unions (LO) is central to Norway’s work in continuing the education of adult learners. These organisations have helped to establish an infrastructure around which both employers and employees work with the public sector as well as their own members. NHO has several

branch organisations representing different industry sectors. The branch organisations provide targeted training to their members, often using private consultants, to ensure that training matches the need of the enterprise. This form of training is often referred to as “the shadow system” and solid numbers on the amount spent and individuals receiving training are not readily available.

The national agreement between the two organisations is one of the most critical tools in the nation’s efforts toward education and training of the workforce. It is this agreement that sets wage rates for a substantial share of the economy. One portion of the Basic Agreement allows individual workers to take study leave to pursue their own educational goals. Such leaves are normally less than two years but an employer may grant longer time. NHO wants to limit education and training to firm-specific needs. LO has several concerns. For example, they question whether it is equitable to rely upon a private sector agreement to ensure that every individual has a right to education. They do not want training to be limited only to the needs of the firm, but want the individual to have a right to determine its breadth and scope.<sup>5</sup>

Another lynchpin of the Competence Reform is the Basic Agreement between NHO and LO. It centres on the development of workers’ competencies. According to the agreement, each firm is to annually update a charting of the qualifications it needs. In co-operation with employees, the firm is then to develop and finance appropriate training measures to help individuals acquire the necessary knowledge and skills. The government would like to see individuals rewarded with increased remuneration for taking advantage of education and training opportunities. However, it recognises that it is the responsibility of NHO and LO to agree to such incentives and promote them among their respective members.

The social partners are concerned about the capacity of SMEs to finance education and training, even if initiatives are undertaken. For example, in the highly skilled graphics sector, nine out of ten enterprises have less than ten employees. In order to meet the needs of this industry the graphics branch association established their own training network some time ago. There is also recognition that the mix of skill requirements varies significantly by sector with many not demanding high skills, thus creating disparities between an individual’s opportunity to meet the needs of the workplace and the goal of the Competence Reform to create a knowledge-based workforce.

#### **2.4 *Promoting a streamlined delivery system***

As the issues of adult education have moved into a more pivotal position in Norway’s policy agenda, several intertwined capacity challenges have emerged. Some concern financing and others are related to the capacity of existing institutions. Education and training needs of adults do not drive mainline delivery and financing schemes – rather, they are a part of a larger set of arrangements. The main issues that will strongly influence the success of a more holistic adult education system in Norway are discussed below.

---

5. At the time of the review team visit, NHO and LO were in negotiation on the national agreement. Talks were breaking off, as had been the case the prior year when no final agreement was reached. The Competence Reform, higher wages and extended holidays were the three primary points of contention. Information received after the visit is that the central issue this year was the funding of subsistence connected to the right to leaves of absence. Negotiations broke down and arbitration was triggered. The head of Arbitration turned to the Prime Minister for assistance in considering the issue of funding of subsistence during leave of absence. The Government (AAD) has appointed a committee, which will present a report by 1 July 2001. AAD assumes that an important role for the PES will be to assist the employers to obtain substitutes.

#### 2.4.1 *Block grants*

KUF is directly responsible for oversight of the higher education institutions and administering the primary, secondary and upper secondary system through a decentralised set of arrangements with 435 municipalities and 19 counties. Municipalities are responsible for compulsory primary and secondary education, while counties are responsible for non-compulsory upper secondary education. In 1986 these combined units of local government successfully advocated for more flexibility in the management of government services. The response of the central government was to establish block grants. Through these grants municipalities and counties are allowed to establish their own priorities within general objectives established by the central government. The block grant covering education includes culture and health services and, within certain parameters, localities can shift funds between these categories. In addition to this core support a variety of earmarked programmes exist. There are funds targeted to specific populations, for example immigrants, or for specific institutions, *i.e.* study associations, distance learning institutions and folk high schools. However, a study done by the National Education Offices in 1997/98 showed that only about one fourth of the 435 municipalities had plans covering adult learning.

In 1993, municipalities spent 70 per cent of their resources on health, social services and education, of which 28 per cent was allocated to education. During that same year, counties spent 85 per cent of their funds on these same services, of which 25 per cent was spent on education. In 1998, municipalities spent 74 per cent of their resources on these services, of which 31 per cent was allocated to education. This rise was due to the increased cost of the 1997 reforms and the need to build kindergartens. In 1998, counties spent 84 per cent of their funds on the same services, of which 24 per cent was spent on education. The source of funds in 1998 was 25 per cent from block grants, 15 per cent from earmarked grants, 46 per cent from taxes, 13 per cent from duty (excise) and 1 per cent from other sources.

#### 2.4.2 *Management reforms*

In 1992, a new decentralised management structure was established via 18 National Education Offices spread throughout the country. The director of each of these offices is the state representative at the county level responsible for all education matters, including adult education, but excluding traditional higher education institutions. The functions of these offices include: 1) promotion of co-ordination between educational sectors and levels and other Ministries and local governments; 2) reporting, evaluating and following-up on results; 3) supervision and control; 4) management training; and 5) centrally managed research and development.

At the local level, other parts of centrally supported government services are implemented and the local units of government have no direct management of or fiscal responsibility for them (*e.g.* labour market services, economic development and higher education institutions). The interrelationships among these various institutions will be discussed in Section 4.4.

#### 2.4.3 *Resource centres*

Resource centres are a new institution emerging in Norway. Their form is not a standardised concept and several models exist. Three examples are listed below, the first being the most frequent:

- Some upper secondary schools consider they have a resource centre when the public employment service asks them to establish programmes for adults that vary from the standard format of the upper secondary school curriculum. This is often the result of regular contact between the school and the labour market office.

- Other schools have established a separate administrative unit within the schools that works actively in the local community to contact private or public enterprises with a need for competence building. The main function of these resource centres is to develop, market and sell courses and training services. They may also take on other tasks for the enterprises and can collaborate with and draw on resources from other providers (schools, study associations, *etc.*).
- A resource centre can also be an independent unit outside the school, *e.g.* a company owned by the county or private sector. These centres are typical examples of units that have a brokering role between business and/or public enterprise on the one hand, and providers of training on the other. Providers are upper secondary schools, study associations and university colleges, depending on the need. They are responsible for all contact with customers until the job is given to one or more providers.

The resource centre idea was promoted as a part of the regional development policy and launched initially with support from the Ministry of Local Government and Regional Development. The largest portion of funds are made available through the Public Employment Service, who buys labour market training courses. KUF began contributing to the Centres in 1998. However, the brokering role of resource centres is very important; they must be market sensitive to survive, as they are required to be self-financed.

#### 2.4.4 Consolidation of higher education institutions

KUF is directly responsible for the higher education system, where more than 90 per cent of the students attend state institutions for free. Several of the private institutions also receive funding from the state. In 1994-98 regional colleges were consolidated. There are now 26 state colleges, four universities, six university colleges and two arts, crafts and design academies. Additionally, several (sometimes conflicting) regulations, were streamlined and made consistent across all institutions in the higher education system within the framework of a common act.

A minimum general matriculation standard was introduced that includes:

- Successful completion of three years of upper secondary education including a foundation course and two advanced courses (regardless of the area of study) or a recognised vocational qualification/trade or journeyman's certificate.
- Successful completion of six core general subjects, which either are included in, or come in addition to, the above-mentioned criteria, with varying durations and levels of attainment. Based on periods or lessons per week, they are: Norwegian (14), Mathematics (5), Natural sciences (5), English (5), History- post 1850 (4), and Social Studies (2).
- Commonly referred to as the "six pack", these courses can be a ticket to upward mobility through the education system and are in high demand by adults throughout the learning enterprise. For example, if a student has attended two years in the vocational track at the upper secondary level he or she can take a one-year advanced course in the core subjects (instead of completing the 4 year vocational track) or attend a half-year course in core subjects after completing the trade or journeyman's certificate.
- There are additional criteria for students pursuing studies in areas such as medicine, engineering, and translation. Such applicants also need additional qualifications from upper secondary school – in mathematics and natural sciences, for the former, and in languages for the latter.

- Adults aged 23 and older need not have passed the normal upper secondary final examination, but must show proof of taking the six pack courses and have at least five years of work experience, or a combination of work, education and training.

Certainly many of the reforms over the past decade have been geared towards improving access to higher education for non-traditional students, but as one noted higher education researcher observed to the review team, little discussion takes place within institutions of higher education about what changes, if any, need to occur within the academy to accommodate them. For the review team, a consequence of this current strategy concerning recognition of non-formal competencies is that colleges and universities will establish their own policies as to how non-formal competencies will be treated within their institutions. The specific implications in terms of equity, access and success of the individual student have yet to be evaluated.<sup>6</sup>

#### 2.4.5 *Creating new capacity via consolidation of adult education service units*

In January 2001 three stand-alone institutions will merge into one: the Norwegian Institute for Adult Education (VOX). Two of the original institutions have existed since the 1970s with responsibility for applied research and development: the current Norwegian Institute of Adult Education (NVI), with approximately 20 employees, and the Norwegian State Institution for Distance Education (NFU), with about ten employees. NVI has its roots in the traditional adult education community and was authorised by the Adult Education Act.

NFU has been responsible for the development of educational materials for flexible learning within subject areas not covered by other institutions. They focus on groups with special needs, *e.g.* the disabled and immigrants. Until 1996 NFU produced educational materials at all levels. The right to produce materials for higher education was taken away in 1996, but institutions of higher education may use educational material developed at primary and upper secondary levels if the institution wants to buy the product and use it and adapt it to the relevant education. All levels will be included in the new institution, VOX.

The third organisation is the State Adult Education Centre (SRV), which the central government inherited from the city of Oslo in 1990. With about 95 employees, SRV is a direct provider of adult education services.<sup>7</sup> The central government absorbed this institution because of political pressure and is now turning it into a “laboratory school” serving about 1 800 students. The staff will be expected to conduct pedagogical development work as a result of their new mission. The school emphasises project-based learning and approximately 80 per cent of the students focus on the six-pack courses needed to advance to higher education.

The consolidated organisation will continue the work of the three merging institutions as of January 2001. It will have the lead responsibility in managing the financing schemes of the Competence Building Program and the development of the non-formal competence recognition system. Operating under KUF’s Department of Adult Education and Educational Funding, its expanded responsibilities will include research to analyse the education needs of adults; and developing a user-friendly information system. As

---

6. Since the time of the visit, Parliament amended the Higher Educational legislation obligating the higher education institutions to consider applicants over 25 without formal entrance qualifications from the autumn 2001 forward. By the autumn of 2000, 15 state colleges and one university had started accepting some students under this provision.

7. The city of Oslo wanted to merge adult learners with regular students at the end of the 1980s, thus causing some stir among the supporters of what is now SRV.

there is recognition that internal expertise for the latter task is lacking, Statistics Norway and the Ministry of Labour will be called upon to help.<sup>8</sup>

At the time of the visit, work had just begun to establish an organisational framework for carrying out this highly visible and important task. It will be essential for this new organisation to generate synergy between the researchers not located in Oslo, the developers of new materials (including the non-formal competence documentation) and practitioners among a wide variety of institutions (most specifically teachers). Building buy-in from other Ministries will also be essential.

## 2.5 *Improving quality*

In addition to the streamlining efforts discussed earlier, during the 1990s Norway witnessed a rapid-fire set of education reforms focused on upgrading the quality of education and training.

Two key reforms in 1994 and 1997 helped to lay the foundation for the current Competence Reform. These prior reforms have not yet had a chance to become firmly embedded in the culture and practice of schools, workplaces and communities. As more than one person observed during the review team visit, it takes time to make changes and a detection of “reform weariness” exists in some of the visited sites.

### 2.5.1 *Reform 94*

Some key features of the 1994 reform are relevant to the adult-focused Competence Reform:

- It established a statutory right to three years of upper secondary education for the age group 16-19, leading to university entrance, vocational qualifications or partial competence.
- Reform 94 introduced the following structure of upper secondary education, based on 13 areas of study:
  1. General and Business Studies (3 years - leading to university entrance qualifications).
  2. Music, Dance and Drama (3 years - leading to university entrance qualifications).
  3. Sports and Physical Education (3 years - leading to university entrance qualifications).

