

# **DEVELOPMENT AND STATE OF ART OF ADULT LEARNING AND EDUCATION (ALE)**

## **National Report of Estonia**

by

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Haridus- ja Teadusministeerium

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## I General Overview

Estonia is one of the smallest countries in Europe, both in area (45,200 km<sup>2</sup>) and population (1.34 million – 2007). Population density is rather low, as 64% of the population lives in the cities (see table 3). Forests and marshes cover more than 60% of the territory. Throughout centuries, Estonians have always lived in the corner of the world where there is a large-scale migration of peoples. The Estonian language contains loan words from low German, Swedish, Russian, French, Finnish and English. Those travelling through or those who have come here by chance, have doubtlessly left their imprint on the Estonians' way of thinking and their character.

Estonia is situated on a busy trading route between East and West and has always had excellent ports; foreign trade and transit are therefore ever increasingly important for the Estonian economy.

### General Information:

- **Population:** 1.34 million
- **Population density:** 31 people per km<sup>2</sup>
- **Capital:** Tallinn
- **Area:** 45,227 sq km (17,462 sq km)
- **Major languages:** Estonian, Russian
- **Major religion:** Christianity
- **Life expectancy:** 65 years (men), 77 years (women) (UN)
- **Main exports:** Machinery, textiles, wood products
- **GNI per capita:** US \$ 9,100 (World Bank, 2006) (US \$11 600, 2007)

Because of the negative birth rate, Estonian population is constantly reducing.

Table 1 Estonian population 2007.

	Total	Estonians	%%	Non-Estonians	%%	Adult population 15 - 74	%%
<b>Total</b>	1 342 409	921 062	68.6	421 347	31.4	987 826	73.6
<b>Men</b>	618 245	429 298	46.6*	188 947	44.8**	489 122	49.5***
<b>Women</b>	724 164	491 764	53.4*	232 400	55.2**	498 704	50.5***

\* %% from Estonians; \*\* %% from non-Estonians; \*\*\* from aged 15-74

Source: Estonian Statistics

Estonians are the native population in Estonia, but in the group of other than Estonian ethnic origin there are many different nationalities living in Estonia, most belonging to the Russian-speaking minority (see table 2). Almost 2/3 of the population is living in cities (see table 3).

Table 2 Distribution of population by language and ethnic group in 2007

Total	Est. %%	Rus. %%	Ukr. %%	Belr. %%	Finn %%	Tatr %%	Latv. %%	Pol. %%	Lith. %%	Jew %%	Ger. %%	Oth. %%
100	68.6	25.7	2.1	1.2	0.8	0.18	0.16	0.15	0.15	0.14	0.14	0.68

Source: Estonian Statistics

Table 3 Distribution of population between urban and rural areas in 2007

	Total number	%%
<b>Total population</b>	1 342 409	
<b>Cities</b>	866 448	64.54%
<b>Rural areas</b>	475 961	35.46%

Source: Estonian Statistics

### Employment situation

In 2006 among people aged 15–74, there were 646.3 thousand employed, 40.5 thousand unemployed and 362.3 thousand inactive people in Estonia. As result of rapid economic growth (11.2%), the employment rate (15–64) in 2006 increased to 67.7% of the working population (the corresponding indicator in 2005 was 64%). As expected, the unemployment rate (15-64) decreased from 7.9% in 2005 to 5.9% in 2006. Positive developments in the labour market make it feasible to achieve a 70% employment rate by 2010.<sup>1</sup>

As in most of the European Union member states, the Estonian population is also reducing and aging, which in the near future will bring about problems related to labour supply reduction.<sup>2</sup>

Under the situation where structural labour market problems exist, the availability and use of lifelong learning, incl. continuing education and retraining is essential. The share of adult

<sup>1</sup> Action plan for Growth and Jobs 2005-2007 for the implementation of the Lisbon Strategy. Progress report for 2007, p. 29.

<sup>2</sup> Operational Programme for Human Resource Development, p. 59

learners in Estonia has been too low – according to the survey in 2006, only 6.5% of people 25-64 participated in adult education. People have low motivation for participating in lifelong learning, insufficient knowledge or awareness or unfavourable opportunities for participating in it.<sup>3</sup>

**Education in Estonia** is highly valued among the society members and its prestige has increased. Proceeding from that, the average level of education and erudition is relatively high, e.g. it can be characterised by the share of workers with at least secondary education in the age group 25-64. It is even better characterized by the high number of people who are acquiring higher education: when in 1994/95 academic year the total number of students was 25,483 then in 2005/2006 already a total of 68,287 students were studying (46% of them on state commissioned student places). In addition, the high level of foreign language skills and relatively high ICT skills can be pointed out. Due to these aspects, one of the characteristic features of the Estonian society is the relatively high flexibility of its members, which allow us to remain competitive in globalising and fast changing economic environment and develop as a society. The individuals, dynamic business sector and the state system are able to adapt to the changing situation with a little delay – decision processes are relatively fast as is suitable for a small country and approval processes are short. Estonians are open primarily to new ideas and technologies.<sup>4</sup>

The educational level in Estonia is quite high (see table 4). In 1999, 51.2 percent of population had secondary level education (general or vocational) and 18.0 percent tertiary education (academic or applied higher education). The educational level of women was higher than that of men, especially in the middle/secondary level.

Table 4 Educational level in Estonia 1999

<b>BASE=1005</b>	<b>Total %</b>	<b>Male %</b>	<b>Female %</b>
<b>Lower</b>	30.8	36.2	26.4
<b>Middle</b>	51.2	46.4	55.2
<b>Upper</b>	18.0	17.4	18.4
<b>Total</b>	1005 (100%)	455 (100%)	550 (100%)

Source: [www.europeanvalues.nl](http://www.europeanvalues.nl)

As could be seen in table 5, the educational level in Estonia is higher than that of the neighbouring countries Latvia and Finland. Still, the figures show the trend that the number of learners on the lower level is growing, and on the upper level diminishing.

<sup>3</sup> Estonian National Strategic Reference Framework (NSRF) 2007–2013, p. 49.

<sup>4</sup> Estonian NSRF 2007–2013, p. 48.

Table 5 Level of education in Estonia compared to Finland and Latvia

BASE=6264	Estonia [1996]		Estonia [1999]		Finland [1996]		Finland [2000]		Latvia [1996]		Latvia [1999]	
	n	(%)	n	(%)	n	(%)	n	(%)	n	(%)	n	(%)
Lower	216	21,2	310	30,8	401	40,6	580	55,9	139	11,6	234	23,1
Middle	582	57,0	515	51,2	476	48,2	308	29,6	692	57,7	597	58,9
Upper	223	21,8	181	18,0	94	9,5	128	12,3	369	30,8	174	17,2
Don't know	0	0,0	0	0,0	16	1,6	0	0,0	0	0,0	0	0,0
No answer	0	0,0	0	0,0	0	0,0	23	2,2	0	0,0	8	0,8
<b>Total</b>	<b>1021</b>	<b>100</b>	<b>1005</b>	<b>100</b>	<b>987</b>	<b>100</b>	<b>1038</b>	<b>100</b>	<b>1200</b>	<b>100</b>	<b>1013</b>	<b>100</b>

Source: [www.europeanvalues.nl](http://www.europeanvalues.nl)

Table 6 Educational level of different age groups in 2004

Level of education	Age groups					
	15-24	25-34	35-44	45-54	55-64	65-74
	%	%	%	%	%	%
First level	53	11	5	9	21	44
Second level	42	61	62	55	50	35
Third level	6	28	32	36	29	21
including vocational secondary education on the basis of secondary education	2	9	11	14	12	5
Higher education	4	19	21	22	17	16
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Competitiveness and Educational Needs of Older Employees, p.16

Compared to 1997, the number of people with higher education who are actively employed in Estonia has grown by 30 000. According to the Estonian Statistical Office, in order to preserve the educational level of the population, and to improve the educational level of the specialists, it is necessary to ensure at least 8000 first time graduates per year. This level was reached for the first time in the 2002/03 academic year. Compared with the size of the population, it can be said that whereas in 1980 there were 173 learners on the higher education level per 10 000 people, and 275 on the vocational education level (incl. 162 in secondary specialty study), then in 2005 higher education was acquired by 507, and vocational secondary education by 215 learners per 10 000 people. The proportion of those acquiring vocational education has remained approximately at the same level, but the proportion of those acquiring tertiary education has grown considerably. In the period 2006-2016, the 16-18 year old age group will decrease by almost 60% and in addition to a shortage of specialists with vocational education, Estonia will also face a reduction in the number of new specialists with higher education entering the labour market. Therefore, the possibility to continue studies on the higher education level, for those who once quit higher

education, and for working people with secondary or vocational education, will become increasingly important. Studying part-time mean that the existence of various study forms (inc. e-learning) will become important. Adult learners also have different expectations regarding study and teaching methods, and the content and goals of study.<sup>5</sup>

As could be seen from table 7, educational level of Estonian population is constantly growing, especially on tertiary level. When comparing men and women, it is obvious that educational level of women is higher than that of men on tertiary level, when men is ahead of women on primary and secondary level education.

Table 7 Educational level of the Estonian population age 25-64

Age group / year	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>25-64</b>											
<b>Total</b>											
Primary education or lower	17.5	16.5	15.7	14.4	13.1	12.5	11.7	11.3	11.1	11.7	11.1
Secondary education	52.5	53.8	55.5	56.7	56.8	57.1	57.8	57.4	55.7	55.1	55.7
Tertiary education	30.0	29.8	28.8	28.9	30.1	30.4	30.6	31.3	33.2	33.2	33.2
.. secondary education after secondary education	11.8	11.4	10.9	11.4	11.7	11.4	11.5	11.3	10.8	10.4	10.7
.. higher education, master' and doctoral degree	18.2	18.3	17.9	17.6	18.5	19.0	19.1	20.0	22.4	22.8	22.5
<b>Men</b>											
Primary education or lower	18.6	17.7	16.9	16.0	14.4	13.9	13.3	12.9	13.1	14.3	13.3
Secondary education	57.2	58.8	60.7	61.8	61.9	62.2	62.6	62.4	59.8	58.5	60.7
Tertiary education	24.2	23.5	22.4	22.2	23.8	23.9	24.1	24.7	27.1	27.2	26.0
.. secondary education after secondary education	7.1	6.7	6.7	7.0	7.0	6.6	6.5	6.3	7.2	7.5	7.4
.. higher education, master' and doctoral degree	17.0	16.8	15.7	15.2	16.8	17.3	17.6	18.4	19.8	19.7	18.6
<b>Women</b>											
Primary education or lower	16.6	15.4	14.7	12.9	11.9	11.2	10.2	9.9	9.3	9.3	9.2
Secondary education	48.3	49.4	50.9	52.2	52.4	52.6	53.5	53.0	52.1	52.0	51.2
Tertiary education	35.1	35.3	34.4	34.9	35.7	36.2	36.3	37.2	38.7	38.6	39.6
.. secondary education after secondary education	15.8	15.6	14.5	15.2	15.8	15.6	15.9	15.7	14.0	13.0	13.5
.. higher education, master' and doctoral degree	19.3	19.7	19.9	19.7	19.9	20.6	20.4	21.5	24.6	25.6	26.1
<b>Notice:</b> numbers in percentages; medium of the year											
<i>Source: Statistical Office</i>											

<sup>5</sup> Operational Programme for Human Resource Development, p. 38.