The three areas of study start with a foundation course and move through advanced courses one and two.

The rest are vocational and most of the programmes last 4 years *i.e.* 2+ model (see below):

4. Health and Social Studies.
5. Arts, Crafts and Design Studies.

---

8. The “charter” to manage the Competence Reform needed a home within the government. The original study leading to the Competence Reform called for an independent Development Secretariat outside the jurisdiction of all Ministries, however, the Government’s decision was to house the lead organisation in KUF.

6. Agriculture, Fishing and Forestry.
7. Hotel and Food-Processing Trades.
8. Building and Construction Trades.
9. Technical Building Trades.
10. Electrical Trades.
11. Engineering and Mechanical Trades.
12. Chemical and Processing Trades.
13. Woodworking Trades.<sup>9</sup>

The general pattern for vocational areas of study is: four years of study, of which two are at school and the next two at the workplace (2+ model). There are however deviations from the 2+ model in some subject areas (See OECD, 1998)

Among the major shifts generated through Reform 94 were: 1) an increase in the general education content of vocational courses; 2) reduction in the number of Foundation courses from 109 to 13; 3) establishment of a core curriculum and curricula related to course or subject organised around modules designed to make the work-related portion of the curriculum more relevant to the needs of adult learners and industry; and 4) nation-wide streamlining and standardisation of pathways to entrance into colleges and universities.

National policy is that KUF is responsible for all content of the training curriculum. The curricula for the labour-funded programmes at the upper-secondary level are based upon the framework of this education. Counties are responsible for using these same tools to organise their adult education programmes. When supplying labour market training they must work with PES in organising training programmes.

From a student perspective one of the more popular initiatives is commonly referred to as Section 20, but is now officially Section 3.5 of the new Education Act. It embodies much of what is being promoted in the overall Competence Reform, but focuses on crafts and apprenticable trades. Individuals can sit for exams on the basis of experience that is at least 25 per cent longer than the stipulated apprenticeship period. According to representatives of study organisations preparation for these exams is highly popular – at the same time demand for their other courses, as well as the number of adults applying to upper secondary schools is declining. The popularity of Section 20 (3.5) comes from individuals who value the craft certification recognition but are not interested in pursuing a higher education degree. Also a major motivation among adults is that vocational qualification might often involve a wage increase once they have passed the trade or journeyman's examination. Reform 94 also established apprenticeships in several new occupations, many that had traditionally been female-oriented (*e.g.* day care), and this expansion no doubt also accounts for the high number of students sitting for exams.

As a result of the 94 reforms, the labour market authorities sharpened the focus of training programmes they support by investing in the development of modules that allow both the employer and the individual trainee to pick and choose what they believe to be the essential skills required in the workplace.

---

9. From August 2000, there are two new areas of study, both vocational, Sales and service and media and communication.

### 2.5.2 Reform 97

Additional reforms were initiated three years later that expanded the number of years of compulsory education. Specifically relevant for the adult education system, Reform 97 laid another building block to promote lifelong learning. More emphasis was placed on project-based and cross-disciplinary learning, learning within teams and promoting learning beyond the classroom, and more responsibility was placed on the student for their own learning (OECD, 1998).

### 2.5.3 Beyond 2000: in-between entity providers

An unfinished quality assurance task remains to be addressed. There are public and private schools that do not easily fit into any one category and are referred to as in-between providers. The public technical schools, managed by the counties, primarily serve individuals who already have a trade or journeyman's certificate and at least two years of experience. In addition to technical skills training they also provide leadership training. These institutions confer the status of technician and the right to university or college studies upon graduates. They are regulated by a separate Technical School Education Act. There were about 250 types of education – including bible study, secretarial training and fine arts – provided by other public and private schools in 1999. That same year a Government Committee issued a report recommending that a new act be established for these schools to promote quality assurance. The Committee proposed that they should provide one to two years of education and follow the same basic approaches as other institutions *i.e.* modularised curriculum, building upon the upper secondary education foundations, accepting non-formal competence qualifications and serving as a new pathway to higher education.<sup>10</sup>

## 3. EMERGING PATTERNS OF THE ADULT LEARNING SYSTEM

This section presents some facts and figures on emerging patterns in Norway's adult learning system during the late 1990s. These patterns may be considered as emerging from both the long history and ongoing reforms of adult education. The aims of this Section are twofold: 1) to present key statistics on the adult learning situation in Norway, and 2) whenever possible, to compare the situation in Norway to that of other OECD countries. This section deals first with adult learners and then with providers of adult learning. Finally, the evolution of training as a labour market programme is presented.

### 3.1 Adult learners

According to the results of the Second International Adult Literacy Survey (SIALS), over the 12-month period preceding the survey, 48.4 per cent of the 25-64 year-old respondents had participated in learning (Table 1). Norway's score for overall participation rates is well above the average of 36.4 per cent for the twenty countries for which data are available.

Table 1 also shows that the general pattern – employed adults tending to receive more training than unemployed and out of the labour force adults – is also relevant for Norway. It is particularly true for

---

10. A report to the Storting was presented in December 2000 proposing not to establish a new act for these schools, but instead include new shorter vocational studies in the institutions of higher education. The report also proposes that technical schools should be developed further and that all counties should provide technical schools. Thus the final resolution of how to insure quality in the within these institutions is being addressed, but the details remain to be settled.

job-related training; received by 50.9 per cent of employed adults, it is received by only 26.7 per cent of unemployed adults and 14.5 per cent of those out of the labour force.

Table 2 shows dispersion of adult learning according to different characteristics. In general, in a country with high overall participation such as Norway, the level of inequality in adult education is expected to be relatively smaller than in countries with low participation. The results presented in Table 2 show dispersion by gender, age and place of birth, which remains relatively small. The level of inequality is large, however, according to the level of educational attainment; only 32.4 per cent of adult workers with less than upper secondary education receive job-related training, while the percentage for adult workers with post secondary education is 63.3.

More detailed results in Table 2 show other important findings. In general, men receive more adult education than women, but the difference is not large. This is not true for employed women, however, who receive more training than employed men. Concerning age groups, an obvious age cut is 45; before 45 there is no disparity according to age. After 45 there is a decrease in the amount of training received, but the decrease is relatively smaller for employed adults aged 45-64 than for the whole age group 45-64. In all cases, adults born in Norway receive more training than those born abroad.

Table 3 presents some reasons given by adults for non-participation in learning activities. A rather high percentage – a little more than 30 per cent – have declared that they wanted to learn but could not. This number is high in Norway compared with the average among other OECD countries (21.7 per cent). For job-related training, the main reason given in Norway is related to the lack of time due to job pressure. Time constraints are also the main reason given for non-participation in other types of training.

Another picture of non-participation is given in Table 4, where the proportions of non-participants and participants in training are presented according to the size of the enterprise where they work and their occupation. The traditional concern of less participation in SMEs than in large firms and for blue collar low skilled occupations than for white collar high skill ones is definitely shared by Norway.

**Table 1. Participation in learning of 25-64 year-olds according to type of training and job status, 1994-1998 (%)**

	All Job Status	Employed	Unemployed	Out of the Labour Force
<u>All Types of Training</u>				
Germany	18.1	23.2	26.7	6.9
Australia	35.6	42.2	28.3	16.1
Belgium (Flanders)	21.5	26.8	*16.6	9.8
Canada	36.4	41.9	30.1	23.1
Chile	19.1	22.9	22.9	11.1
Denmark	56.2	60.7	51.1	39.0
United States	41.5	48.5	*30.2	16.9
Finland	58.2	69.9	29.4	32.1
Hungary	18.1	27.7	*9.5	*2.2
Ireland	22.0	29.4	*8.6	14.5
The Netherlands	36.3	43.2	38.8	21.8
<b>Norway</b>	<b>48.4</b>	<b>54.1</b>	<b>*33.2</b>	<b>21.8</b>
New Zealand	46.4	53.1	31.4	29.7
Poland	14.1	20.5	*7.9	2.8
Portugal	13.0	16.7	*9.8	*4.7
Czech Republic	27.2	33.5	*14.3	7.8
United Kingdom	44.9	56.0	33.1	14.3
Slovenia	33.3	42.9	*13.7	10.5
Switzerland	41.5	45.7	32.3	27.3
Sweden	54.3	60.1	45.6	28.7
<i>Average</i>	<i>34.9</i>	<i>42.8</i>	<i>26.4</i>	<i>13.6</i>
<u>Job-related Training **</u>				
Germany	14.9	20.1	25.1	*3.1
Australia	30.3	38.1	23.8	6.9
Belgium (Flanders)	14.0	19.8	*8.6	*0.9
Canada	29.6	37.5	22.0	9.9
Chile	11.7	17.0	*9.3	*2.5
Denmark	48.7	54.6	38.8	26.9
United States	37.6	45.2	*28.5	10.1
Finland	40.0	51.1	*11.6	15.8
Hungary	12.8	19.8	*6.1	*1.4
Ireland	15.8	23.5	*7.1	6.6
The Netherlands	24.1	32.5	*29.4	5.9
<b>Norway</b>	<b>44.4</b>	<b>50.9</b>	<b>*26.7</b>	<b>14.5</b>
New Zealand	38.4	46.9	24.1	16.3
Poland	10.6	16.5	*2.4	1.1
Portugal	-	-	-	-
Czech Republic	21.7	27.3	*11.9	*4.4
United Kingdom	39.7	51.8	24.0	7.0
Slovenia	25.6	34.4	*9.1	*4.4
Switzerland	26.3	31.8	*26.9	6.0
Sweden	-	-	-	-
<i>Average</i>	<i>29.3</i>	<i>37.6</i>	<i>21.4</i>	<i>6.9</i>

Source: IALS-SIALS (second IALS), prepared by the authors.

\* Less than 30 cases in the cell. \*\* Not available for Portugal and Sweden.

**Table 2. Participation in learning of 25-64 year-olds according to different characteristics, type of training and job status, 1997-1998 (%)**

	All types of training		Job-related training	
	All	Employed	All	Employed
All	48.4	54.1	44.4	50.9
By gender				
Male	49.1	51.4	44.8	48.5
Female	47.7	56.8	44	53.7
By age				
25-34	55.0	56.9	50.6	54.6
35-44	54.2	57.9	50.1	54.1
45-64	39.6	49.0	35.9	45.3
By place of birth				
Norway	48.9	54.6	44.9	51.4
Abroad	41.8	46.2	37.2	42.9
By educational attainment				
Less than upper secondary	26.1	36.1	21.7	32.4
Upper secondary	44.9	50.0	41.4	47.2
Post secondary	65.4	67.2	60.5	63.3

Source: SIALS (prepared by the authors).

**Table 3. Reasons for non-participation in learning activities, 1997-1998 (%)**

	Job-related training**		Other Type of Training	
Wanted to learn but could not	31.5	(21.7)	32.5	(18.1)
<u>Reasons for not participating</u>				
Time constraints				
Lack of time	37.7	(38.8)	58.0	(52.6)
Too busy at work	19.3	(16.3)	11.5	(14.2)
Family responsibility	9.0	(15.4)	8.7	(14.9)
Type of training				
Course not offered	15.9	(7.1)	7.2	(3.6)
No money	16.9	(25.9)	11.2	(19.3)
Inconvenient time	5.2	(9.0)	6.9	(7.2)
Language reasons	0.6	(0.9)	0.4	(0.4)
Personal Reasons				
Lack of employer support	7.3	(7.6)	0.3	(0.4)
Health	3.7	(2.6)	7.7	(4.0)
Lack of Qualifications	1.8	(1.3)	0.5	(0.3)
Other	14.4	(9.2)	11.5	(5.5)

Source: SIALS (prepared by the authors).

\* The percent are given for Norway, the average for the 20 countries of the survey are given in parenthesis.

\*\* Not available for Portugal and Sweden.

**Table 4. Training according to enterprise size and occupation, 1997-1998 (%)**

	Non participant	Participant	Total
Total (Sample Size) in numbers	53.2 (1 077)	46.8 (1 006)	100 (2 083)
Enterprise size			
Less than 20	66.3	33.7	100
20-99	54.1	45.9	100
100-499	48.5	51.5	100
More than 500	41.3	58.7	100
Occupation			
Senior Officials and Managers	44.6	55.4	100
Professionals	42.1	57.9	100
Technicians and associate Prof.	41.9	58.1	100
Clerks, Service & Shop Workers	58.9	41.1	100
Blue Collar High-skilled	62.4	37.6	100
Blue Collar Low-skilled	70.5	29.5	100

Source: SIALS (prepared by the authors).

**Table 5. Adult learning providers in Norway, according to number of participants, 1998**

	Number of participants	Percentage
1. Study associations	681 359	70.2
2. Folk high schools	28 236	2.9
3. Distance education institutions	44 731	4.6
4. Municipalities	39 441	4.1
-- Compulsory level leading to public examination	1 877	0.2
-- Training of adult immigrants	28 957	3.0
-- Special needs education at the primary and lower secondary level	7 310	0.8
-- Other adult education at the primary and lower secondary level	1 297	0.1
5. Counties	50 205	5.2
-- Ordinary classes at the upper secondary level	26 942	2.8
-- Section 20 candidates	23 263	2.4
6. Further and continuing education at the university/college level	94 078	9.7
-- Universities	22 067	2.3
-- University colleges	5 508	0.6
-- State colleges	66 503	6.8
7. Institutions providing labour market training <sup>a</sup>	32 869	3.4
<b>Total<sup>b</sup></b>	<b>970 919</b>	<b>100.0</b>

Source: KUF (2000), Table 1, except for section 20 (3.5) candidates in the counties, Table 5.

a) Around 50 per cent of the courses are delivered by private institutions. Participants are counted during the whole year; 27 575 started in 1998.

b) The share of private providers roughly estimated by adding up 1., 2., 3. and half of 7 is 79.4 per cent.

### 3.2 *Providers of adult learning*

According to the Norwegian Background Report on adult learning (KUF, 2000), statistics on adult learning providers are rather incomplete and fragmentary. This is partly due to the fact that the responsibility for adult learning is shared between public and private providers. Table 5, based on administrative data, provides some information about the importance of different providers according to the number of participants. It is important to bear in mind that the distinction between participants and courses is not clear cut, particularly among private providers: a participant may be counted more than once if he or she participates in more than one course. Another limitation is that non-formal training in non-institutionalised settings and on-the-job training in firms are not included. This calls for some caution in the estimated market share of both private and public providers, particularly because the distinction between private and public providers is not always so clear cut. It is true for folk high schools – ten of them are owned by counties – and for institutions providing labour market training.

More information on adult learning providers is given by the results of IALS/SIALS, based on the declaration of interviewed participants in the place where training is taken (Table 6). As in other countries, the workplace is one of the main locations, preceded by conference centres or hotels. Public providers in the traditional education system (elementary or high school and universities or colleges) are somewhat less important (16 per cent).

**Table 6. Place where training is taken, 25-64 year olds Norway and other countries, 1994-1998 (%)**

Place of training	Canada	Finland	Norway	United Kingdom	United States
Elementary or high school	9.5	3.8	6.0	2.1	3.7
University or college campus	17.6	15.7	10.0	19.4	18.1
Business or commercial school	1.3	5.9	0.0	1.8	1.7
Work	24.4	23.4	20.8	36.3	26.0
Training centre	15.6	15.9	21.0	17.5	10.1
Conference centre or hotel	14.0	15.8	27.0	11.0	13.1
Home	4.7	0.3	2.0	2.2	1.5
Community centre or sport facility	5.4	7.7	2.0	1.7	1.0
Elsewhere	7.5	11.5	11.2	8.0	24.8
Total	100.0	100.0	100.0	100.0	100.0

*Source:* IALS/SIALS (prepared by the authors).

### 3.3 *Labour market training as an Active Labour Market Policy*

With a tight labour market, Norway spends relatively little for labour market programmes, especially on training programmes for unemployed adults and those at risk. This has not been always the case, *e.g.* when the unemployment rate was at its peak in the mid-1990s. This has led to a relatively rapid decline in the number of new participants in training programmes, which decreased by approximately one third over the five-year period between 1994 and 1999.

According to Table 7, in 1999 Norway spent 1.3 per cent of its GDP on labour market programmes, of which 64 per cent was for active measures (0.82 per cent of GDP). By comparison, in 1998 the OECD average was 2.2 per cent of GDP, of which 38 per cent was for active measures (0.84 per cent of GDP). The total spent in Norway on labour market programmes has decreased since the mid-1990s following the improved economic situation; it is two times less than in 1993 when unemployment reached

a peak of 6 per cent. However, it is important to stress that active measures showed a relatively smaller decrease than the total and that Norway is one of the few OECD countries – with Italy and Sweden – spending more on active rather than passive measures.

Table 7 also shows that labour market training expenditure was not very important in the late 1990s in Norway compared to the OECD average. This expenditure was much higher in Norway in the early 1990s – closer and even above the OECD average. The decrease is quite recent. The same is true for participants; in 1999, only 1 per cent of the labour force participated in a training programme, while the percentage was 3.6 per cent in 1994.

**Table 7. Public expenditures and participant inflows in labour market programmes**

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<b>Expenditures as a % of GDP</b>															
<u>Total measures</u>															
Norway	1.09	0.85	0.74	0.94	1.83	2.07	2.13	2.47	2.64	2.66	2.44	2.07	1.66	1.39	1.29
OECD average <sup>a</sup>	2.10					1.98					2.49			2.21	
<u>Active measures</u>															
Norway	0.61	0.46	0.36	0.37	0.81	0.92	0.94	1.04	1.15	1.34	1.34	1.17	0.97	0.90	0.82
OECD average <sup>a</sup>	0.66					0.69					0.89			0.84	
<u>Labour market training</u>															
Norway	0.10	0.08	0.05	0.06	0.26	0.33	0.29	0.32	0.33	0.28	0.23	0.18	0.13	0.10	0.05
<i>Training for unemployed adults and those at risk</i>	0.10	0.08	0.05	0.06	0.26	0.33	0.29	0.32	0.33	0.28	0.23	0.18	0.13	0.10	0.05
<i>Training for employed adults</i>	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
OECD average <sup>a</sup>	0.16					0.20					0.25			0.22	
<b>Participant inflows as a % of labour force</b>															
<u>Labour market training</u>															
Norway	..	0.75	0.52	0.62	2.32	2.72	2.85	3.09	3.53	3.59	2.80	2.10	1.60	1.27	1.03
<i>Training for unemployed adults and those at risk</i>	..	0.75	0.52	0.62	2.32	2.72	2.85	3.09	3.53	3.59	2.80	2.10	1.60	1.27	1.03
<i>Training for employed adults</i>	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
OECD average <sup>b</sup>						2.31					4.08			4.40	

Source: OECD database on labour market programmes.

a) The OECD unweighted average covers the year in question and subject to availability, data from the preceding or following year(s).

Data excludes Czech Republic, Hungary, Iceland, Italy, Poland and Turkey.

b) The OECD unweighted average covers the year in question and subject to availability, data from the preceding or following year(s).

Data excludes Czech Republic, Hungary, Iceland, Italy, Japan, Luxembourg, Poland and Turkey.

## 4. ORGANISING THEMES

The review team could only be impressed with Norway's ambitious work over the last decade to improve the overall education and workforce development systems within the country. It was a challenge to remember that many of the specific initiatives related to adult learners had only been underway for a few months. What follows is a set of issues organised around the four themes. There are no final answers regarding the ultimate outcomes, but promising practices, some notes of caution and recommendations are highlighted in each of the theme areas.

### 4.1 *Theme 1: How are different actors addressing ways to improve incentives and motivation for adults to learn?*

#### 4.1.1 *Overview*

An interesting paradox exists. Adult enrolments in education and training programmes have generally declined throughout Norway in the past two years, though for more than three years there has been high-level attention paid to the need to increase participation. Several observers gave a common answer as to why this is so: the tight labour market. This is not unusual and is a phenomenon that other countries, such as the U.S., have also witnessed. The current situation does provide more favourable opportunities for disadvantaged adults to move into the labour market.

Creating the right mix of incentives and eliminating barriers in order to motivate adult learners and employers are at the root of the Competence Reform. Documenting non-formal learning, continuing to support the Section 20 (3.5) option for the craft and apprenticeship exams, increasing access to education at all levels and making it more fiscally attractive to take advantage of higher education are all important motivations for adults to become a part of the knowledge economy that Norway seeks. Though it is too early to observe any substantial increase in higher education enrolments, it is clear that adults are taking advantage of these incentives, as evidenced by the high demand for the six pack and information technology courses.

Another form of financial support centres on fiscal incentives within the workplace. Though the government believes that this type of incentive is a private sector matter to be negotiated between workers and employers, it does recognise that pay for knowledge will be the most powerful motivation for the Competence Reform to succeed. Developing pay incentive rewards for recognised competencies will take time. No doubt the leading firms will be large ones, often operating in the international marketplace.

For several years Norway has made considerable investments in research and surveys of adults on the subject of motivation. The results of several different studies show common and predictable patterns. Highly educated individuals are more likely to want to continue investments in education. Age is a factor. A general finding is that those below age 40 have the highest motivation.

Research has also been conducted on barriers to participation. The results are again predictable. For many the major barrier is the lack of access to education and training at times convenient for them given their other responsibilities. Support systems, such as day care, are essential. Those who participated in traditional county-managed adult education programmes were uncomfortable with the rules that apply to regular upper secondary students and indicated a need for guidance, counselling and support services to help them in the learning process.

Such research has helped to guide the development of the Competence Reform and a portion of NOK 5 million was set aside in 2000 for research and development of pilot projects to document ways to meet these motivational challenges. Strengthening and expanding distance learning opportunities are considered part of the motivation strategy.

Early indicators from projects that have been underway long enough to assess their strengths suggest that, for both incentive and motivation purposes, the projects that have proven most effective in assisting disadvantaged adults include the following characteristics:

- Co-operation with local industry so that students can combine work and school attendance on a flexible basis.
- Synergy of policies and procedures of local social and employment agencies and upper secondary schools to provide housing, schooling, unemployment benefits and part-time work opportunities.
- Co-operation of agencies and local self-help groups (*e.g.* single mothers or other similar social networks).

Curricula based upon modules is another form of incentive to make learning more attractive. This programmatic incentive is strongly supported by unions, employers and AAD. Students in sites the review team visited were also highly favourable, as module-based curricula gives them more flexibility to pick and choose and supports a more flexible schedule. (See next section for examples.)

Another form of motivation cannot be ignored. At the national level the leadership of LO and their business counterpart NHO have shown strong support for the Competence Reform and are investing in their own education efforts with members. While there are clearly differences of opinions between them, both associations are strong advocates of the core purposes of this effort. Their leadership has kept the Competence Reform agenda front and centre in the policy debates for some time.

#### *4.1.2 Promising practices*

Several demonstrations are currently underway to develop the protocols and processes for documenting competencies in work sites, and education and training institutions. These demonstrations are using the upper secondary education requirements discussed in Section 2.4 as a point of departure. Most of the 10 vocational areas of study are projected to last four years. In general, educators with experience in the upper secondary schools have the lead responsibility for comparing and contrasting individuals' learning experiences against one or more portions of the approved syllabus.

These projects build upon prior work referred to as the Partial Competence Project. In this effort one site required only time in the workplace as the single determinant – if an individual had worked at least four years this was defined as being sufficient for enrolment at the second year level in an upper secondary school. In some projects students were interviewed and individual plans developed based upon their work and other life experiences. Testimonials and other information were used to verify work experience in yet another pilot. Portfolios, using a standard format, were emphasised in yet another. The projects in the newer demonstrations the review team visited bear strong similarities to some of the past efforts (Box 1).