## II Adult Learning and Education

### 1. Policy, Legislation and Financing

#### 1.1 Legislative and policy frameworks of ALE

##### 1.1.1 Legislative and policy environment of ALE

Major shifts have taken place in the education systems of Estonia over the last decade. The content of training and the system of educational institution, as well as the organisation of education as a whole, have changed, having a great impact to ALE.

The educational policy of Estonia has been subject to a continual renewal process. The new concept of education and new legislation worked out on basis of it has been delayed. It is a political agreement in Estonia that education legislation and the legislation supporting participation in ALE should motivate adults to learn, creating opportunities for all target groups to participate in appropriate training. It is crucial for education legislation to be intelligible, providing the learners and those willing to learn with simple and unambiguous information on their opportunities, the ways of making use of them and defending their rights.

In order to promote learning, education legislation must:

- Include regularly the idea of lifelong learning;
- stand on common ground, use common terminology, be intelligible and unbiased towards all individuals willing to study;
- involve as many institutions as possible from all three sectors<sup>6</sup> in the provision of training;
- establish a mechanism for financing and assuring the quality of lifelong learning;
- allow recognition of former learning and working experience in further studies.<sup>7</sup>

The most important and effective basis for achievements in the field of adult education is the fact that the Parliament (*Riigikogu*) passed the Adult Education Act in November 1993 and updated it in the years 1998, 1999 and 2002. The Act confirmed the *principles of legislative framework* for ALE as follows:

- Creating our own model of adult education, which is to be based on the developmental needs of the society and on the actual possibilities for securing adults' access to lifelong learning.
- Guaranteeing a paid educational leave for every adult person in order to participate in education and training.
- Supporting local initiative and bringing learning closer to home.

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<sup>6</sup> Three sectors: public, private and the third sector.

<sup>7</sup> Lifelong Learning Strategy 2005-2008, p. 13



- Advocating co-operation of public, private and non-governmental adult educational institutions.
- Allocating grants for in-service training for teachers and public administrators in the State Budget.

*Adult Education Act* establishes legal guarantees and stipulates the right of every person to lifelong learning throughout his or her life cycle; obligations of central and local governments but also that of the employers in the coordination and implementation of adult education; the financing of adult education from national budget:

- *The Government of the Republic* approves national priorities of adult education; and based on these priorities, allocates the necessary resources for adult training in State Budget.
- *Local governments* guarantee the opportunity to acquire basic and secondary education to permanent residents in their territory and promote work-related education and popular education in co-operation with other local governments if necessary; and support the participation of the unemployed, job seekers, also disabled and other socially disadvantaged persons in courses.
- *Employers* grant study leaves to persons employed under employment contracts for participation in training. A study leave of up to one month per year shall be granted at the request of the employee for study sessions for general education leading to a certificate of achievement, the employer shall also grant an employee a study leave for work-related continuing education with payment of his/her average salary for at least fourteen days per year during time periods agreed on by the employer and the employee. A study leave for popular education shall be granted upon the agreement of the parties for at least seven days per year.

In addition to Adult Education Act the following legislation has been issued (most of them after CONFINTEA V), regulating ALE:

*Basic Schools and Upper Secondary Schools Act* (1993) and the regulation by the Minister of Education and Research “Conditions and procedure of participating in the evening and distance form of study at basic school and upper secondary school and graduating basic and upper secondary school in the form of external study”. Pertinent legislation regulates the study opportunities of adults at basic school and upper secondary school. Based on valid legislation, adults have the opportunity to study in upper secondary school for adults or at pertinent departments of upper secondary schools in daytime form of study in the evening or distance form of study, or graduating school as an external student.

*Vocational Education Institutions Act* (1998) and the regulation by the Minister of Education and Research “Conditions and Policies for the Organisation of Professional

Training of Adults at Vocational Institutions” regulate studying on the level of secondary vocational education in the form of distance learning and work-related training for adults at vocational schools.

*Professional Higher Education Institutions Act* (1998) regulates learning as full and part-time and external student and also the recognition of former learning and working experience. The act entitles boards of educational institutions to stipulate the areas, forms and procedure of providing professional training for adults.

*Universities Act* (1995) regulates learning in full and part-time and external study forms and also the recognition of former learning and working experience. The act entitles boards of universities to approve the areas, forms and procedure of the work-related training provided.

*Private Schools Act* (1998) regulates the establishment and operation of private schools. According to this act, all legal persons in private law providing instruction exceeding 120 hours or six months a year, must establish a private school and apply for a training license.

*Employment Service Act* (2000) regulates the provision of labour market services to persons seeking work and to the unemployed. Pursuant to the act, the unemployed are entitled to apply for employment training with the usual duration of up to six months. The employment office may also order longer training, if the unemployed is guaranteed with a job and the future employer will pay for the training. Employment training is a kind of professional training, which purpose is the improvement of the level of labour market competitiveness. In addition to other services the unemployed are also entitled to receive vocational guidance.

*Income Tax Act* (1999). Pursuant to this act, persons are entitled to exemption from income tax in the amount spent on training. Expenses borne by the employer on formal education of the employee within the adult education system or on popular adult education are interpreted as a special benefit.

*Value Added Tax Act* (2001). Pursuant to this act, VAT is not imposed on giving of private lessons related to general education and other types of training, with the exception of training provided by an incorporated entity or a self-employed person.

### ***Lifelong Learning Strategy 2005 – 2008***

Due to incremental need for considerable improvement of the opportunities of lifelong learning and adult education, a team of experts was called by the Minister of Education and Research in 2001 for the development of a lifelong learning strategy. Representatives of different educational sectors and levels, large and small companies and the public sector, also people representing various areas of activity were appointed members of the team, thus allowing analysis of the opportunities and needs of lifelong learning from different angles. In

2002 a document was sent to over forty organisations in order to obtain their opinion; the text of the strategy was supplemented on the basis of the feedback received.

Working on the basis of the last version of the strategy began at the Estonian Ministry of Education and Research Division of Adult Education in 2004 on the basis of suggestions of the members of the group of experts. The document was prepared in cooperation with the Adult Education Council, consulting the Government of the Republic.

The strategy comprises goals and measures important for Estonia and their implementation plan in order to:

- enhance study motivation in all target groups, in particular of those groups whose access to learning opportunities is hindered either due to economic reasons, lack of time or interest or any other reason;
- improve the competitiveness of Estonia and its population in the world;
- achieve sustainable economic development;
- improve the capacity and coping with life of every person;
- intensify social integrity of the population and the development of citizenship and improve the quality of people's life;
- achieve strategic aims in education and training set by the European Council for the year 2010 i.e. the ensuring of quality, accessibility and openness.

Tasks of the strategy were defined as follows:

- integrate the sectors of adult education (public, private and third sector) and specify their different roles in the meeting of social demand;
- guarantee that the contents and organisation of Estonian adult education were on internationally recognised level in terms of theory, methodology and methods;
- harmonise Estonian adult education with documents worked out by the European Commission and with the EU standards;
- regulate social demand in the field of adult education which has undergone drastic changes as a result of:
  - rapid changes in society and the working environment;
  - development of information and communication technology;
  - people's need for education for coping on the labour market, where the number of the unemployed and the number of job vacancies is rapidly growing and where increasing demands are imposed on both professional and personal level;
  - companies need to become and remain competitive on the domestic and foreign market;

- increased social inequality among people and alienation of citizenship from the state;
- the need of Estonian society to build and secure democracy; also in the context of intensive foreign relations and international integration;
- lay a foundation to the development of legible and transparent adult education financing scheme and to the creation of legal space required for its implementation.<sup>8</sup>

### **Adult Learners' Week**

The Adult Learner's Week (ALW) arranged in Estonia since 1998, after CONFINTEA V, has become an influential outreach event for the implementation process of lifelong learning concept, thus having already continuity and traditions.

The duration of the ALW has extended from 5 days to 7, including events throughout the Week. The number of participating organisations has increased more than tenfold compared to first years. The number of different events has grown and their profile has changed. In 2007 400 different events took place with 14 thousand people participating. In addition to educational events, there are those of cultural and social nature. We consider the development of lifelong learning and motivation of adult learners essential all over the country. So, the opening ceremony of ALW, as well as other national level events during the week, are not carried out only in the national capital or bigger cities, but also in different regional centres and smaller villages.

The aim of ALW is to value learning in adulthood, introduce the diversity of learning possibilities and create opportunities for co-operation between learners, providers and different organisations.

The major subjects discussed during the ALW have been:

- how could education system contribute to making lifelong learning a reality;
- how could educational system subsidise lifelong learning;
- how to motivate adult people to participate in learning;
- how could education system guarantee appropriate training for special target groups helping them staying on or re-entering into the labour market;
- what are the roles of different educational institutions in supporting adult learners and solving their problems in labour market.

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<sup>8</sup> Lifelong Learning Strategy 2005-2008, p. 30.

### **1.1.2 Priority goals for ALE**

Pursuant to Adult Education Act, Government of the Republic approves national priorities of adult education. In 2000 Government of the Republic approved “National priorities of adult education until 2003”. In 2004 Government of the Republic approved national priorities of adult education for 2004–2006 that support the application of the principles of lifelong learning. The Ministry of Education and Research, its cooperation partners and all the parties involved proceed from these priorities during the organisation of pertinent activities. Before endorsement of the priorities by Government of the Republic they were approved by the Council of Adult Education.

The priorities were set on the basis of a survey, compiled by Institute of International and Social Studies, Tallinn Pedagogical University.<sup>9</sup> In this survey the priorities of adult education were defined on the basis of expert opinions and analysis of the different sectors’ development plans adopted in Estonia.

***National priorities of adult education for the years 2004–2006 were defined as follows:***

- create better opportunities for adults to enter into lifelong learning, including also formal education, create opportunities for education system dropouts to return to the system;
- develop adult consultation system, including available career consultation services and develop an information system introducing learning opportunities aimed at adults;
- develop a system of recognition of previous learning and working experience;
- develop adult education financing model, including motivation of companies via the system to invest into the training of employees
- ensure the quality of adult training, including vocational training.