### **Box 1. Two examples of systems for documenting non-formal competencies**

Oppland County has a project focused on developing competencies that predates the national pilot effort. They have already learned some lessons and identified several challenges.

One upper secondary school was selected to house the central staff that provides support to a network of seven resource centres spread throughout the county. The resource centres are responsible for broad marketing to employers and individuals. They also are responsible for conducting interviews with potential students to develop individualised learning plans based upon review of documents from the workplace and other sources. The central staff reviews this material and handles complex cases. For the most part there are no external exams included in the process. Special attention is given to assessing the knowledge and skills of immigrants with more emphasis placed on formal testing for this group. The individual is given guidance regarding a variety of learning opportunities to fill in their educational gaps. The range of learning environments is deliberately flexible and mixed; it includes courses on the Internet, self-study, distance education, individual training, learning at work and classes in study groups or upper secondary institutions. Exams and certifications come after participation in one or more of these learning activities.

Challenges identified to date include sorting through the varying regulations of different agencies to determine who is a participant and establishing a common understanding about what that means for each agency. Motivating individuals to “stay the course” is also proving to be a substantial issue. Cost is a dilemma if too much individual counselling and teaching is called for in an individual plan. Generating involvement from small companies – *e.g.* helping them to develop appropriate workplace training based upon an individual’s plan – is proving to be troublesome. The lack of a labour agreement means that costs are being borne predominately by the public sector, as few county employers invest in training of their employees.

Nordland County has only recently begun putting a structure in place to document non-formal learning. A steering committee has been established composed of the public employment service, business and labour, the county education agency, economic development divisions and the association for public employers. Their strategy is targeted on working with specific businesses, and they have solicited the support of about 30 public and private enterprises. They include 15 private sector firms with between five and 20 workers, five municipalities, five agriculture and fishery companies and only five medium sized business (over 50 workers). Nordland County is following much the same model for the actual documentation as Oppland, but they are using staff from technical colleges to compare documentation with the syllabus.

Following is an example of a leading firm’s effort to improve performance based upon a new pay incentive plan (Box 2).

### **Box 2. Pay incentive scheme**

Orkla is a tree-based organic chemical company with 22 000 employees across the world. Borregaard is their subsidiary in Sarpsborg, with 2 800 employees. The subsidiary has launched an ambitious human resources reorganisation that includes a wage structure based on levels of competency. Approximately 2000 tasks for all jobs have been reviewed, sometimes reordered, and placed within the seven levels of competency. The company believes this method has allowed them to pinpoint the differences between formal and real competencies.

The first three levels do not require a craft certificate. The fourth requires a certificate, the fifth level one additional competency, the sixth two additional ones, and the seventh at least one more. Each craft worker is to develop an individual training plan in order to move up the Competence Ladder. This new scheme has required a substantial reorganisation of the way the human resource department conducts its own work. A secretariat has been established to support a central committee composed of management and union representatives. One of the key roles of this committee is to ensure fairness for both the worker and the front-line manager because it was recognised that there is often a “familiarity bias” close to the job. There will be local competence assessment committees centred on approximately ten trades to “certify” workers’ abilities.

The union is in cautious agreement with the plan. However, they do have concerns about workers who have been in their jobs for over 15 years and are over 40 years of age who are hesitant about the required training.

Borregaard has taken several lessons in building this plan from their active participation in the recently restructured apprenticeship programme for upper secondary students.

Examples of projects geared toward assisting disadvantaged adults were visited in Sarpsborg by the review team (Box 3).

### **Box 3. The AOF Reading and Spelling Shop**

Along a main street in Sarpsborg a small storefront has been turned into a friendly and comfortable place for adults with substantial reading disabilities. The average age of the mostly Norwegian students is 33 and there are three times as many men as women. About one-third are unemployed. The third that are working earn about 80 per cent of the medium wage. Some are in a day school supported by Social Services. The classes are small (five to seven) and based on five modules that take about 102 hours each to complete. Assessments are used at least three times in each module with a variety of instructional methods including enhancing students' motivation and self-esteem. The Reading and Spelling Shop staff stays on top of the research related to the needs of the labour market and adult learning. They estimate that approximately 15 per cent of the total population have learning disabilities but believe that in the northern part of Norway the number is closer to 25 per cent. They feel that their programme specifically addresses the needs of this group.

The curricula has been adapted from several sources, including primary school materials made appropriate for adults. The Reading and Spelling Shop has now developed a compendium of materials including instructions for starting a programme, and are planning to sell it to others.

Staff believes that the program's low drop-out rate, which they report is virtually nil, is due to the emphasis on building a strong social network among students and the attention to the individualised needs of each. Their first goal is to help people confront their reading problems and the second is to help people deal with them. An example of success is that about 150 of their "graduates" are on their way to becoming apprentices – about one-third of this group could not read at the sixth grade level upon entering the programme.

AOF Sarpsborg launched this project with support from KUF. As of 2000 it is "self-financed" in that they no longer receive funds from KUF. They do receive support from Social Services, the participants cover some cost, and the union and some employers have also contributed. A similar programme launched in Denmark served as the model. AOF is planning to expand the project in at least six other communities in the near future.

### **Box 4. Another Sarpsborg story: the day high school**

Sponsored by AOF, an adult school for disadvantaged adults was launched in 1993, based upon a Danish model. The day high school attracts adults with educational, social and emotional challenges, 80 per cent of whom are referred by Social Services. Funding comes from the municipal government. The school is highly individualised for its 45 students with ages ranging from 18-60 years. In several ways it is an important way station for adults not ready for upper secondary school. Students learn problem solving and leadership through a shop steward system where some of them negotiate with the paid staff and serve as brokers for the other students. The range of courses includes working on social intelligence, developing social skills, appreciating the arts (e.g. photography, art, music, and dance) and beginning word processing. Over time, the courses become more focused on preparing students for the six-pack courses. There are no exams. Of 1999's students, about half went on to further education and about one third entered labour market training programmes. For the rest of the students, about ten returned to the day school for further study.

#### *4.1.3 Cautions*

Norway is moving in the right direction regarding the development of incentives and motivations for adult learners. Clearly economic returns will be realised by individuals who take advantage of the expanding opportunities for greater access to traditional higher education. The country's strong traditions will help keep a focus on serving and supporting the disadvantaged population. As one observer noted, the Competence Reform is an unfolding process. While this is most certainly the case, there are some concerns about documentation of non-formal competencies that need immediate attention. The review team was made aware of Norway's work with the European Centre for Development of Vocational Training (CEDEFOP) and the Leonardo da Vinci Programme, both of which provide technical assistance with non-formal competence documentation. However, there seems to be a lack of overarching principles driving the actual documentation process.

For example:

- There is no evidence that transparency in the signalling of learning outcomes to be applicable across all institutions will be a prime factor in documentation.
- As yet there are no common definitions and terms used across projects and it is unclear whether there are plans to develop any. Without a common language and criteria employed by everyone, confusion will abound.
- Is only time in the workplace sufficient to assert that an individual is competent?
- Should documentation be based upon the actual task and duties of the workplace? If so, how will these be documented in a way that makes them easily understandable to all stakeholders?
- Is the reliance upon the upper secondary school syllabus a sufficient standard? (The review team heard from one employer that this curriculum was too general to be of use in their apprenticeship programme, thus confirming concerns that more criteria may be required.)
- Are the educators with lead responsibility for conducting the documentation sufficiently versed in workplace skill and knowledge requirements to certify competencies that will have real meaning in pay incentive schemes?
- Should some form of external assessment be developed to validate the initial assumptions made regarding competencies for use by employers as well as education institutions?

There are obviously many unanswered questions regarding how individual higher education institutions embrace and use non-formal documentation of competencies, most particularly the more prestigious ones. Thought will need to be given to the development of guidelines for all of these institutions if equity, access and workplace relevance are to be assured.

Representatives of higher education institutions interviewed by the review team seem to be in favour of opening their doors to individuals without full prerequisite educational credentials. A partial reason for this position may be the decrease of traditional applicants. The preferred approach most discussed during the visit was not to establish internal new procedures to document non-formal learning, but to promote a more open system by allowing all adults above a specific age to take courses. A student's success would be determined by the regular exam at the end of the course. Higher education representatives stressed that this approach would be least disruptive of procedures currently used for intake by their institutions. Documenting non-formal competencies in other ways, they argue, will involve a lot of administrative work. One obvious trade-off to this approach is that it may be costly to the government if individuals are not prepared to be successful – thus the desire for some proof of competence prior to entrance.

The question of financing subsistence during study leave remains essentially undecided to date, and will remain so until the Government's recommendations based upon the Head of Arbitration's request are known. Even after the results of this work are available a concern will remain about the support needed to reorganise the workplace. The importance of adult learning in the workplace is mentioned frequently in the materials leading up to the passage of the new Education Act, but to the review team, the specificity of how it will be promoted, by whom, and what implications there will be for labour market and economic development policies seem to be lacking.

These are examples of issues that the review team believes the Forum and the reference group should place early on their agenda.

#### *4.1.4 Recommendations*

*Targeted research:* During the experimental stage the review team believes it would be prudent to allocate funds specifically for projects directed towards learning more about how to motivate and prepare individuals with learning disabilities. The AOF project that was visited had impressive results, but the review team believes more development work may be required to meet the needs of learning disabled adults.

*Track results in higher education regarding treatment of non-formal assessments:* The evaluation plan and information management systems discussed in Section 4.2 need to specifically track the different strategies being employed by institutions of higher education to assess, over time, the most efficacious ways of promoting access to appropriate post-secondary learning opportunities for adults.

## **4.2 Theme 2: What integration exists to provide and encourage participation in adult learning?**

### *4.2.1 Overview*

It is clear that there has been a continuation of the logic of Norway's education reforms over the past decade. One has built upon the other. While there is still some fragmentation among the various suppliers and Ministries, the overarching goals and implementation strategies being employed are geared towards a holistic approach to providing appropriate education and support services for all adults. Opportunities are still limited for many, particularly those in rural areas and those who work in small firms. But it is important to bear in mind that the work has just begun.

### *4.2.2 Promising practices*

The traditional lack of articulation, via recognition of competencies, acquired in labour market training programmes should, over time, become a non-issue due to the recognition of non-formal learning and modular course taking.

Resources centres, with substantial share of courses bought from the PES, are working with new forms of instruction geared towards the needs of employers. The most market-driven of these centres serve as brokers or intermediaries between education, industry and public institutions and represent a positive approach to helping new institutions grow (Box 4).

### **Box 5. A resource centre**

Mosjøen's upper secondary school has joined forces with the public employment service to develop and test a new model for labour market training. The resulting resource centre builds upon a long-standing relationship between the two entities, as it was the first training centre to be certified in ISO 9001 quality management systems in 1995. It was officially designated as a resource centre in 1996. Eighty per cent of the courses are bought from PES and the rest from the private sector. Its goals are to raise the competence level of adults, focus on the needs of trade and industry, and strengthen the upper secondary schools. The centre is organised as a part of the upper secondary schools and has responsibility for all external activity carried out by them. A key incentive is that the centre may carry unused funds forward into the next budget year – this authority applies irrespective of the economic performance of the county administration.

Contrasting the old and new ways of providing education reveals the value of modular-based instruction. The old way included fixed starting times, which excluded people who had lost jobs after courses started; courses of long duration (normally 30 weeks); and courses ill-adapted to adults and their individual differences. Dropouts received no formal documentation and could not be replaced, generating higher cost per pupil.

The new way is module-based and focused on the individual. It allows for continuous intake and generates formalised qualifications. Prior to adopting the new strategy the maximum capacity for welding classes was 12 individuals, now it is 80. The Ministry of Labour still "buys" 30 weeks of training, but more people move in and out. Dropouts are almost non-existent now.

Instructors have become major advocates of the new approach, partly because they now have more contact with employers and small groups of students working to help one another in the learning process.

Mosjøen's resource centre is working directly with one of the largest employers in the city, serving as both broker and a provider of training (Box 5).

### **Box 6. Elkem Aluminium: A Team Based Training System**

A subsidiary of the world-wide Alcoa Aluminium Company, Elkem has three sites in Norway. The Mosjøen plant, founded in 1957, has many long-time employees. It has downsized from over 1 000 workers ten years ago to currently half that number. There were no layoffs in the interim, due in large measure to a plan whereby workers at age 60 continue part time and at age 62 can receive half of their pay at retirement.

Since 1981, the company has adopted a variety of initiatives to promote continuous improvement. Taking an example from Toyota, they now centre on customer satisfaction as the key driver in improving their business systems, ensure quality at a low cost and shorten the lead-time in all of their systems. All of this work is done through teams. Personality analysis is being used to organise the teams, but the company is convinced that the key is in identifying the competencies required for each. A Competence Toolbox has been developed that includes requirements for developing a team; the professional, technical and leadership skills needed; stability requirements; improvement techniques focused on technical problem solving and maintenance; and business knowledge. A pool of 25 multi-skilled workers assists the teams and helps to promote structured on-the-job training.

An important change Elkem made was moving from five shifts to six in order to "make room for training" in the work schedule. While most of the training continues to be on-the-job, it was determined that more was needed. Individuals have a "tree plan" for training. This is included in a required ten days of training per year that each of the six shifts must undertake.

The firm has no internal education department and uses a mix of service providers for the different types of training. A resource centre serves as the technical trainer for the firm and helps broker other training resources for them. As Elkem knows it will be hiring in about three years, they are now developing an apprenticeship programme in concert with the school.

Elkem's facilities are located in a business park that has been established together with the community's economic development organisation and they are taking the lead in building a community-wide education plan relating to employment issues.

### 4.2.3 Cautions

Though many of Norway's adult education programmes and practices can be called "promising", there is considerable evidence that the state of practice is far from state-of-the-art. In order to move a wider range of institutions into the status of users of promising practices at least three areas struck the review team as needing more attention. The first concerns documenting the most effective strategies to assist firms in making the workplace a centre of learning. It is not necessary to wait for the NHO/LO settlement to begin testing different forms of competence development at workplaces or to share lessons learned about the promising internal strategies.

In several different settings the review team heard calls for more attention in two areas that would benefit all users: information support services; and enhanced guidance and counselling. Both are important infrastructure services that require co-operation from various stakeholders and no one Ministry or institution can go it alone in the design and delivery of either.

### 4.2.4 Recommendations

*Focus demonstrations on the workplace as a place of learning:* The Competence Building Programme provides an opportunity to focus attention on the workplace. It will be necessary to make sure that the demonstrations promote flexibility to accommodate the realities of the workplace. For example, while a great deal of progress has been made in the development of module-based curricula, it is important to combine education with work, such as the shift work strategies noted in the Elkem example. Flexibility is also important for unemployed people participating in a training course but obliged to accept a job if offered; they should be able to return to finish a module if laid off temporarily or permanently.

*Develop a comprehensive information system:* Information systems that are useful to adults, employers, institutions and national policy makers are needed. The review team heard from the research community and at almost every site visit that organising and having access to the right information is one of the major challenges. The new organisation being formed to help implement the Competence Reform is already aware that help from other agencies will be needed to develop an appropriate system. However, more than statistical agencies need to become involved in the design of the system – providers and users will need to be consulted in the process. Consideration should be given to organising an information design project that would include hearings and forums across the country and targeted meetings with stakeholder groups, including evaluation experts, to help organise this task.

A study could be conducted to determine adults' preferred modes of accessing information related to education and training and the capacity of these information gateways to provide counselling and guidance could be assessed. If necessary, training could then be provided to the staff of such organisations (e.g. libraries).

As information systems and guidance structures are improved, it may be wise to use a common set of categories regarding occupational/career pathways around which the information is organised. For example, the 13 clusters that are being used by the upper-secondary schools may be an appropriate platform to build upon.

*Guidance and counselling services need enhancement:* The need for a substantially enhanced guidance and counselling system is evident. It is clear that no one agency "owns" this responsibility and there are not enough adequately trained staff in the schools to help adults become aware of all the options that may be open to them. The review team was informed that labour market authorities have lead responsibility for developing and staffing vocational guidance and counselling efforts in all of the counties

in terms of employability of adults. However, during the review team visit, labour market officials knew of no special plans to carry it out in the context of the Competence Reform.

In the development of the guidance system, particular attention should be paid to the needs of employers. Firms need assistance in knowing how to use the opportunities afforded them as a result of the Competence Reform, most especially how to document their formal and non-formal competency needs. Though the Competence Network discussed in the next section may be able to meet the needs of these firms, additional help may be required from the government.

*Special information services:* To meet the needs of disadvantaged populations, particular attention should be paid to ensuring they are aware of their rights regarding access to education via the Competence Reform. The provider community needs to ensure that support services such as day care, transportation and peer support groups are included in the mix of information services.

### **4.3 Theme 3: What is being done to improve the quality, pedagogy and variety of learning provisions?**

#### *4.3.1 Overview*

Reforms '94 and '97 have done much to improve the pedagogy in the elementary and secondary education systems. 1) The quest for quality pedagogy for adults is evident in discussions with the study associations, researchers and front line project staff. 2) NFU has had a long-standing charge to develop multimedia teaching and learning materials specifically geared towards adults. 3) Adult teaching methods were included in the framework curricula of teacher training as of 1998 in order to make future teachers in primary, lower secondary and upper secondary education more competent to teach adults. 4) VOX is to further expand research in pedagogy. 5) Clearly the move to modular curricula and the emphasis on project-based learning are to be lauded. 6) Norway is an active partner in the EuroCompetence project sponsored by the European Commission. Once again the review team was impressed with the building block approach being taken in Norway.

The Norwegian University Network for Lifelong Learning has the lead responsibility in helping colleges and universities overcome a challenge identified in an earlier OECD Country Note on Norway,<sup>11</sup> namely that university-industry partnerships, whether in R&D or education, have not been strong. Improving this situation is important for the Competence Reform. The Norwegian Council of State Colleges and Universities have established a partnership with LO, NHO, the Confederation of Vocational Unions, Confederation of Academic and Professional Unions, and the Federation of Norwegian Professional Associations. The purpose is to improve relations between tertiary education institutions and the labour market and sustain the need for system-wide innovations in teaching and learning. One important product being developed is a nation-wide course database.

This forum and others like it will be essential to more closely align the higher education system with more market-driven learning enterprises. The law also requires institutions to offer continuing education in their professions or fields of study. This task is not fully financed, so they will normally have to sell their services on the open market.

NHO and LO, despite their differences at the bargaining table, are co-operating in the development of a Competence Network to become available to member companies. Still in the beginning

---

11. The Thematic Review of Tertiary Education (OECD, 1997).

stages of development, the Network is to become an online service to improve access to and availability of learning resources that will improve workplace training and performance support opportunities. The Competence Network will give companies:

- Access to high quality education from a range of providers.
- Profitable agreements with content providers.
- Opportunities to utilise competence across companies.
- Support for the administration of training and competence development.
- A tool for assessment and documentation of competence.

If even a portion of the aims of the Competence Network are realised and companies turn to the Network as broker for these services, the goal of having a more market driven education and training system will be propelled forward.

The Competence Reform places considerable emphasis on enhancing the breadth and scope of distance learning in order to improve access and choice for adult learners. Several networks have been funded, most geared towards bringing the higher education community into the mix of adult education providers.

#### 4.3.2 *Promising practices*

A wide range of promising practices is emerging. The use of new technologies to improve the content of curricula and instructional techniques has received considerable attention. These practices are effecting the organisation of institutions, the working relationships among them, and ways of identifying and measuring the quality outputs of programmes and institutions.

#### **Box 7. Lillehammer College's Centre for Continuing Education (SELL)**

In a beautiful setting and buildings constructed for the 1994 winter Olympics, SELL noted they had the lead responsibility for testing new methods of flexible learning for KUF. They were given this assignment by the national government because of their capacity to develop coursework in multi-media forms of teaching. The Centre sees itself as new type of institution, a necessary one for higher education. They serve as a broker, arranger, manager and technical producer of products. The majority of students are those who cannot stay on campus and who attend courses part time. SELL is not responsible for the course content – this task rests with the academic faculty – but Centre staff provide technical know-how in terms of selecting the most appropriate media format (e.g. image-based, interactive, and focus on IT).

SELL is an income centre for Lillehammer College and only draws upon the institution for facility use and three staff. They provide desktop publishing for the College and manage conferences for it. They also have a collaborative agreement with institutions in the United Kingdom for managing a distance learning Masters programme.

The Centre has learned the value of what they call the Combined Studies approach. Regardless of the distance issue, they believe it is essential for students to be on campus for seminars, because students learn more and stay with courses if they can interact with instructors, organise self-study groups for follow-up and negotiate the use of media.

Another lesson is that some terms are losing their meaning, such as the difference between “vocational” and “further” education. SELL believes that the Competence Reform will drive the use of time in the learning process, thanks to asynchronous media use in academia and the workplace. There is a conviction that it will be important to institutionalise the collaboration between the brokering agent and the academic staff in a more competitive marketplace. A part of this institutionalisation includes stabilising staff funding.

### **Box 8. Network University (NVU)**

While higher education institutions will be competing in the open market place, many are collaborating through the NVU. A key strategy of NVU is to help develop the market for continuing education, with a particular focus on distance learning. They are in the process of expanding beyond the 100 plus course modules in their catalogue, of which approximately 70 per cent are computer-related subjects. Each institution is responsible for their own development of courses and providing the internal infrastructure within their own organisation to make courses available. NVU offers for-credit (*i.e.* within limitations this means approved by the government) and not for credit courses. Within the frame of the Competence Reform legislation an institution is allowed to offer up to 30 credits without government approval. However, ordinary basic study programs courses cannot be sold in the open market, as they are free to students. Thus, when no places are available, the institutions have to charge companies for such courses.

The effort is not without its challenges. They have to find ways to support students; many are using local resource centres to arrange meetings with students. Managing the logistics of getting exams to each location is not easy. Some institutions have found that the course cannot be totally open; they had to establish start and end dates. One of the members has found that providing payment to teachers and assistants on a student head count is an attractive incentive for the instructor.

The NVU represents a solid approach for developing new networks that will become increasingly important as the institutions of higher education become more deeply involved in providing life-long learning opportunities.

### **Box 9. Norwegian School of Management**

The spectrum of adult learning private providers is very large in Norway going from small associations offering leisure courses to prestigious private schools such as the Norwegian School of Management (BI). BI is one of the largest business schools in Europe providing both undergraduate and graduate programmes. It is the third largest institution in Norway. Its sources of funds include: 11 per cent from the government; 60 per cent from students; and the rest from business. They created a new structure in 1998 and streamlined the departments, now 11 in total, and added a new focus on knowledge management. Knowledge management focuses on lifelong learning, developing partnership, co-operative ventures, modules, tailor-made programmes, group discussions, and project work.

BI has a decentralised structure, as they believe they have a social responsibility to offer a nation-wide education. The school is organised around partnering strategies to: 1) deliver programmes; 2) conduct research for businesses; and 3) use the talents of adjunct professors drawn from business. They are the only Norwegian institution having opted for the Equis (European Quality Improvement System) accreditation process. In order to promote quality, all courses must be approved internally, the adjunct faculty is trained, the same textbooks are used throughout the country, the same tests are used and two examiners are required for each course, one internal and one external. These forms of quality assurance help insure the public confidence in the degrees granted by BI.

They serve the public sector employees as well as the private firms as a school of choice for adult education with their flexible hours and tailor-made programmes for both part-time and full-time students.

#### **4.3.3 Cautions**

An overarching challenge in this area is how to create a flexible system with adequate quality assurance built in. This new flexible system must promote the workplace as a learning place; this learning site must become more developed. New scheduling schemes need to be actively pursued within education institutions as the typical school day is not sufficient or often appropriate. The heterogeneity of pupils requires flexibility in the development of individualised study programmes. Flexibility cannot become a reality without enhancing the skills of teachers, with a special emphasis on exposing them to how to use multi-media technologies and becoming coaches for adult learners. A flexible system also means finding new ways to combine funding from a variety of sources to ensure the needs of students and employers alike are fully served and the distinctions between public and private vendors are muted. The review team is aware that the framers of the Competence Reform are conscious of these challenges but felt it important

to reinforce the flexibility challenge as an issue that leaders of the system must always keep in the forefront of their work.