***Priorities for lifelong learning 2008-2013***

Priority goals for the next period are defined in the *Operational Programme for Human Resource Development for the period 2008-2013*.<sup>10</sup> Priority will be given to following activities which help to achieve the set goals:

- Supporting participation in Lifelong Learning.
- Development of information and counselling service that supports Lifelong Learning.
- Increase competitiveness in employment for non-ethnic Estonians.
- Creating flexible study opportunities for preventing drop-out.

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<sup>9</sup> See: *National priorities of adult education. Recommendations for the years 2003–2004*

<sup>10</sup> *Operational Programme for Human Resource Development*, pp. 84-87

There are two main groups of activities to achieve lifelong learning priorities:

*1. Increased participation in lifelong learning according to abilities and need*

- Adults will be ensured the availability of training that targets an increase in labour market competitiveness and the acquisition of key competences for lifelong learning which also proceeds from regional or state needs.
- Activities associated with the development and implementation of a competence-based state qualifications system will be supported.
- Youth services will be developed in order to prevent social exclusion, to create a non-formal learning environment, and a support network to encourage the acquisition of skills necessary for entry into the labour market.
- Publicity and counselling service that supports lifelong learning will be developed.
- Training will be supported that targets increase in the employment of non-ethnic Estonians.
- The development of network-cooperation of environmental education support centres will be supported, as well as environment-related training meant for varied target groups.

*2. Study in general and vocational education is of a high quality, and in accordance with the needs of learners and the society*

- Activities will be supported for improving study quality, in order to increase the adaptation of people with the needs of a knowledge-based society, and to reduce discontinuation of studies.
- Flexible forms of study in general and vocational education will be extended, including for people without basic education, and learners with special needs.
- Conditions will be created for study that is in accordance with the abilities of learners with special needs.

**1.1.3 Sharing responsibilities<sup>11</sup>**

The responsibility of developing ALE in Estonia is divided between several ministries. However the leading ministry in the sphere of adult education is the *Ministry of Education and Research*, no ministry should seize a monopolistic role in the process. Although the area is regulated mostly by regulations belonging to educational legislation, the creation of study opportunities involves different support structures (tax policy, benefits, employment policy etc.) this is why the co-operation of the Ministry of Education and Research with other ministries and sub-units is inevitable.

The following belongs to the sphere of responsibility of the *Ministry of Social Affairs*: labour market services to the unemployed and the job-seekers (information regarding labour

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<sup>11</sup> Responsibilities of Ministries are fixed in *Lifelong Learning Strategy 2005-2008*, p. 16. See in detail in part 2.1.2 of the current report.

market situation and employment training, employment mediation, employment training, vocational guidance, employment subsidy for starting business activities). The services are provided by employment offices in the composition of Estonian Labour Market Board, belonging to the administrative area of the Ministry. In co-operation with the Ministry of Social Affairs resolutions are adopted, concerning the ensuring of social guarantees to the learners. The order of state-financed training vacancies to vocational education institutions is put together in co-operation between the *Ministry of Economic Affairs and Communications*, the *Ministry of Social Affairs*, *Estonian Labour Market Board*, *Minister of Regional Affairs*, the unions of employers and employees and professional associations.

The *Ministry of Economic Affairs and Communications* has demonstrated a spirit of cooperation in pinpointing economic sectors with declining relative importance. Accessibility of training opportunities and availability of consultation service is particularly important for employees working in economic sectors with declining relative importance to improve their labour market competitiveness. State-commissioned vacancies in higher education (incl. part-time studies) are put together by the Ministry of Education and Research in co-operation with several partners: other ministries, Estonian Employers' Confederation, Statistical Office, Qualification Authority, Rectors' Council, Council of Rectors of Professional Higher Education Institutions, Council of Rectors of Private Universities, and Federation of Estonian Student Unions. Professional associations also submit suggestions related to state-commissioned adult training.

In co-operation with the *Ministry of Finance*, decisions regarding the financing of adult education on a broader level are made, incl. valid tax system and incentives applicable to learners.

#### **1.1.4 Alignment of strategies**

Lifelong learning as a key phenomenon for improving state economy was recognised after the adoption of the Lisbon strategy in the year of 2000. Several strategic documents have stated the importance of economical development in relation to lifelong learning and education. For example: *Estonian Lifelong Learning Strategy 2005-2008* (2005) includes descriptions of lifelong learning goals, measures, and activities for Estonia. Strategy also states that one of the goals of Estonia is to achieve sustainable economical growth. Development plan *Estonian Success 2014 (Eesti edu 2014, 2004)* aims to achieve better life quality through competitive economy and knowledge based society in Estonia by ensuring sustainable and human-centred social and economical development.<sup>12</sup>

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<sup>12</sup> Lifelong Learning Policies in Estonia. LLL 2010 SP1 Country Report, p.13.

The latest significant documents affecting the area of lifelong learning in Estonia are the National Development Plan for 2003–2006,<sup>13</sup> and Estonian National Strategic Reference Framework 2007-2013.<sup>14</sup>

### ***National Development Plan 2003–2006***

The National Development Plan (NDP) 2003-2006 was aimed at the preparation of Estonia for the implementation of the means of the European Social Fund. As a part of the NDP lifelong learning system and development of adult education are presented. The document states that the main factor assuring the development of Estonian society and economy is well-educated labour force adapting quickly to any changes. The labour market needs people who are able to study independently, make decisions in new situations, handle contemporary technologies and have teamwork and communication skills.

In creating learning possibilities for adults, their previous study and work experience should be considered as well as conditions for consolidating their studies, working and family life. Similarly, the present work experience and training in formal education should be taken into account. The retraining of those people who have left the education system more than 10 years ago is of utmost importance.

NDP marks that the relatively high level of education could be regarded as one of the strengths of Estonia. Education has always been highly valued in Estonia and its prestige has grown even higher during the past year. The high level of general education is a precondition for the re-training ability and flexibility of the labour force. Unemployment in Estonia is structural since there are no workplaces for workers with low qualification. At the same time, lack of qualified workforce is one of the main obstacles for establishing modern enterprises. The educational system does not ensure people with sufficient resources for working life, flexibility, possibilities and readiness for lifelong learning.

### ***NDP priorities***

The five priorities in the National Development Plan are:

1. Human resources development
2. Competitiveness of enterprises
3. Rural development and agriculture
4. Infrastructure and local development
5. Technical assistance

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<sup>13</sup> See: Estonian National Development Plan for the implementation of the EU Structural Funds, pp. 106 – 107.

<sup>14</sup> Estonian National Strategic Reference Framework (ENSRF) 2007-2013



General goals of the first priority (human resources development) are the increase and better use of labour force potential of Estonia. Measures of that priority are:

- To develop a flexible system of lifelong learning providing access to everyone and guaranteeing employability of the labour force.
- To increase competitiveness of economy in small and medium enterprises and Research and Development sectors.
- To implement active labour market measures.
- To enhance administrative capacity.
- To increase social inclusion.

Adult education is included in the first three measures. Specific objectives of the first measure are:

- ensuring the quality of education and training;
- equal opportunities regarding access to the educational system;
- creating opportunities and conditions for lifelong learning.

For developing adult education, the following activities are supported:

- elaborating the principles and mechanism for adult education and work-related training;
- training of trainers;
- supplying educational institutions with modern teaching materials;
- developing further vocational qualification system;
- developing and implementing a functioning system of vocational and career counselling and information.

### ***National Strategic Reference Framework 2007-2013***

To ensure the subsistence and development opportunities for people and thereby the preservation of national competitiveness in the fast-changing economic environment, the existence of a flexible educational system and, in particular, opportunities for life-long learning are important. Quality of the acquired education is also essential. The labour market readiness of people depends on those factors, as does the availability of work force required for economic development. The readiness can additionally be increased by the labour market services that enable to direct people who have lost their jobs or are looking for jobs to the fields of activity with demand for labour force. Another essential prerequisite for labour market readiness is also the health status of people, which determines the activeness people's participation in the social and economic life. Analysis of the current situation reveals that there are big deficiencies in those areas that could be overcome by integral approaching

of these aspects of human development. In particular, the shortage of labour force has become the most pertinent problem in the field of human resources that needs to be thoroughly addressed given the long-term demographic perspectives in Estonia that contribute to further aggravating labour shortages in the future. More specifically, it is necessary to focus the efforts on the following activities, for the purpose of addressing both the issues of long-term labour supply (shortage) as well as people's subsistence and development opportunities:

- increasing the quality and flexibility of education in Estonian, creating equal opportunities for skill- and interest-based life-long learning and improving the quality and availability of youth work – by developing both the relevant underlying infrastructure as well as the studies and training itself;
- preventing illness, favouring healthy choices and life styles; hindering the spread of infectious diseases; reducing environment-related health risks; and ensuring the availability of health care services;
- increasing the supply of qualified labour force and improving the quality of work life;
- developing welfare services, increasing social inclusion and promoting gender equality;
- improving the efficiency of integration of non-Estonians.<sup>15</sup>

In 2006 the preparatory work for implementing European Social Funds during the years 2007–2013 was started. Three operational programmes were prepared, one of them being - *Operational Programme for Human Resource Development*<sup>16</sup> (contains all activities funded from European Social Fund), mainly for funding educational activities.

### **Strategies**

Development plans and/or strategies are elaborated in all sectors in Estonia, incl. economy, rural life, social inclusion, culture etc. ALE is engaged as an important part of these policies. For example, in the Rural Development Plan 2007–2013 the following means have been foreseen as a possibility to improve the life and economy in rural areas: *increase in knowledge-based activities in agricultural production and processing; improvement of the quality of labour force, training, retraining and advisory service.*<sup>17</sup>

Policies in Estonia regarding enterprises also give a crucial role to *lifelong learning* – “Life-long learning of an undertaking is as crucial as the life-long process of acquisition and

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<sup>15</sup> ENSRF 2007-2013, pp. 58-59.

<sup>16</sup> See: Operational Programme for Human Resource Development (CCI2007EE051PO001)

<sup>17</sup> Estonian Rural Development Plan 2007–2013, p. 65.

modernization of knowledge and skills of any other specialist. *Inter alia*, it is important to improve the knowledge of the undertakings in regard of challenges that undertakings face related to the aging society and decreasing human resources of working age. The undertakings must also be aware of the opportunities included in the application of flexible working methods and occupational safety. It is necessary to help the undertakings to recognise what they do not know in order to direct the undertakings to study, they should be also allowed to find suitable areas of training as well as educators. In addition to the traditional forms of training role models and examples are needed – for this purpose instructive business experience - success stories and best practices - will be made available to the interested parties”.<sup>18</sup> Such examples can be found in the majority of the development plans covering various areas.