A concern was made by a person interviewed during the visit regarding the need to improve the capacity within secondary and upper secondary in terms of using multi-media learning methods including distance learning. Additionally, this commentator noted that more could be done to make connections between the distance learning networks that are being developed for use by higher education institutions and these lower levels of education.

An employer sounded a note of warning during a site visit that will escalate as the higher education institutions become more deeply involved in public-private partnerships. This employer has been an active collaborator with the local college and has helped develop a resource centre in the small isolated community where his facility is located. His employees cannot (or choose not to) travel to the campus, taking time from work and family. His employees, many who have been with the company for almost 40 years, constantly need new skills for his business centre in the firm to be able to compete internally within his own company as well as internationally.

His concern focused on equity of the financing scheme. Many of his employees need the same basic study programs offered on campus, free to students. The upper secondary school, close to his community has to charge NOK 55 000 for the same education and he is being charged NOK 85 000 for the same courses by the University.

Private higher education institutions and distance learning companies noted other financing issues regarding unequal competition due to the public subsidies, and for some distance learning companies there is an additional disincentive due to the fact that they cannot grant degrees. BI for example noted they wish for an equal opportunity between private and public providers: that is to have public policies that promote individual choice where the competition is centred on quality not on price. There are not easy answers to these funding issues but the voices calling attention to them will most certainly become stronger.

#### 4.3.4 *Recommendations*

*Help firms develop competence-based learning systems:* There is a need for specific strategies to help firms establish competence-based training and work processes. The sectoral level can play a dynamic role in this, in concert with the branch specific networks, to assist the all-important SMEs. Perhaps some pilot projects, in concert with AAD and the Ministry of Trade and Industry, could strengthen these connections. It is a reality that employers themselves need help in knowing how to even ask the right questions regarding skills and knowledge requirements for their own workplaces. In addition, they do not necessarily know the right questions to ask of external organisations such as schools or know how to make the right choice of education and training providers. The suggested pilots could include a focus on building the capacity within firms to conduct skills assessments and learn how to connect with providers that best meet their needs.

*Develop Cross-Institutional Quality Assurance Mechanisms:* The issues of quality assurance will need attention throughout the learning enterprise. An approach that is recognised by KUF that may have some merit for expanding as a model is that of the Standing Quality Committee of the Norwegian Association for Distance Education. That Committee has established a matrix of quality areas and factors that could be a substantive guidance for any education and training programme and would be useful in an outcome driven system. The quality area includes: 1) information and counselling; 2) course development; 3) course delivery; and, 4) organisation. The quality factors include: 1) conditions and constraints;

2) implementation; 3) results; and 4) follow-up. While these particular factors may not be the exact ones needed by other organisations, the process appears well thought out, taking into account international quality standards methodologies, and worthy of emulation throughout the institutions involved in the Competence Reform.

#### **4.4      *Theme 4: What is being done to assure policy coherence and effectiveness?***

##### *4.4.1    Overview*

The Competence Reform is only possible because a new culture is emerging that focuses on co-operation between authorities, the social partners and providers of education. This is a cause for celebration. The overarching design of the Competence Reform effort does address both vertical and horizontal strategies for a key end-user, the learner. Efforts are also underway to clarify the most appropriate strategies for employers to become active partners in the process. A key task for the next few years will be to help ensure that these same types of linkages are established between the institutional stakeholders and that governmental policies for different Ministries are appropriately aligned to fulfil the promise of the reform effort.

As discussed throughout this report, Norway is pushing forward to assure policy coherence but there remain several challenges that need to be addressed. Many of the key issues have already been addressed in other sections. Some of the challenges are to be expected. This adult education reform effort, indeed any that attempts to address life-long learning, must use the host of institutions and networks of institutions that have grown up separate from one another over a long period of time. Each has a proud and independent heritage that is not easily cast aside. Nor would it be desirable to do so. Each network has its own priorities and sense of appropriate public policy. Creating a common agenda for all of the institutions is a key design for the Competence Reform.

##### *4.4.2    Promising practices*

A core theme has been to use education and training in Norway to promote a strong economy, but there has also been a recognition that it would be highly useful to policy makers if there were a better understanding regarding what education and training tools and policies are the most effective in the promotion of a strong economy. To that end, one of the national initiatives that has been organised is a research effort to help shed light on the relationship between education and society with particular attention to the relations between school, training and value creation in working life. A key tie to binding the pieces together is to have a strong policy research and analysis agenda that asks the right questions and probes across boundaries of programmes to find answers to inform the debate and improve the services. The Research Council of Norway has helped provide such a base (Box 9).

### **Box 10. A Research Agenda (1996-2002): Competency, Education and Value Creation**

Under the aegis of the Norwegian Research Council, a six-year research agenda, funded by KUF and the Ministry of Trade and Industry is underway. A wide array of researchers are involved in various phases of the work. A project committee of the Council oversees the effort that includes representatives' key stakeholders involved with Competence Reform effort.

There are four themes of the research: 1) organisation, management and co-ordination; 2) demand, content, quality and evaluation; 3) competence and value creation in working life; and 4) technology and learning. Researchers were free to cross over the four themes. Involved researchers have ties with business, labour, the traditional adult education system, the universities and economists. Though the research is not complete there are some general findings emerging that should inform the government's further work.

Some of the work has been frustrating due to the lack of information that make it impossible to know the effects of adult learning for either the individual or the economy as a whole. The researchers also provide cautions that the Competence Reform effort must not be viewed as just one more part of education reform; it must encompass both a broad concern about equity and what must be done to ensure an efficient and flexible economy. The researches that focused on equity of outcomes for adult learners sound a warning bell that very different strategies are needed for different groups. The researchers also noted that a missing link exists in that no strong forum exists for researchers to come together with policy makers across the boundaries of Ministries.

#### *4.4.3 Cautions*

A big concern the review team identified that may make the whole Competence Reform effort a shallow house of cards relates to financing the effort. Most specifically, the limits embedded in the block grant to the counties presents a large hurdle. Up to the Year 2000<sup>12</sup> the primary source for core funding flowed through block grants to the 19 counties for upper secondary education that contained a 375 per cent rule. The 300 per cent was to cover the expenses of the upper secondary students up to the age of 19 year-olds and 75 per cent was to cover the cost of special need students and adults. The counties must also cover the expenditures for culture and health care services with the block grants. Health care costs are escalating across the country and are draining away resources to realise stated goals of the Competence Reform.

No county was spending the full 75 per cent on adults and special need students. Indications are that some counties were not even meeting the letter of the law; that is providing opportunities for adults to have access to upper secondary education. In many instances, even if the requirements were technically met, the services are only offered within the same classrooms with the regular students during day time hours, clearly not a practice that will allow the full measure of the Competence Reform to be realised. Arrangements are not normally based upon what is known to be important for adults to motivate them to return to schooling, *e.g.*, flexible hours, peer support groups, flexibility in course offerings, and promotion of learning in the workplace.

Examples abound regarding the problem. In the Oppland county example cited under Theme One, the county education officials believe that they have capped out on the amount of funds they can give to adult education (within the 375 per cent formula, they are spending about 357 per cent). At the municipal level, an adult education centre, with several special need students and a large number of immigrants, has received no additional funds for some years though the student adult population has doubled. The director asserts that the funds received for educating immigrants are helping to pay for local reform for lower secondary and elementary Norwegian adult students. While this school would like to open in the evenings it cost 30 per cent more for teachers in the evening.

---

12. Beginning in August 2000, KUF altered the financing scheme based on the right for adults to obtain an upper secondary education and provided a "capped" amount of funds to provide coverage to an increased number of adults.

The lack of clear-cut fiscal support from other Ministries is a concern. Reductions of funding for active labour market programmes in strong economic times is understandable, but why some of these funds were not redirected to enhance the Competence Reform agenda is unclear. There is a paradox: the labour market authorities are spending less for skill acquisition when the education authorities are spending more for the Competence Reform – at least for the initial start-up period. A local example regarding cutbacks in funding from the Ministry of Health and Social Services as well as the Ministry of Labour has placed a heavy strain on the Resource Centre in Mosjøen.

Even though the unemployment rate is low, jobs are being lost in the oil and gas-extracting sector. There are problems of the shipyards and supply industries caused by the drastic drop in investment in the offshore oil sector. However, workers are rather easily transferred to other jobs, as there are labour shortages in other industries and regions. There are also labour shortages in other occupations, particularly in health care. More involvement of the Ministry of Trade and Industry and AAD are required if the Competence Reform is to help promote the economic effectiveness of the overall economy. There is a lack of evidence that adequate connections are being made between the work of the Ministry of Trade and Industry in the regions and/or sectors with that which is underway within the education-supported efforts. A synergy is needed between the regional and industry specific initiatives of that Ministry, particularly as it relates to building more involvement of SMEs. There is also lack of evidence that PES has refined their core policies in order to promote the far-reaching implications of the Competence Reform.

It is not possible for the review team to provide specific suggestion about how these resource issues can be settled, as we lack both information and sufficient context. However, after the initial capacity building funding dissipates, these issues, unless addressed, will remain and need to be revisited.

#### 4.4.4 Recommendations

*Continue Formal Research:* The review team would hope that a forum would be created to share the results of the Research Council's work across several Ministries and that consideration be given to supporting further research with support from more than just the two which funded the 1996-2002 phase of work. There will be an ongoing need to reconcile social returns, economic returns and private returns as a result of the Competence Reform, but none of this can be done without the evaluation and funding of research that can flow from such analysis. At some point, an analysis of the contradiction between the goals of the Competence Reform and the promotion of early retirement will need to be addressed. This is an example of potential contradiction between social returns in the long run, and economic returns and private returns in the short run.

*Develop Outcomes Driven Implementation Goals:* If the adult education system is going to be driven by the needs of the end users (adult learners and employers) then integration of services from a wide array of service providers and funding sources is essential. For the review team, this is the essence of a publicly supported market driven system, and consequently, an indirect effect of the Competence Reform. Such integration requires the overall system to be outcome driven, not rule and regulation laden. What is still needed is to refine the infrastructure so that both old and emerging institutions are allowed to operate based upon common outcomes, quality assurance strategies, compatible reward incentives, and institutional neutral (*i.e.* public, private, non-profit) fiscal support policies.

A good starting point is to develop outcome driven implementation goals. The national government has already moved to a system of performance based planning based upon the recognition that it is not possible to dictate the details of the outcomes. The national policy goals, that are well documented for the Competence Reform, need to be augmented with "implementation goals" in order to develop common performance expectations from which local communities, regions and the institutions within it

develop the appropriate strategies to meet those goals. The Competence Reform has been launched and designed in Oslo and is linked to a very centralised wage agreement between the social partners, stakeholders in the reform, with the unions the leading force. What must occur is to find the most effective means to implement it throughout the very decentralised structure of Norway.

For the Competence Reform effort, the national government can begin the process by first undertaking a thorough review of all relevant Ministries strategies, programmes, rules, regulations and variations in local practice if these variations are not aligned with the Competence Reform goals. For institutions it should focus on what incentives or disincentives exist in rule or practice that minimise collaboration and melding of resources across institutional boundaries. The review should identify the disincentives as well as the incentives for individuals to participate, *e.g.* the question of income support while participating in education and training. The review should also address the needs of employers and analyse the particular needs of each sector.