The importance of lifelong learning is also mentioned in the strategy of *Estonian Success 2014, 2004* and in the other document that identifies the future objectives of Estonia - *Strategy of Sustainable Estonia 21, 2003* (Strateegia Säästev Eesti 21, 2003). In the both documents, lifelong learning is seen as a tool to strengthen economy.<sup>19</sup>

### ***Building the knowledge-based society***

The measure of a knowledge-based society is highly qualified workers, whose knowledge, skills and experiences are the guarantee for the development of the society and competitiveness. According to the Centre of European Policy Studies, the key problem for Europe in achieving a high employment level and a growth in productivity is not so much the structure of the employment market as the insufficient level of skills in the population. Thus the recommendation that, in order to manage employment problems, countries should raise the level of education of their labour force since those European Union countries characterised by the rapid increase of people with higher education entering the labour market over the last ten years, have also experienced the greatest increase in employment.<sup>20</sup>

The development of a knowledge-based society presumes relatively greater attention being paid in Estonia to the fields of science and technology (ST)<sup>21</sup>. Whereas, in the number of researchers and engineers, the level in natural sciences has been almost restored to the 1996 level, the respective figures in engineering were almost 30% less in 2004 than in 1996. The nominal increase in the funding of natural and engineering sciences during the same period has been almost 1.5 times slower than in the social sciences and humanities. The

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<sup>18</sup> Eesti ettevõtluspoliitika 2007 – 2013, p. 21.

<sup>19</sup> Lifelong Learning Policies in Estonia. LLL2010 SP1 Country Report, p. 28.

<sup>20</sup> Gros, D. *Employment and Competitiveness. The Key Role of Education. Centre of European Policy Studies*. Policy Brief. No 93/February 2006

<sup>21</sup> Study fields of engineering, production and construction, and science (ISCED 97; *The International Standard Classification of Education*)

funding of one full-time researcher in natural sciences in 2004 was practically the same as the funding for a researcher in humanities, and in engineering it was 30% higher.<sup>22</sup>

The economic competitiveness of Estonia has a major role in improving the living standard of our people as well as helping Estonia to take a position among the most prosperous countries in Europe.<sup>23</sup>

In order to keep and improve national competitiveness, a proactive, well-targeted and versatile support to its enterprises is needed in Estonia, including support for development of relevant skills and knowledge for the utilisation of new management principles and strategies. Those changes presume that companies develop and improve skills and capacities for a more meaningful and long term collaboration, among others, with R&D and higher education institutions to improve also the links of the latter with the business sector. In the conditions of the ageing population and labour force shortages, growing international competition and expanding export opportunities, productivity growth and value-added are a key factor for the development of enterprises and the economy as a whole. Therefore, it is necessary for Estonia to take the course towards developing the knowledge-based economy. Active implementation of training schemes in the enterprise sector would allow the country to better utilize the potential of the existing human resource and get good new workers by offering people relevant knowledge, skills and experience.<sup>24</sup>

For better planning of the research and development activities, the Government adopted in 2001 the Strategy "*Knowledge-based Estonia 2002-2006*", setting two main priorities - to update the knowledge pool and to improve the competitiveness of enterprises. Regarding these as the key areas for gaining competitive advantages, the new R&D Strategy for the years 2007-2013, elaborating the measures and activities envisaged by both the strategy of the previous period and the Estonian Action Plan for Growth and Jobs and setting new objectives for the next programming period of the EU social funds.

Research and development, and innovation (RD&I) are at the core of the knowledge-based society model in developed countries. Knowledge-based society is constantly developing, sustainability of the society is based on creating and using knowledge aimed at efficient operation of the society and innovative economy, to increase welfare of the people.

Estonian RD&I Strategy 2007–2013 "Knowledge-based Estonia" focuses on sustainable development of the society by means of research and development, and innovation. It contributes to achievement of the goals of Estonia's long-term development strategy "Sustainable Estonia 21" as well as the Lisbon Strategy (the strategy for growth and jobs).

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<sup>22</sup> Operational Programme for Human Resource Development, p. 34.

<sup>23</sup> Andrus Ansip, Prime Minister. In: *Knowledge-Based Estonia. Estonian Research and Development and Innovation Strategy 2007-2013*, p. 4.

<sup>24</sup> Estonian National Strategic Reference Framework 2007-2013, p. 59.

The current strategy is the follow-up of Estonian Research and Development Strategy 2002–2006 “Knowledge-based Estonia”.

*National research and development programmes will be launched on the basis of the strategy:*

- 1) for developing key technologies;
- 2) for solving socio-economic problems and achieving the objectives in socio-economic sectors that are important for every resident of Estonia, as for instance energy, national defence and security, health care and welfare services, environmental protection and information society;
- 3) for ensuring and promoting the sustainability of research related to Estonian national culture, language, history, nature and the Estonian state.

*The objectives set in the strategy will be achieved through four measures:*

- development of human capital;
- organising the public sector RD&I more efficiently;
- increasing enterprises’ innovation capacity;
- policy-making aimed at long-term development of Estonia.<sup>25</sup>

### **1.1.5 The main development challenges**

On 14 September 2003, the Estonian citizens gave their firm approval to Estonia’s accession to the European Union. With this historic decision, the Government also undertook the obligation to protect and promote the interests of its citizens in the unified Europe, the member of what Estonia is from the first of May 2004.

For now Estonia has been a member of the European Union for four years. During that time we have experienced rapid economic growth and felt the solidarity of other Member States of the European Union. We have seen that an internally and externally strong European Union is in the best interests of Estonia. The correctness of the chosen path has also been confirmed by the continuously high rate of public support for Estonia’s membership in the European Union.<sup>26</sup>

The Government’s European Union Policy for 2004-2006 was based on the following values:

*Equal opportunities*

*A simple and citizen-friendly Europe*

*Well-being and entrepreneurship*

*The need to be demanding and constructive*

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<sup>25</sup> Knowledge-Based Estonia. Estonian Research and Development and Innovation Strategy 2007-2013, pp. 5-6.

<sup>26</sup> Estonia’s European Union Policy 2007-2011, p. 4.

It was stated in the development plan that a common educational space will be created together with the other members of the European Union, which will help to enhance the competitive ability and flexibility of the labour force. In Estonia's opinion, particular attention should be paid to the following areas in education:

- lifelong learning (in particular, advanced learning) and the development and modernisation of informal education, including increasing accessibility to education for less-favoured target groups;
- development of mobility programmes for education and science;
- improvement of the quality of education in the EU, including the development of quality assurance systems at both national and trans-European level, and the purposeful development of a single quality assurance system for vocational education;
- determination of the role and authority of teachers, and updating and purposeful development of teacher training (especially in vocational training).<sup>27</sup>

In April 2007, a new government assumed office, and the Coalition Programme for 2007–2011 was approved by the coalition partners as the basis for its activities. In order to implement the Coalition Programme, the government approved the Action Programme of the Government of the Republic for 2007–2011, which provides for specific activities and terms for the implementation of objectives set forth in the coalition's programme.<sup>28</sup>

Together with other aims it is said in the Coalition Programme that the goal of the Governing Coalition is to introduce a policy which would ensure the availability of competitive education for the people of Estonia, providing them with equal opportunities and also ensure the development of research in Estonia and, through this, the skills and knowledge for successful management in the environment of globalisation. To that end the Governing Coalition shall realise the following budgetary, economic and legal policy steps through 2007–2011<sup>29</sup>:

- increase the annual expenditure on education at least at the same pace as the average growth of budgetary expenditure;
- increase the number of participants in adult education from 6% to 12.5% by 2010;
- considerably increase the portion of the GNI spent on education and research. Establish the goal of spending 2% of the GDP on research and development by 2011, whereas the state will ensure at least half of it through budgetary allocations. The

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<sup>27</sup> The government's European Union Policy 2004 – 2006. Adopted by the government on 22nd March, 2004. See also [www.riigikantselei.ee](http://www.riigikantselei.ee)

<sup>28</sup> Action Plan for Growth and Jobs 2005 – 2007 for the implementation of the Lisbon Strategy. Progress report 2007.

<sup>29</sup> Here only some more important steps are presented.

Governing Coalition establishes a long-term goal of spending 3% of the GDP on research and innovation by 2015.<sup>30</sup>

Keeping in mind the objective of increasing the competitiveness of the economy, Estonia supports the focus of the EU-level cooperation in the field of educational policy on creating conditions for a transition to a knowledge-based economy, and developing human capital for supporting the competitiveness of labour market. It is our common challenge to ensure that educational research and assessment would contribute more evidence to the knowledge base regarding educational policy and the practices that would enable to improve education systems more efficiently. Therefore it is important, in order to follow the Lisbon objectives in the field of education and training, to invest in the creation of a single framework of indicators and reference levels, and to make the most of international reference studies.<sup>31</sup> The common educational goals and reference levels<sup>30</sup> of the European Union must also be taken into consideration in national policies.

Estonia attaches importance to the development of the European qualification framework, supporting the principles of lifelong learning and promoting the educational and professional mobility of residents. We also find it important to increase the quality and attractiveness of vocational training, the development of ECVET as a means of ensuring the comprehensive recognition and transfer of vocational studies, and increasing the share of adults participating in learning. We find it important to develop and implement common principles in the European Union regarding career services. The aim is to encourage people to obtain new skills and knowledge throughout their entire life. Estonia supports the common steps of the Member States towards the recognition of non-formal learning.<sup>32</sup>

#### **1.1.6 Other policies having impact on ALE**

Estonia has agreed to international framework agreements that provide its citizens with an opportunity to participate in the educational sector and on the European labour market. Agreements such as the Bologna and Sorbonne Declarations, which establish a common European educational space and the Lisbon Convention, which acknowledges academic certificates and provides access to academic education, will boost this kind of participation.

Development plan for the Estonian vocational education strategy 2005–2008 includes lifelong learning as an important part of the policy. The ratio of fields of training has been modified in both vocational and higher education. A network of schools that matches the changes taking place in number of students is being established. The share of the private sector has increased in education, as has the relative share of paid studies in public

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<sup>30</sup> Programme of the Coalition for 2007-2011

<sup>31</sup> E.g. PISA; OECD teacher study, language skill study, etc.

<sup>32</sup> Estonia's European Union Policy 2007-2011, p. 13–14.

universities. A reform of vocational education, aimed at securing the Estonian society with highly qualified labour, has begun. Estonia has signed international framework agreements that provide its citizens with an opportunity to participate in the educational sector and on the European labour market. The following improvements should be noted among the changes that have taken place at different levels of education and having an impact on ALE:

- National frame curricula have empowered schools to develop school curricula that take into account the specific features and regional character of a school as well as the wishes of the students. Conditions have also been provided for students with special requirements who attend regular schools. Estonian-language training, provided for non-Estonian students from different age groups, has become more efficient.
- The application of a national model curriculum, based on professional standards, has been initiated in vocational education. The different social partners involved — employers, employees and educational representatives — participate in professional boards responsible for the development of a professional qualification system. Qualification standards for professional instructors have been passed.<sup>33</sup>
- A national accreditation system, employing foreign experts for more objective assessment, has been established to assure the quality of academic higher education. Opportunities for obtaining higher education have increased, thanks to the growth in number of private institutes of higher education and the establishment of open universities.
- Applied higher education and vocational higher education curricula have been created to meet the labour market requirements and applied institutes of higher education have been established. A general state-secured student loan system has been established to provide all capable students with access to higher education.<sup>34</sup>

## 1.2 Financing of ALE

### 1.2.1 Public investment in ALE

The most important rules and models for financing ALE in Estonia are fixed in the Coalition Programme, State Budget, Estonian National Development Plan for the

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<sup>33</sup> The professional standard for adult educators was passed in 2003 and since then 101 qualification certificates have been issued (omistatud = assigned to applicants?)

<sup>34</sup> See more [www.hm.ee](http://www.hm.ee)



Implementation of the EU Social Funds 2004-2006, Estonian National Strategic Reference Framework 2007 – 2013 and Lifelong Learning Strategy 2005-2008.

In the Estonian National Development Plan for the Implementation of the European Social Fund 2004-2006 human resource development was seen as the most crucial means for ensuring sustainable development of economy and the whole society. The availability of well-educated and flexible labour force capable of adapting to the rapid changes in information society is a strong prerequisite for enhancing the competitiveness of the economy. More skilled labour force enables the use of new and more advanced technologies, development of the potential of business and creation of new jobs. Also, qualified labour force would serve as one of the main prerequisites for effective implementation of development planes of structural nature.<sup>35</sup> This is the reason why human resource development was included as number one on the priority list of goals.

It is said in the Lifelong Learning Strategy<sup>36</sup> that in order to improve the opportunities and conditions of adult education and increase the number of participants involved in adult education, a change in the financing system is required. The basis and underlying legislation of financing require amendment and supplementation. This will primarily bring about the allocation of considerably larger financial support to adult education. Valid legislation allows financing of adult education from state budget as follows:

*General/formal education acquired within adult education system*

- Provision of basic and upper secondary education via evening and distance learning at adult upper secondary schools to everyone interested.
- Acquisition of secondary vocational education on the basis of secondary education in form of part-time studies in the extent of app. 700 – 800 training vacancies.
- Part-time studies in certain areas of higher education (i.e. teachers without higher education, Master's studies of school principals).

*Work-related training*

According to law, the state budget includes funds for in-service training of educators (3% from salary fund), officials (2-4% from salary fund) and the unemployed and job-seekers (areas of responsibility of the Ministry of Social Affairs). The Ministry of Agriculture has also

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<sup>35</sup> Estonian National Development Plan (ENDP) for the Implementation of the EU Structural Funds – SPD 2004-2006, p. 202

<sup>36</sup> Estonian Lifelong Learning Strategy. 2005. Pp.17-18. See also investments from other Ministries part 2.1.2 in current report.

applied for the payment of in-service training allowance for the training of people working in the agricultural sector.

### *Popular adult education*

Funds from the budget of the Ministry of Education and Research to support the payment of salaries to principals and trainers of approximately 45 non-formal educational centres are allocated by way of competition. For the organisation of competition, payment of support and methodological supervision of the centres receiving such support, a contract has been concluded with the umbrella organisation of non-formal training centres – Estonian Non-Formal Adult Education Association.

Hence either people themselves or their employers pay for the training. Other interested parties, for instance local governments, support training in the area of general and popular adult education at their own discretion. The government supports participation in training via valid tax system. Pursuant to Income Tax Act a person is entitled to exemption from income tax in the extent of the amount spent on training and employer-financed work-related training is not regarded as special benefit; however, the financing of employee's formal and popular adult education by employer is regarded as a special benefit. Pursuant to Value Added Tax Act tax benefit is not imposed on pre-school, basic, secondary or higher educational training, giving of individual lessons related to general education and other training, except the training provided by an incorporated entity or self-employed person.

In State Budget, funds are allocated via the Ministry of Education and Research for the implementation of national priorities regarding adult education, ratified by the Government of the Republic, to finance adult education projects and support popular adult education centres and Estonian Non-formal Adult Education Association. The funds allocated from State Budget for supporting adult education have remained unchanged since mid-1990's with a decline in 2004, when the amount allocated to non-formal education centres and Estonian Non-formal Adult Education Association was reduced by 50% - from four million Estonian kroons (254 777 Euros) to two million Estonian kroons (127 388 Euros).

Adult Education Act (AEA) allows the declaration of training and research priorities, obliging the Ministry of Education and Research (hereinafter as MER) to allocate funds in its budget for the implementation of the priorities. In its current version the regulation restricts MER's opportunities to develop the system and does not guarantee opportunities for the improvement of the availability of training. Hence MER has prepared AEA draft amendments, supposed to substitute the funding of training with the funding of development, thereby creating better opportunities to MER as the organisation responsible for the coordination of activities in the area, to ensure opportunities and conditions for the development of the entire system. The goal is to stop, on the basis of pertinent article, the funding of training projects

and start funding the activities necessary for the development of adult education system. Thus the Government of the Republic will no longer declare training topics as priorities, but the activities supporting the development of the system of adult education and lifelong learning instead.

The total sum for ALE in the State Budget 2008 is divided between Ministries - the biggest part - more than 50 million Euros, is going to Ministry of Education and Research, Ministry of Social Affairs has resources for unemployed training and Ministry of Economic Affairs and Communication covers different programmes for working adults.<sup>37</sup>

The State Budget allocates funds for ALE to local municipalities for covering the work-related professional training of pedagogues (3% from the teachers' yearly salary fund). For 2008 the total sum was around 5.5 million Euros.

### **1.2.2 Foreign donor investments in ALE**

Support received from the **European Structural Fund** has been of substantial assistance in the development of vocational education. Within the framework of Measure 1.1 of the National Development Plan 2004–2006, support was provided to the development of professional development training for teachers in vocational education institutions and for tutors of practical work experience in enterprises. Projects were also supported that helped to raise the quality of vocational education, to develop study programmes and to create flexible learning opportunities in vocational education. Projects that were directed to the development of professional qualifications also received support. One-third of the projects that received support within the framework of the measure were dedicated to the promotion of vocational education or the professional qualifications system. Major sectoral projects were initiated in vital key areas (development of study programmes for vocational education institutions, development of a system for the formal and further training of vocational education teachers, development of a system for the internal evaluation of vocational education institutions, business studies, development of a career service system, implementing a workplace-based form of study). Support was received through the projects by institutions of various type and size, and regions from throughout the whole country were involved. The direct applicants were vocational education institutions, state institutions, local governments, non-profit associations, as well as companies. Through partner relationship, support has reached almost all of the state vocational education institutions, as well as a substantial part of institutions associated with vocational education.<sup>38</sup>

With the help of the European Structural Fund that opened up for Estonia in 2004, the Ministry of Education and Research has planned activities for the development of lifelong

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<sup>37</sup> State Budget 2008 explanatory letter. See [www.fin.ee](http://www.fin.ee)

<sup>38</sup> Operational Programme for Human Resource Development, p. 30.

learning. The need for the development of opportunities and conditions of lifelong learning is described in the national development plan “Estonian National Development Plan for the Implementation of the European Structural Fund – Single Programming Document 2003-2006” (NDP) and the NDP supplementation. The main priority of NDP is the development of human resources. The first priority consists of four measures.

Measure 1.1 Educational system, supporting the flexibility and employability of labour force and providing opportunities of lifelong learning for all. Specific targets of the measure:

- guarantee the quality of education and training;
- create equal opportunities for the acquisition of education;
- create conditions and provide opportunities for lifelong learning.

The total volume of the first priority measure 1.1 for the first programming period (2004–2006) of the national development plan was EEK 838,479,613.00 (approximately 54 million Euros)<sup>39</sup>, of what 25% was support from Estonian public sector and 75% comes from ESF. Within this measure, the following was envisaged for the development of lifelong learning:

- provision of work-related training to working adults and those with lower competitiveness level the training of trainers;
- creation of information database of learning opportunities for adults;
- development and introduction of the system of taking into account the previous learning and working experience;
- provision of counselling to adults;
- further development and application of professional qualification system.

The support for ALE game also for other measures:

Measure 1.2 Human resource development increasing the competitiveness of enterprises. The general purpose of the measure was to prevent unemployment by way of improving the knowledge, skills and adaptability of employees. Through this measure, the in-service and retraining of employees working at companies takes place. Specific targets of the measure:

- to achieve growth of investments into in-service and retraining of labour;
- to encourage potential entrepreneurs to start their own business by way of giving them necessary business management skills;
- to improve managers’ knowledge of new management methods, marketing and export;
- to enable the commissioning of new technologies and quality management systems at companies by way of supporting corresponding staff training required for their implementation.

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<sup>39</sup> By information got from AS Innove (the institution responsible for allocating resources for Measure 1.1), the total sum for supporting ALE in this period was 555 million Estonian kroons (approximately 35 million Euros).

Measure 1.3 Inclusive labour market. The general purpose of the measure was wider and more effective prevention and mitigation of unemployment and thereby, also poverty and social exclusion and the improvement of social involvement. Specific targets of the measure:

- to integrate the unemployed and the employees having received a notice of dismissal into the labour market;
- to provide risk groups with better access to labour market;
- to improve the efficiency and quality of labour market services.

The following activities were supported:

- continuing training and retraining of the unemployed and the people who have received a notice of dismissal;
- increasing of the capacity and readiness for work of the risky groups via rehabilitation and re-socialization;
- teaching Estonian to people with poor language skills;
- provision of employment-related help and creation of protected or support person backed jobs;
- beginning of business activities;
- entrance of women to labour market;
- further development of existing labour market services;
- active labour market measures and modernisation of employment offices.

Measure 1.4 Enhancing administrative capacity. The general purpose of the measure was to improve the administrative capacity of state authorities and local government units and their associations. Specific targets of the measure:

- improvement of professional skills in the field of public administration;
- development and ensuring of the operation of the public service training system;
- improvement of management quality by way of supporting management training of government authorities.<sup>40</sup>

In the adult education sector, support was provided during the 2004-2006 period for training working but uncompetitive adults, training adult education trainers, developing and initiating a system for recognizing prior learning and work experience (VÕTA), as well as developing counselling and information systems for adults in non-formal education, and in the machinery, metalworking and instrument sectors.