The specific objectives of the reform have not yet been firmly articulated, nor will it be easy to do so due to the enormous variety and range of issues that need to be addressed, including:

- Type of competencies needed – ranging from the need to read and write to high-skilled sector or firm specific competencies on the part of individuals.
- Determining the form of documentation about non-formal learning that will be useful to the two primary consumers – employers and higher education institutions.
- Type of support structure needed by individuals in order for them to take advantage of the opportunities allowed in the new Education Act.
- Varying needs of enterprises, by sector, size, market conditions, *etc.*
- Support systems needed to assist people, providers of education services and enterprises (*e.g.* information, guidance and counselling).
- Appropriate financial incentive mix for people, providers of education services, enterprises and other organisations such as brokering organisations like the resource centres.
- Altering the rules and/or traditions (private or governmental) that dictate the practice of public, private education and providers and company-based training to all become a part of a market driven system.

The completion of such a task cannot be achieved quickly or easily. Not counting the teaching staff housed in SRV, the relatively small staff of VOX that is to assume a key role in implementing the Competence Reform will need to be supplemented by other Ministries and the social partners.

*Provide Cross-agency Incentive Grants:* Consideration might be given to providing small incentive rewards for counties and institutions that meet or exceed cross-agency performance expectations via a common pool from all of the Ministries. This suggestion is made because it is clear the counties are often viewed with suspicion from those concerned about the needs of adults. Another opportunity exists to emulate the Mosjøen example of allowing organisations to carry forward at least some of the funds that have not been spent at the end of the fiscal year. Such an approach would help stimulate a more market driven environment.

*An evaluation strategy is needed:* A comprehensive evaluation effort, that of necessity will be complex to develop and manage, will be important to launch to assess the results of the Competence Reform. The results of the research, discussed earlier, can inform the design of that evaluation but more will be needed. Designing an evaluation presents a clear need to have specific objectives about what is expected of the different institutions and what are the short and long-term outcomes for adults that are desired.

The evaluation process needs to address both quantitative and qualitative terms. Qualitative issues include the fact that statistics on adult learning are not well developed. There is little evidence of any consensus on the figures of the number of adults concerned or the specific target populations. Hard facts are difficult to establish regarding how many individuals need the services as no firm figures exist concerning the number of adults lacking basic education. Nor is there information on how much is spent and who receives the benefits of company-based competence development. Also no agreed upon numbers exist, particularly for the SMEs.

For the quantitative component, it would be prudent to review current statistical programmes to ensure that the necessary information will be collected. There are not enough statistics and/or analysis of the individual effects of adult learning; therefore information is needed about the effects of participating in adult learning for both low-skilled workers as well as high-skilled workers. Consideration should be given to establishing a national panel of individuals and a control group for comparative purposes to track, through administrative data, the effect of adult learning in different situations (such as employed, unemployed, not in the labour force) by occupation, industry, region, *etc.* With such a panel it should be possible to assess externalities such as effects of training on colleagues or “poaching effects”.

Qualitative issues need to be addressed as well, such as behaviours, bottlenecks, value and use of information networks, *etc.* Both types of information will be needed to sustain support as well as modify the design and implementation strategies of the Competence Reform effort over the long term.

## **5. CONCLUSIONS**

Norway is well positioned to place adult learning in the most positive policy and practical context. It was easy to identify, within each of the themes OECD has highlighted for study, important progress. The favourable conditions of a very tight labour market, low population density, and the strong tradition of support for education and training all contribute to this encouraging situation. Norway has launched the Competence Reform effort, in part, because of these factors but they are continuing to wrestle with the implications of melding education and labour market policies together in meaningful ways.

Norway’s approach to phasing in the different components of the Competence Reform as well as undertaking a set of specific R&D activities is certainly prudent. Much of the research and development funds allocated to help launch the effort over the next few years are fittingly being used to support the one-time investment to develop new tools (*e.g.* distance learning networks, documentation of non-formal competencies, *etc.*).

## 5.1 Recommendations

In Section 4 there were recommendations made under each of the major themes addressed in this OECD review. The highlights of those recommendations are provided in the Box below.

### **Theme 1. Improving Incentives and Motivation for Adults to Learn**

*Targeted research:* During the experimental stage the review team believes it would be prudent to specifically allocate funds for projects directed towards learning more about how to motivate and prepare individuals with learning disabilities.

*Track results in higher education regarding treatment of non-formal assessments:* The evaluation plan and information management systems need to specifically track the different strategies being employed by different institutions of higher education to assess the most effective ways to promote access to appropriate post-secondary learning opportunities for adults.

### **Theme 2. Promoting Integration to Provide Opportunities for Adults to Learn**

*Focus demonstrations on use of the workplace as learning organisations:* Developing flexibility in the system to accommodate the realities of the workplace is essential.

*Develop a comprehensive information system:* A key priority for the new organisation in implementing the Competence Reform is to develop quality information systems that meet the needs of adults (with special attention given to reaching out to the disadvantaged populations), employers, institutions and national policy makers.

*Guidance and Counselling services need enhancements:* The need for a substantially enhanced guidance and counselling system is evident. It is clear that no one agency “owns” this responsibility and there is not adequately trained staff in the schools to help adults, and all students, to become aware of all the options that may be open to them. Employers need other types of guidance counselling services in order to be full participants in the overall effort.

### **Theme 3. Improvement of Quality, Pedagogy and Learning Provisions**

*Help firms develop competence-based learning systems:* In order to assist firms, multiple Ministries and private sector institution's engagement and support is needed.

*Develop Cross-Institutional Quality Assurance Mechanisms:* The issues of quality assurance will need attention. KUF will need to engage all relevant Ministries and the key public and private stakeholders in the development of new forms of quality assurance that recognise the need for flexible arrangements, but high quality processes and products.

### **Theme 4. Promotion of Policy Coherence**

*Continue Formal Research:* A forum should be created to share the results of the Research Council's work across several Ministries and consideration should be given to supporting further research with support from more than just the two which funded the 1996-2002 phase of work.

*Develop Outcomes Driven Implementation Goals:* If the adult education system is going to be driven by the needs of the end users (adult learners and employers) then integration of services from a wide array of service providers and funding sources is essential. A good starting point is to develop outcome driven implementation goals. The national government can begin the process by first undertaking a thorough review of all relevant Ministries strategies, programmes, rules, regulations and variations in local practice if these variations are not aligned with the Competence Reform goals.

*Provide Cross-agency Incentive Grants:* Consideration should be given to providing small incentive rewards for counties and institutions that meet or exceed cross-agency performance expectations via a common pool from all of the Ministries.

*An evaluation strategy is needed:* A comprehensive evaluation effort, that of necessity will be complex to develop and manage, will be important to launch to assess the results of the Competence Reform and needs to address both quantitative and qualitative terms.

## 5.2 *Final observations*

The success of present initiatives, Competence Reform in particular, hinges on many “ifs” concerning financing and resources. The most important is if other ministries and the social partners are fully involved in the endeavour. It appears that public budget decisions continue to be made without regard to negative impacts on adult learning opportunities. KUF is hardly in a position to dictate budget decisions by other ministries, yet no other ministry shows evidence of taking learning needs fully into account. The social partners, though receptive, still have not fully engaged in working through the implications of expanded adult learning through the industrial relations system, and the collective bargaining process in particular. There are not yet signs of a genuine debate on who should pay, or what incentives and enabling mechanisms are needed. In the view of the review team, this is because there is not yet full appreciation for the resource implications of Competence Reform and other initiatives, or for the need to reconsider whether the past allocation of financing burdens will be suitable for the future. Although there are good intentions and good will, there is still lacking visible evidence of concerted action.

The legislation and the initial implementation plans contain many of the core components to address the two pillars of the reform – a basic education for all adults and updating of the workforce. For the first pillar: a statutory right to three years of upper secondary education; module-based learning; Section 20 (3.5) programmes; fiscal incentives to take advantage of education; and documentation of non-formal learning. For the second pillar: workplace oriented learning; net-based learning; module-based learning; study leave; and promotion of fiscal incentives within the workplace are all possible. In other words, the ingredients are there, or will be there if and when the wage-bargaining process establishes the necessary foundation for much of the second pillar.

There are potential contradictions between equity and efficiency objectives, an inclusive reform and a targeted reform linked to the labour market, which will generate tensions in this new initiative. Concerning the first pillar -equality of outcomes- a part of the tension will be due to the fact that adults are heterogeneous. They do not have the same needs and do not react to the same incentives. It is possible that more attention and support services will need to be given to the most at risk part of the populations needing basic education. Thus, the question of whether the financing schemes (block grants *et al.*), discussed in Section 4.4 will be adequate to insure the first pillar is appropriately financed arises. Regarding the second pillar – efforts to promote efficiency in the labour market generate other questions. Much has been made of the power of the study leave as the core strategy to meet this desired outcome. It is unclear as to whether or not more emphasis should be placed on the other strategies that were provided in the new legislation (such as module-based learning and other forms of workplace oriented learning). Also, the issue of documentation of non-formal learning being based on education criteria pegged to the upper secondary education level and none on more in-depth workplace standards may not serve the overall initiative well over the long run.

What does not yet exist is an education market driven system that encourages institutions to serve those needing the front end and sometimes-high support services to attain the foundation competencies. As discussed in Section 4.4, the current block grant financing schemes are more likely to discourage aggressive promotion of ensuring equity and access for certain parts of the adult learner population. At the higher end of the educational institutional queue, the rules of the state generate many of the impediments to creating a more cost effective and efficient education market. For example, the public colleges and universities are still driven by time-based rules (*e.g.* semesters, courses, how credits are counted *etc.*) not a competency-driven flexible system. Also, the rules that protect some institutions by not allowing others to grant degrees or providing the fiscal incentives to students to select public institutions rather than promoting an open-market place for all institutions to compete, all conspire against a market driven system designed to meet the needs of adults and employers alike.

The proposed mix of strategies to ensure both equity and economic feasibility substantially hinges, in many ways, on the accreditation of non-formal learning. If accomplished with the right mix of standardisation and flexibility, this accreditation can become a great equaliser. The standardisation is needed in order to promote legitimacy in the marketplace. Administrative ease in the documentation process is essential but as noted earlier there are many questions that arose in the visit that need to be reviewed during the R&D phase. The goals of documentation of non-formal education: to motivate people to learn; to have more tailor-made education; and to encourage continuous development of qualifications are all laudable. For this new tool to have power it needs to be used in ways that encourage the educational institutions to be more flexible, to have more tailor-made programmes, to adjust their assessment of knowledge, and to shorten the time required to acquire formal credentials. Simultaneously, the tool must add value in the workplace. Employers must see the results through increased productivity and workers through fiscal rewards. Being able to document the benefits, via a vibrant knowledge-based economy, must be the overarching reward for Norway.

Norway is to be commended for beginning this long journey, called Competence Reform. Other countries will learn much from this bold effort.

## GLOSSARY

AAD	Ministry of Labour and Government Administration
AOF	Workers' Educational Association of Norway
BI	Norwegian School of Management
CEDEFOP	European Centre for Development of Vocational Training
GDP	Gross Domestic Product
IALS	International Adult Literacy Survey
ICT	Information and Communication Technologies
IT	Information Technologies
KUF	Ministry of Education, Research and Church Affairs
LO	Norwegian Confederation of Trade Unions
NFU	Norwegian State Institution for Distance Education
NHO	Confederation of Norwegian Business and Industry
NVI	Norwegian Institute of Adult Education
NVU	Network University
R&D	Research and Development Activities
SELL	Lillehammer College's Centre for Continuing Education
SIALS	Second International Adult Literacy Survey
SMEs	Small and Medium sized Enterprises
SRV	State Adult Education Centre

## BIBLIOGRAPHY

AAD (1998), *Annual Report*, Oslo.

KUF (2000), *Background Report – Thematic Review on Adult Learning*, Oslo.

OECD (2000a), *OECD Economic Surveys - Norway*, Paris.

OECD (2000b), *Education at a Glance*, Paris.

OECD (2000c), *Employment Outlook*, Paris.

OECD (1998), *Thematic Review of the Transition from Initial Education To Working Life – Country Note on Norway*, Paris

OECD (1997), *Thematic Review of Tertiary Education – Country Note on Norway*, Paris

OECD and US DEPARTMENT OF EDUCATION (1999), *How Adults Learn*, a Conference held April 6 – 8, 1998, Georgetown University Conference Centre; Washington DC; Paris and Washington.