For training working adults, numerous training projects are being carried out by vocational education institutions, higher education institutions, as well as non-profit associations involved in education. The training of adult trainers has been planned as one of the activities in a number of training and development projects. Developing the VÕTA system will take

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<sup>40</sup> Lifelong Learning Strategy 2005 – 2008, pp. 23 – 24.

place through a combined project led by the University of Tartu, which should culminate in 2008 with a vision of the Estonian VÕTA system. The developed system will need to be tested and implemented during the new programming period in all teaching institutions offering education and training, and in the professional qualifications system. A central database was not created during this period since it was associated with numerous other developmental activities being carried out on the state level (e.g. extending the system issuing education permits, developing EEIS, etc), but which are currently ongoing or in their initial stages. The lack of availability of training information has been partially compensated for by career services that have been offered to adults within the framework of a number of projects, and also by information on study opportunities that has been collected and made public through various sectoral projects. During the new programming period a central database will be created in parallel with other developmental activities, and career services will continue to be offered to adults.<sup>41</sup>

### **Application of the means of the European Social Fund in the area of adult education within the period 2007-2013.**

For development of the area of adult education and creation of learning opportunities, funds are allocated on the basis of the human resource development operational programme and support is received from the European Social Fund.

There are seven priority directions in the Human Resource Development Programme:

- 1) Lifelong learning (responsible Ministry of Education and Research)
- 2) Good-quality and long working life (responsible Ministry of Social Affairs)
- 3) Knowledge and skills for innovative entrepreneurship (responsible Ministry of Economy and Communications)
- 4) Enhancing administrative capacity (responsible State Chancellery)
- 5) Developing the human resource for R&D (responsible Ministry of Education and Research)
- 6) Horizontal technical assistance
- 7) Technical assistance

Funds for ALE are allocated under the four first listed prioritised paths. The Ministry of Education and Research contributes to the general development of the adult education system and supports training in various educational institutions (mainly in vocational

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<sup>41</sup> Operational Programme for Human Resource Development, pp. 30-31.

education institutions and popular adult education training centres), which is targeted at raising the professional competitiveness of adults.

In 2007 three programmes were prepared under the guidance of the Ministry of Education and Research for the development of the area of adult education and training of adults to be funded from the means of the European Social Fund.

The programmes are the following:

- Professional training of adults in vocational schools and development activities;
- Training of adults in the centres of popular adult education;
- Popularisation of adult education.

The programmes will cover the training of at least 73,000 individuals; the training will be free of charge for the individuals and available in all counties.

The economic development of the state, as well as the coping ability and satisfaction of the members of society, depend on how educated the population is. Building a knowledge-based economy and society that is the foundation for long-term sustainable development presumes the acquisition by people of an increasingly competitive education, and a readiness for lifelong learning. This is why Estonia must be capable of adapting the educational system to a rapidly changing society, economy and labour market. In order to ensure the educational path for all people, and through this to raise their competitiveness, opportunities that match their capabilities must be created for everyone to access education and learning, regardless of age, ethnic background, place of residence, socio-economic situation or special educational needs (incl. disabilities).

The need to contribute to adult education is confirmed by the Estonian demographic forecast that indicates the ageing of the population. In addition, Estonia is characterised by the low participation rate of people involved in adult education. According to surveys, the main reasons for not participating in further training or retraining are a low level of motivation, shortage of money, and the understanding that learning is the privilege of the young. As a result, in addition to the creation of flexible learning opportunities, it is necessary to bring extra financial resources into adult education, and also activities that change the learning attitudes of people. It is also necessary to strengthen the support structures that help to ensure the utilisation of all age groups on the labour market.<sup>42</sup>

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<sup>42</sup> Operational Programme for Human Resource Development, p. 77

The ESF will support ALE in Estonia during the second programming period (2007-2013) altogether with 927 178 million Estonian kroons (approximately 60 million Euro<sup>43</sup>).<sup>44</sup>

Considerable support for ALE came from the European Union through **Grundtvig programme**. From 2001 to 2007 altogether for 139 decentralised projects 750 411 Euros were allocated – 647 562 Euros for study co-operation projects and 102 849 Euros for in-service training for adult education staff. Additional for that 58 026 Euros were allocated in preparation stadium for 58 projects. Support for ALE in Estonia via centralised Grundtvig projects was also remarkable, being around 300 hundred thousand Euros during last eight years.<sup>45</sup>

Development of human resources, *inter alia* by facilitating education and training, strengthening administrative capacity of the local governments and their agencies and the capacity of the public service and the democratic processes had support from the **Norwegian financial mechanisms** during last years.<sup>46</sup> A new **Nordplus** projects started from this year.

### 1.2.3 Support to ALE from private/corporate sector

Since the period of restoration of independence in 1991, the role of private resources in education in Estonia has constantly grown. The most important changes in education system started with establishing private schools and higher education institutions. Step by step, public universities have enlarged the learning opportunities for a fee for students not succeeding in competition for state-paid places. The share of payments by natural and legal persons in education in 2005 and 2006 are provided in table 1.1.

Private investments into adult education are mostly coming from employers/owners of companies. A research conducted in 2000 shows that the bigger a company the more investments are made into personnel training. According to the words of experts, the most successful companies in Estoniapay around 10% out of the yearly salary fund for the training and re-training of employees. It was also indicated in the research conducted in 2001 that employers were ready to pay for the learning of their personnel in 52% of cases - in full amount (45%) and partly (7%).<sup>47</sup>

Inquiry showed that half of the study courses included additional expenses – e.g. transport and lodging in addition to the tuition fee. When we include extra expenses, it leaves

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<sup>43</sup> The number is indicative and could change during the coming years.

<sup>44</sup> See concrete numbers in chapter 2.1.2

<sup>45</sup> Data received from Adult Education Bureau, SA Archimedes,

<sup>46</sup> <http://www.fin.ee>

<sup>47</sup> Elukestva õppe vajaduste analüüs. (Analyse of Lifelong Learning Needs) Saar-Poll Sotsiaal- ja Turu-uuringute AS. Tallinn 2001.



even more for the learners to pay by themselves. The extra expense was covered by the learner in 60% of cases, by employer 22%, and in 15% of the cases the costs were split.

Table 1.1 Expenditures of private educational institutions in 2005 and 2006

Type of education	Higher education	Vocational education	General education	Pre-primary education
Source of financing				
<b>2005</b>				
Total	259 302*	19 033	161 817	10 850
State	11 579	925	29 894	1 888
Local government	0	163	19 517	4 276
Natural person	216 305	9 858	51 454	3 704
Legal person	17 989	458	5 418	105
Equity	5 277	7 480	47 796	804
Foreign sources	8 152	150	7 738	74
<b>2006</b>				
Total	249 198	27 698	176 112	15 795
State	20 032	3 754	44 018	457
Local government	0	439	13 235	7 938
Natural person	204 729	19 551	74 679	7 017
Legal person	8 455	269	8 887	115
Equity	9 901	3 311	28 635	166
Foreign sources	6 081	374	6 658	102

\* Unit: All numbers in thousand Estonian kroons  
Source: Statistical Office

In 2002, ten big companies launched a project “*Look@World*”, investing more than 40 (2.6 million Euros) million Estonian kroons. The aim of the project was to enlarge the Internet connections to all parts of the country and to provide free basic computer skills and Internet training courses for 100 000 elderly persons. The overall objective of the project was to increase the number of Internet users, make it more user- friendly, provide increased public sector service online and help private sector promote Internet use for obtaining information and service.

In 2003 the situation in the corporate sector was different of the present situation. Although private investments into the development of human resources were mostly coming either from employers or employees, employers were very picking in countries with liberal economy like Estonia and chose carefully into which human capital to invest. International practice has shown that the following choices accompany liberal economy:

1. if the role assumed by an employer is that of a “consumer” and not of an investor, there is no other way than to give production or render services requiring only low qualification,
2. if the ambition of an entrepreneur is high-class production or services, one has to invest in employees.

Due to this duality, Estonian employers faced difficulties while forecasting the period of older employees remaining in labour market – whether their investment would pay off or not.

Therefore, it was much more rational to avoid the risk of uncertainty and to invest into younger employees. No surprise, that Estonian employers were not ready to invest into their staff. They still expected considerable input from the government (educational system) or the individual, without being ready for own investments. By investment, we do not mean only financial input but the overall attitude. Entrepreneurs positioned themselves as “consumers of the training service”. The inquiries confirmed the employers’ attitude towards current labour market problems: that somebody should come and do something about it, that the problems should be solved by someone else. The attitude was characterized by the statement of one employer: “Employers are forced to train employees at their own expense, which is both expensive and time-consuming”.<sup>48</sup> The same time the number of enterprises organising further and in-service training for personnel was big and reached to 63% out of all companies. As shown in table 1.2, the bigger a company the larger the investments are going for development of human resources.<sup>49</sup>

Table 1.2 Evaluation of the labour force needs for training by enterprises

The size of a enterprise – number of employees	Evaluating labour force needs. %	Enterprises with training plans. %	Enterprises with training budget. %	Enterprises with training centres. %
10 - 19	37	8	6	2
20 - 49	47	10	12	2
50 - 249	54	24	21	4
250 - 499	67	54	51	26
500 - 999	88	70	70	27
1000 and more	100	84	90	58

Source: K. Ees mets. 2003. Adult Training in Enterprises. In: T. Märja (Ed.) Adult Training in Estonia: Needs and Availabilities, p.36.

The situation has changed for today. Most companies, especially the more successful ones, understand that their success, competitiveness and sustainability depend above all on the quality of personnel and so they invest big money into development of human resources. In total, the private companies invest during a year more than *a billion Estonian kroons* for training and retraining their employees.

As could be seen from the results of the last survey (see Figure 1.1), employers are ready to pay for the training of their employees (70%).

<sup>48</sup> Competitiveness and Educational Needs of Older Employees. Report of target-group survey. 2005. Tallinn

<sup>49</sup> K. Ees mets. 2003. Adult Training in Enterprises. In: T. Märja (Ed.) Adult Training in Estonia: Needs and Availabilities. P.33.

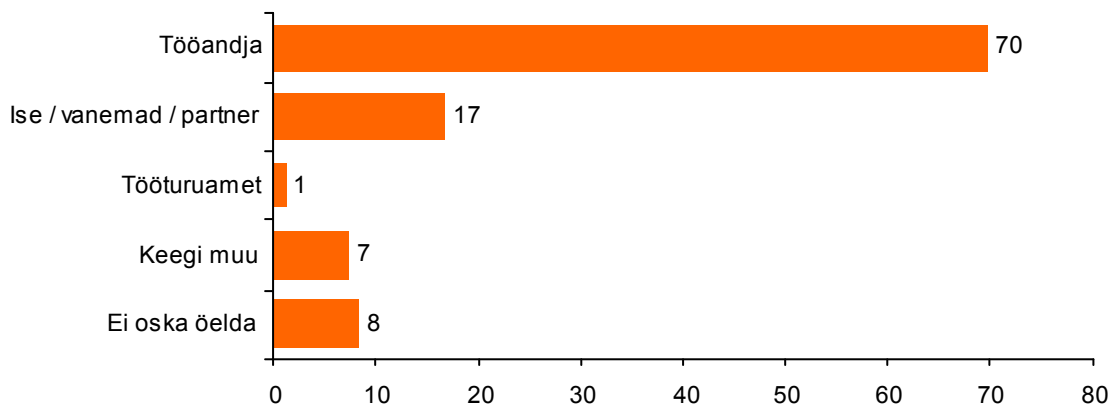


Figure 1.1 Funding the adult training in 2007 (%; N = 413)

70% - employer; 17% - learner or his/her parents or partner; 1% - Employment office; 7% - somebody else; 8% - don't know

Source: *Elukestev õpe 2007, Turu-uuringute AS*

### 1.2.4 Civil society support to ALE

The role of NGOs in supporting ALE is growing since 2004 thanks to resources allocated through the State Budget and the European Social Fund. The biggest adult education umbrella organisations (NGOs) – Association of Estonian Adult Educators (AEAE) Andras and Estonian Non-Formal Adult Education Association (ENAEA) are appointed by the Ministry of Education and Research as the managers of the lifelong learning programmes. Andras is responsible for –

- managing ALE network;
- widening the lifelong learning area all over the country;
- organising the Adult Learners Week, Adult Education Forum and Adult Learners Forum;
- providing adult educators' qualification course and in-service training for adult teachers;
- carrying out adult educator's qualification exam and handing out professional certificate to those who have deserved it;
- taking part in developing adult education policy; etc.

ENAEA is responsible for providing courses to adult people having low position in labour market.

One of the *Estonian Employees' Unions' Confederation* (EEUC) tasks is as follows:

- in co-operation with other countries' free trade unions to defend all the people's right *to education*, work and social security.

To strengthen social dialogue, EEUC together with its sister organisations initiated a project, aiming to training workers' representatives and preparing them for negotiations with employers. The goals are to develop negotiations skills on company level, with stress to financial and economic problems, and decisions what are influencing or could influence

situation on labour market, also employees' individual security questions in recruiting or reduction process.

The role of the *religious institutions* in ALE is not big in Estonia. Still, churches are organising Sunday schools for children and propose some courses for adults. Their role mostly is to give secure and social support to people who have lost a job, a home, family or something else important for survival. By doing it these institutions also teach people to cope with problems and get back their confidence and self-esteem.

### **1.2.5 Learners contribution to ALE**

In research conducted in 2001<sup>50</sup> it was indicated that the learners' contribution financing their studies was considerable – 30% of the learners paid themselves the full course fee (it was the same in 1995), and 7% paid partly for themselves (in 1995 – 5.5%). Thus, in 2001 37% of the learners paid for their studies to a smaller or greater amount. The inquiry also showed that half of the study courses included additional expenses – e.g. transport and lodging in addition to the tuition fee. The learners covered the extra expenses in 60% of the cases. There were more men among those, who paid for the course by themselves in full than women.

In the environment of liberal economy, employees are not motivated to invest into narrow, more specific qualification. Investments into general education or general basic skills are much more popular (due to their high “convertibility”). The organisation of exit from labour market does not back the risk of older employees to invest into the acquisition of a totally new qualification. The study made in 2003 revealed<sup>51</sup> that older employees prefer either the acquisition or updating of basic skills (computer and foreign languages) or the refinement of their specific professional skills. Focal group interviews clearly indicated that the better knowledge and skill level a person has, the more he is interested in its refinement and development, not in giving it all up. In this light, the expectations of employees and employers clash: one party is expecting the possibility of “leasing” employees with the most specific qualification any time for any period who would be familiar with the equipment and technology of their particular company. This means that they expect readiness from the labour market to supply any business idea at any time with workforce required for its realization. Employees, on the other hand, are expecting from the employers/entrepreneurs to take into account the quality of available workforce in their business plans and provide people with an opportunity to rely on their current knowledge and skill base.

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<sup>50</sup> Elukestva õppe vajaduste analüüs. (Analyse of Lifelong Learning Needs) Saar Poll Sotsiaal- ja Turu-uuringute AS. Tallinn 2001.

<sup>51</sup> K. Eesmetts. Adult Training in Enterprises. 2003.

From year to year, the readiness is growing and more people are motivated to invest into their education. In 2007 17% of adult learners (see figure 1.1) paid for training themselves.

### **1.2.6 Specific financial incentives in support of ALE**

State support for the adults for learning:

1) Obtaining basic education and general upper secondary education in the form of evening courses, distance learning and external study is free for students. Within the scope of the state commissioned education, free education is also provided for obtaining vocational education in the form of part-time study. Obtaining higher education in the part-time form of study is mostly provided for a fee, although there are some exceptions, for example teachers' training.

2) Professional and popular adult education is mostly provided for a fee. The learner or the employer shall pay for training. During the recent years, thanks to implementation of the European Social Fund, many professional training opportunities are notably cheaper or free of charge for learners or their employers. In 2007 a start was made with offering professional training courses free of charge in vocational educational institutions and institutions of professional higher education, the training is financed from state budget and the means of the European Social Fund.

3) Training for unemployed people is also free of charge. In addition to free training which should help a person to engage in work, many other labour market services (e.g. job arbitration, vocational counselling, work practice, support to begin entrepreneurship) and benefits (unemployment benefit, scholarship, travel and lodging benefit) are designated for the unemployed.

4) Students who study full time may receive study allowances and study loans.

5) The state supports employers and learners in financing of education also through tax benefits: professional training financed by an employer is not regarded as a specific benefit; in case of private person financing, income tax exemption applies.

Pursuant to paragraph 8 in Adult Education Act, *paid educational* leave should be guaranteed to every adult person/employee participating in ALE.

Persons employed under an employment contract and persons in public service shall be granted study leave in order to participate in training. Employers must, on the basis of a

notice from the relevant educational institution, grant to adult learners participating in formal education acquired within the adult education system study leave of at least 30 calendar days during an academic year during study sessions. It is possible to apply for additional leave for the purpose of finishing studies; the length of the leave depends on the educational level acquired: 28 calendar days in case of basic education; 35 calendar days in case of upper secondary education; 42 calendar days in case of acquiring higher education or defence of the Bachelor's degree; 49 calendar days in case of defence of Master's or Doctoral theses. The employer shall, according to the Adult Education Act, continue to pay an employee who is on study leave the established average salary for ten days and for the remaining days of the study leave shall pay at least the established minimum salary.

In addition to the established study leave, the employer must grant an unpaid holiday of up to seven calendar days at the request of the employee or civil servant and on the basis of a notice from the relevant educational institution at the time indicated in the request.

In order to participate in professional education, study leave of at least 14 calendar days in a year shall be granted on the basis of a request of the employee or public servant and a notice from the relevant educational institution, and the employee or servant shall continue to receive the established average salary.

In order to participate in popular adult education, unpaid study leave of at least seven calendar days in a year shall be granted on the basis of a request of the employee or civil servant and a notice from the relevant educational institution.

### **1.2.7 Benchmarks related to financing of AL**

Building on the Strategy for Lifelong Learning, in 2006 a start was made to elaborate a model for financing adult education that would increase access to in-service training and retraining for individuals.

In 2007 a model for financing adult professional education was elaborated by an inter-ministerial work-group, under which the three major ministries responsible for the financing of adult professional education in the future will be: Ministry of Education and Research, Ministry of Social Affairs and Ministry of Economic Affairs and Communications. The elaborated financing model was submitted in the end of 2007 for approval to the Government of the Republic as an annex to the Strategy for Lifelong Learning.

The elaborated model is addressed to the adult population in a wider context, it does not address or exclude specific target groups by professions (e.g. teachers, civil servants etc.). The ministries shall bear tripartite responsibility for the creation of opportunities for

professional training for adults, engaging, inter alia, the means of the European Social Fund and, upon the depletion of the means of the European Social Fund, secure sustainable activities that cover the needs of Estonia by state budget. The division of the areas of responsibility of the financing of professional training shall not preclude financing or co-financing adult education from other sources: an individual, employees, funds.

The Government of the Republic approved the model as an annex to the Strategy for Lifelong Learning 10/01/2008.<sup>52</sup>

## **2. Quality of Adult Learning and Education: Provision, Participation and Achievement**

### **2.1 Provision of ALE and institutional frameworks**

#### **2.1.1 Institutions responsible for managing and co-ordination of ALE**

Elaborating the new system for financing ALE the following model for managing and co-operation was agreed between ministries, and added to the Lifelong Learning Strategy:

The Ministry of Economic Affairs and Communications (MEAC), Ministry of Education and Research (MER) and Ministry of Social Affairs (MSA) shall agree on the division of areas of responsibility of the state financing for the three-tier financing of adult professional education and shall be trilaterally responsible for the creation of opportunities for the adult population in the field of professional training, while, *inter alia*, involving the means of the European Social Fund (hereinafter ESF) and, upon depletion of the means of ESF, secure sustainable activities that cover the needs of Estonia by means from the state budget.

#### **I TIER**

Responsible ministry: MEAC.

The target group comprises working adults whose professional training is financed through companies. The objective is to adjust the level of the knowledge and skills of the employees of the companies and make the training of the employees in the company habitual. Within the tier, management and team training as well as training facilitating competencies and qualifications is supported.

#### **II TIER**

Responsible ministry: MER.

The target group comprises working adults whose training is financed through educational and training institutions. This tier increases the availability of training for individuals who wish to participate in the training at their own initiative in order to enhance their competitiveness at the labour market. The training offered must be available also for the individuals having full-time jobs, i.e. the load and the time of the training must be suitable for the target group. If

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<sup>52</sup> Read more about the model chapter 2.1.1

necessary, besides professional training individuals will be offered training that allows them to improve their social skills, as well as language training, computer training, basics of enterprise, accounting and acting as a self-employed person.

### III TIER

Responsible ministry: MSA.

The target group of the tier comprises primarily the unemployed and the persons seeking work belonging to the risk groups of the labour market (persons with special needs, elderly persons, employees having received notice of dismissal). The training of this particular target group is financed through the Labour Market Board.

Identification of training requirements takes place on the basis of the individual plan for search for work in cooperation between the consultant of the regional department of the Labour Market Board and the individual. In-service training and retraining is financed in accordance with the work desired by the individual and labour market needs. Division of areas of responsibility regarding financing of professional training does not preclude financing or co-financing of adult education from other sources: individual, employer, funds.

Within the 2nd tier MER shall cooperate with the vocational schools and the Estonian Non-Formal Adult Education Association and, in regard of other activities, with Association of Estonian Adult Educators (AEAE) Andras.