**ANNEX 1**  
**Steering Group, Background Report Author and Co-ordinator**

**Steering Group**

*From the Ministry of Education, Research and Church Affairs (KUF):*

Mr. Petter Skarheim, Director General, Department of Adult Education

Ms. Hanna Marit Jahr, Director General, Department of Primary and Lower Secondary Education

Mr. Ole Briseid, Director General, Department of Upper Secondary Education

Mr. Jan S. Levy, Director General, Department of Higher Education

Ms. Kari Østvedt, Deputy Director General, Department of Higher Education

Mr. Olav Vaagland, Deputy Director General, Department of Adult Education

Ms. Marit Viggen, Adviser, Department of Adult Education

*From the Ministry of Labour and Government Administration (AAD):*

Ms. Åse Rellsve, Senior Adviser

**Background Report Author**

Ms. Fride Tangen

**Co-ordinator**

Ms. Marit Viggen, Advisor, KUF (<http://www.kuf.dep.no>)

**ANNEX 2**  
**OECD Review Team**

Ms. Mia Douterlungne  
Hoger Instituut voor de Arbeid (HIVA)  
Katholieke Universiteit Leuven (KUL), Belgium

Mr. Jean-Louis Kirsch  
Centre d'études et de recherches sur les qualifications (CEREQ)  
Marseille, France

Ms. Anne Sonnet  
Employment Analysis and Policy Division  
Directorate for Education, Employment, Labour and Social Affairs (DEELSA)  
OECD, Paris, France

Mr. Patrick Werquin  
Education and Training Division  
Directorate for Education, Employment, Labour and Social Affairs (DEELSA)  
OECD, Paris, France

Ms. Joan Wills (Rapporteur)  
Institute For Educational Leadership (IEL)  
Washington, D.C., the United States

**ANNEX 3**  
**Programme of the visit**

**Wednesday 15 March – Oslo**

- 09:00      *Meeting with the Steering Group in the Ministry of Education*  
Discussion of Background Report  
From the Ministry of Education, Research and Church Affairs  
Mr. Petter Skarheim, Director General, Department of Adult Education  
Ms. Hanna Marit Jahr, Director General, Department of Primary and Lower Secondary Education  
Mr. Ole Briseid, Director General, Department of Upper Secondary Education  
Mr. Jan S. Levy, Director General, Department of Higher Education  
Ms. Kari Østvedt, Deputy Director General, Department of Higher Education  
Mr. Olav Vaagland, Deputy Director General, Department of Adult Education  
Ms. Marit Viggen, Adviser, Department of Adult Education  
From the Ministry of Labour and Government Administration  
Ms. Åse Rellsve, Senior Adviser  
Ms. Fride Tangen, Author of the Background Report
- 11:00      *Overview of Adult Learning in Norway* by Mr. Petter Skarheim, Director General
- 14:00      *Visit to LO: Meeting with LO (Norwegian Confederation of Trade Unions) and NHO (Confederation of Norwegian Business and Industry)*  
Social partners' involvement in adult education and training  
Mr. Anders Skatkjær, National Secretary, LO  
Mr. Erik Bråten, Project Assistant, LO  
Ms. Mona Sætrang, Assistant Director, NHO  
Mr. Helge Halvorsen, Assistant Director, NHO
- 15:00      *Meeting with Mr. Olav Hesjedal, the Norwegian Council of State Colleges and the Norwegian Council of Universities*  
Project "Norwegian University Network for Lifelong Learning"
- 16:15      *Visit to KS (Norwegian Association of Local and Regional Authorities)*  
KS involvement in adult education as employers' organisation and public school owner  
Ms. Kristin Hille Valla, Director, Competence and Development Department  
Mr. Thomas B. Scheen, Senior Executive Officer, Competence and Development Department

## **Thursday 16 March – Oslo**

- 09:00 *Visit to the Directorate of Labour*  
Labour market training  
Mr Roger Lorås, Assistant Director General  
Mr. Hans Kure, Assistant Director General  
Ms. Ingunn Hagen Hoff, Higher Executive Officer  
Mr. Magne Løwe, Telemark County Office  
Ms. Bente Øverli, Adviser, Ministry of Labour and Government Administration
- 11:00 *Meeting with NAAE (Norwegian Association for Adult Education) and member organisations*  
Ms. Ellen Stavlund, NAAE  
Ms. Astrid Thoner, NAAE  
Mr. Tom Runar Hansen, Workers' Educational Association  
Mr. Ole Jørgen Woltmann, Conservative Party's Study Association  
Mr. Wilfred Werner, Folk University
- 12:00 *Meeting with representatives from folk high schools*  
Mr. Øyvind Brandt, Director, Folk High School Information Office  
Mr. Tor Grønvik, Director, Norwegian Association of Church-Affiliated Folk High Schools  
Mr. Arild Mikkelsen, Executive Officer, Norwegian Association for Adult Education  
Mr. Odd Arild Netland, Director, Folk High School Council  
Mr. Jostein Nilsen, Principal, Sagavoll Folk High School  
Mr. Thor Østby, Principal, Norwegian Academy for Senior Citizens
- 14:00 *Visit to the State Adult Education Centre (SRV)*  
Ms. Turid Kjølse, Principal, SRV  
Ms. Ingjerd Oudenstad, SRV  
Mr. Jan Henry Næss, SRV, Upper secondary education for adults  
Ms. Frida Tangen, The Norwegian State Institution for Distance Education (NFU)  
Ms. Marianne Løkholm Lewin, SRV, documentation of non-formal learning  
Mr. Jan Sørli, SRV, New adult education institution  
Mr. Tom Sørhus, SRV

## **Friday 17 March – Sarpsborg (in Østfold County)**

- 10:05 *Met and accompanied all day by*  
Ms. Berith Bergersen, Workers' Educational Association  
Mr. Henning Knutsen, Workers' Educational Association
- 10:30 *Visit to Day High School, run by Workers' Educational Association*  
Training for groups at risk  
Mr. Helge Sollie, Leader  
Teachers and students

- 12:00 *Visit to enterprise: Borregaard Ind. Ltd.*  
 Mr. Ingar Johansen, Training Leader  
 Mr. Aage Andersen, Trade Union Leader  
 Mr. Arild Hagen  
 Mr. Øyvind Myhre
- 14:00 *Visit to "Reading and Spelling Shop" in the town centre*  
 Training for adults with reading and writing problems  
 Mr. Rolf Johansen, Leader  
 Mr. Svein Larsen, Teacher  
 Students

**Monday 20 March – Lillehammer (Oppland County)**

- 09:00 *Visit to Lillehammer Adult Education Centre*  
 Primary and lower secondary education for adults  
 Training for immigrants in Norwegian and social studies  
 Ms. Ellen Lund, Principal  
 Ms. Anne Britt Sandvik, Teacher  
 Mr. Mohammed Osman Yusuf, Student
- 11:00 *Visit to National Education Office, Oppland*  
 Upper Secondary Education for Adults  
 Project "Documentation of Non Formal Learning"  
From the National Education Office  
 Mr. Knut Aagesen, Director  
 Mr. Tore Pettersen, Project Manager  
 Mr. Kjell-Esben Langset, Adviser  
From Oppland County Authorities  
 Mr. Oddbjørn Snøfugl, Head of Education Office  
 Ms. Liv Dalheim, Education Office
- 14:00 *Visit to Lillehammer College, Centre for Continuing Education*  
 Flexible learning methods and distance education  
 Admission of students on the basis of non-formal learning  
 Training programs for public enterprises  
 Mr. Kjell Ivar Iversen, Director

**Tuesday 21 March – Trondheim (in Sør-Trøndelag County)**

- 09:00 *Meetings at the Norwegian University of Science and Technology (NTNU)*  
 Continuing education and training – plan and strategy  
 Mr. Svein Lorentzen, Professor  
 Mr. Jon Walstad, Assistant Director General

- 11:00 *Sør-Trøndelag College: Continuing education and training, "Network University"*  
 Mr. Thorleif Hjeltnes, Associate Professor, Prorector  
 Mr. Knut Munkebye, College lecturer, Head of Computer Engineering Department  
 Mr. Geir Maribu, Associate Professor, Inspector on Open and Distance Learning
- 14:00 *Ytre Namdal Upper Secondary School*  
 Co-operation between educational institutions at different levels and industry  
 Mr. Karl Mikalsen, Head of Marketing and Development  
 Ms. Annemor Korsnes, Head of Department  
 Mr. Bjørn Ola Holm, Head of Department, Telenor Mobil
- 16:00 *Demonstration of models of internet-based training*  
 Mr. Arvid Holme

### **Wednesday 22 March – Mosjøen (in Nordland County)**

- 09:00 *Visit to Mosjøen Resource and Competence Centre (MRK)*  
 Labour market training  
 Mr. Svein Severinsen, Head of MRK  
 Mr. Kurt Henriksen, Principal, Vefsn Upper Secondary School  
 Mr. Geir Solli, Teacher, Vefsn Upper Secondary School  
 Ms. Inger Lise Pettersen, Project "Documentation of non-formal learning"  
 Mr. Per Inge Dalheim, Mosjøen Labour Market Office
- 13:00 *Visit to enterprise: Elkem Aluminium Mosjøen*  
 Mr. Torbjørn Jørgensen, Head of Administration

### **Thursday 23 March – Oslo**

- 09:00 *Meeting with NADE (Norwegian Association for Distance Education and Member Institutions)*  
 Mr. Sigmund Kristoffersen, President NADE and Rector of FB Distance Education  
 Ms. Ingeborg Bø, NADE, Executive Director  
 Mr. Torstein Rekkedal, NKI, Director for Research and Development  
 Mr. Jan B. Ommundsen, NKS, President and Ced
- 10:00 *Meeting with Mr. Jan Fr. Lockert, Deputy Director General, Ministry of Trade and Industry and Mr. Olav Bardalen, Head of Section, Norwegian Industrial and Regional Development Fund (SND)*  
 Funding of competence building in enterprises
- 11:00 *Visit to BI (Norwegian School of Management), Executive School*  
 Training for leaders in private and public enterprises  
 Mr. Odd M. Reitevold, Vice President, Executive Education  
 Ms. Anne Solvang Hoff, Vice President, Director of Studies, Master of Management  
 Mr. Dag Aadne Sandbakken, Director of Studies, Undergraduate Programmes

14:00 *Meeting with research institutes and researchers*  
Ms. Heidi Engesbak, Norwegian Institute of Adult Education (NVI)  
Ms. Liv Finbak, Norwegian Institute of Adult Education (NVI)  
Mr. Sveinung Skule, Institute for Applied Social Science (FAFO)  
Mr. Erik Bruse, Centre for Economic Analyses (ECON)  
Mr. Knud Knudsen, Research Programme "Competence, Education and Value Creation" (KUV)  
Ms. Ellen Brandt, Norwegian Institute for Studies in Research and Higher Education (NIFU)  
Mr. Oddbjørn Raaum, Frisch Centre  
Mr. Karl Johan Skårbrevik, Møre Research

**Friday 24 March – Oslo**

09:15 *Meeting with Mr. Trond Giske, Minister of Education*

10:00 *Meeting with Statistics Norway (SSB)*

Mr. Terje Risberg, Section for Population and Education Statistics  
Mr. Helge Nesheim, Section for Labour Market Statistics

11:00 *Meeting with the Steering Group*

Discussion of proposal for Country Note

From the Ministry of Education, Research and Church Affairs

Ms. Hanna Marit Jahr, Director General, Department of Primary and Lower Secondary Education

Mr. Jan Ellertsen, Deputy Director, Department of Upper Secondary Education

Ms. Kari Østvedt, Deputy Director, Department of Higher Education

Mr. Olav Vaagland, Deputy Director, Department of Adult Education

Ms. Marit Viggen, Adviser, Department of Adult Education

From the Ministry of Labour and Government Administration

Ms. Christine Nordhagen, Principal Officer

Ms. Frida Tangen, Author of the Background Report