AEAE Andras is responsible for the following activities:

- Popularise adult learning and motivate adult learners.
- Publish a journal for adult learners.
- Provide a serial of TV programmes to introduce good practices in adult learning.
- Provide every year the Adult Learners' Week (ALW), the Adult Education Forum (AEF) and the Adult Learners' Forum (ALF).
- Train adult educators and adult gymnasium teachers.
- Develop the qualification system of adult educators/ facilitators.
- Initiate a continuously operating adult educators' symposium.

Additional to above mentioned the following institutions are responsible for managing and co-ordinating ALE at national level:

- The State Chancellery is responsible for in-service training and continuing professional education of civil servants.
- Universities and Applied Higher Education Institutions are responsible for providing part time degree education (formal education) and professional continuing training (non-formal education) to adults.
- Local Governments are responsible for allocating resources coming from the State Budget to schools and pre-school institutions for pedagogues' continuing education.



## 2.1.2 Programmes

Table 2.1 Description of main ALE programmes approved by the Government and financed in the period 2007-2013

Programme (name and brief description)	a) Provider (please choose the appropriate one from below):			b) Area of learning (please choose the appropriate one/s from below):			c) Target group/s	d) Programme cost <sup>53</sup> Thousands EEK (kroons) <sup>54</sup>	e) Funding source
	Public/ State	CSO/ NGO	Private	General competencies	Technical skills	Knowledge generation, innovation			
<b>I Programme</b> Job-related training for employed adult through enterprises	MEAC Universities Institutions of higher education		Companies and adult training centres	Upgrading general competencies and qualifications	Leadership and teamwork competencies, entrepreneurship	Management of and adaptation with innovations	Personnel of enterprises and companies.  Men and women	298 000	ESF Private companies State Budget
<b>II Programme</b> Job-related training and re-training for employed adults through educational institutions. <u>Sub-programmes:</u> a) Job-related training b) In-service training c) Lifelong learning campaign d) Open applications round	MER Public schools  Vocational schools			Languages and computer skills	Competencies needed for special jobs	New training methods; innovative	Workers with medium or low qualification; retired people, young parents returning to labour market etc.  Men and women	142 000 136 000  Total: 278 000 Incl.  137 500 60 000  20 000  60 500	ESF State Budget
	Universities	ENFAEA  AEAE Andras  CSO/NGO	Training centres, schools						

<sup>53</sup> Total cost for the programmes from 2007 to 2013

<sup>54</sup> All numbers are provisional and may change during next years

<b>III Programme</b> Training for unemployed people and job-seekers.	MSA Vocational schools, Employment offices	NGO, social partners	Adult training centres	Basic competences	Skills needed for concrete jobs in certain companies and/or local communities		Unemployed people and job-seekers, people with special needs and belonging in risky groups in labour market  Men and women	487 178 228 639 Total: 715 817	ESF State Budget
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Source: Annex to Lifelong Learning Strategy; Memorandum Valitsuskabineti nõupidamisele. 20.12.2007

### Abbreviations

MEAC - Ministry of Economic Affairs and Communication

MER - Ministry of Education and Research

MSA – Ministry of Social Affairs

ESF – European Social Funds

ENFAEA – Estonian Non-Formal Adult Education Association

AEAE – Association of Estonian Adult Educators

### 2.1.3 Linkages between formal and non-formal adult education

As a good example the activities of the Tallinn University in fostering adult education and lifelong learning could be presented. The university has THE good-will co-operation agreement with the national umbrella organisations AEAE Andras in training adult trainers, in developing adult educators/ andragogues qualification system, in research, and also in organising national and international seminars and conferences in adult education. The Tallinn University, especially the chair of andragogy and centre for continuing education, have a big role in organising Adult Learners Week and Adult Education Forum. Both are active partners to AEAE Andras as the main co-ordinator of the Week. The Tallinn University was also involved in AEAE Andras Grundtvig 3 project providing International Projects' Management course.

During last years, linkages between formal and non-formal adult education sectors have become stronger thanks to APEL<sup>55</sup> project. Formal institutions are accepting knowledge obtained in courses organised by non-formal institutions, even by NGOs.

### 2.1.4 ALE leading to certificates and/or national awards

The system of degrees, diplomas, certificates and/or national awards in Estonia is as follows:

- a) Tallinn University delivers *bachelor, masters and doctoral (PhD) degree* in adult education for those who pass through a full study course in andragogy.
- b) Tartu University grants *masters and doctoral degree* in adult education.
- c) Many institutions providing courses for adults issue a *certificate* to a learner at the end of the course, including information about subjects taught and in what amount, if he/she participated as a minimum in 75% of the studies. These certificates are acknowledged by higher education institutions and employers. Certificates issued at the end of the courses were considered important by adult learners<sup>56</sup>, as they give the people the right to act in a particular vocation. The age group of 20-39 evaluates a certificate more and mainly attends certificate courses. With regard to older people, certificates are rarer and not considered essential. As shows a survey<sup>57</sup> a certificate proving the right to work in a certain job was issued in 58% of the courses. 64% out of those without the certificate received the credentials of passing the course. 1/6 of the learners did not receive any document at all.

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<sup>55</sup> APEL – Accreditation of Prior and Experiential Learning

<sup>56</sup> Read more: T. Märja. 2003. *Needs for lifelong learning in Estonia*. In: Adult Training in Estonia. Needs and Availabilities, p. 25.

<sup>57</sup> Saar-Poll, 2001

- d) If the certificate is not issued by adult training centre a *credential* will be issued at the end of the courses.
- e) Starting from 1999 Association of Estonian Adult Educators Andras delivers once a year (during Adult Learners Week) *awards* for the -
- Learner of the year.
  - Adult educator of the year.
  - The most learning friendly organisation.
  - The most learning friendly local government (from 2003).

## 2.2 Participation in ALE

### 2.2.1 Statistical data on participation

Analysis of adult learning opportunities in Estonia shows that learning opportunities and access to education varies among Estonian citizens greatly, social and regional differences are growing, and educational stratification is getting deeper. In the same time, places of work are decreasing and changes in product and service markets, also in organisations are taking place. Workforce as well as Estonian population is aging and decreasing in numbers.<sup>58</sup>

The number of adult learners in Estonia continues to be low. The participation rate has fluctuated from year to year, with the highest rate in 2007 at 7.0 % (see table 2.2). The EU objective for 2010 is 12.5%.

Table 2.2 Participation of persons aged 25-64 in ALE 1998 - 2007

Learners age group 25-64	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
<b>Participated in ALE ...</b>	6.3	6.5	6.5	5.4	5.4	6.7	6.4	5.9	6.5	7.0
<b>In formal education ...</b>	1.4	2.0	2.5	2.4	3.2	3.5	3.8	3.8	3.5	3.6
... general or voc. education	0.4	0.3	0.3	0.3	0.4	0.4	0.5	0.5	0.5	0.5
... higher education	1.0	1.7	2.2	2.0	2.8	3.2	3.3	3.3	3.1	3.1
<b>In continuing training ...</b>	4.8	4.7	4.1	3.1	2.3	3.4	2.8	2.4	3.4	3.7
... in-service training	3.4	3.0	2.7	2.0	1.6	2.1	1.9	1.6	2.3	2.4
... popular adult education	0.8	0.6	0.5	0.3	0.2	0.4	0.4	0.3	0.5	0.6
<b>Other</b>	0.3	0.2	0.4	0.3	0.2	0.2	0.1	0.1	0.1	0.1

Source: Eurostat

\*Percentage from the total number of age group

<sup>58</sup> Lifelong Learning Policy in Estonia. LLL 2010 SP1 Country Report, p.10

Widening the age group from 15 to 74 years the participation rate is decreasing (see table 2.3). It was higher during the last years of the 1990s, and shows again a little growth from 2006 and 2007. It could be the result of the demographic situation in Estonia and shortage of participants in the labour market. It means that older people are prolonging their active working period and for that have to refresh their knowledge and skills.

Table 2.3 Participation of persons aged 15-74 in ALE 1998 - 2007

Learners age group 15-74	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Participation in ALE Total	4.2*	4.0	3.5	2.7	1.9	3.0	2.3	2.1	2.8	3.1
Job-related training or re-training	2.7	2.4	2.0	1.6	1.3	1.6	1.4	1.2	1.7	1.8
Popular adult education	1.0	0.9	0.7	0.5	0.3	0.7	0.5	0.5	0.6	0.8
Other	0.3	0.2	0.3	0.3	0.2	0.2	0.1	0.1	0.1	0.1

Source: Eurostat

\*Percentage from the total number of age group

Comparing participation rate by gender the difference between men and women is noticeably in favour of women (see table 2.4). In total in age group 25-64, 9.2% of women are learning. The corresponding number of men is only 4.5%.

Table 2.4 Participation in adult education by gender and age in 2007

Age group	Total	Men	Women
25-34	12.2	9.3	15.2
35-44	8.6	4.5	12.5
45-54	3.8	1.9	5.4
55-64	2.6	..	3.7
25-64	7.0	4.5	9.2

Source: Statistical Office

The number of participants in lifelong learning by educational background differs greatly. It is obvious that the higher the educational background the more people like to continue learning. When in 2006 11% persons with higher education took part in learning activities, the number of persons with secondary education was 4.9% and basic education only 1.5% (see figure 2.1).

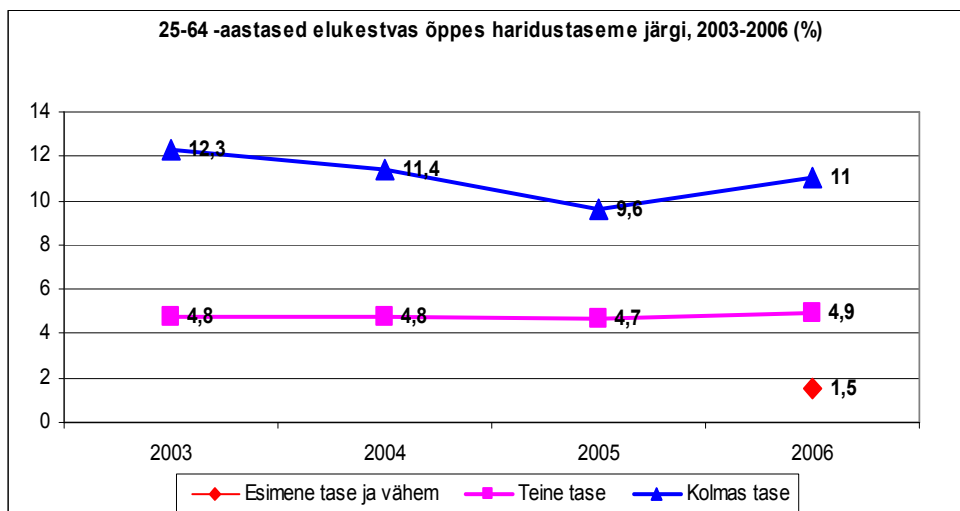
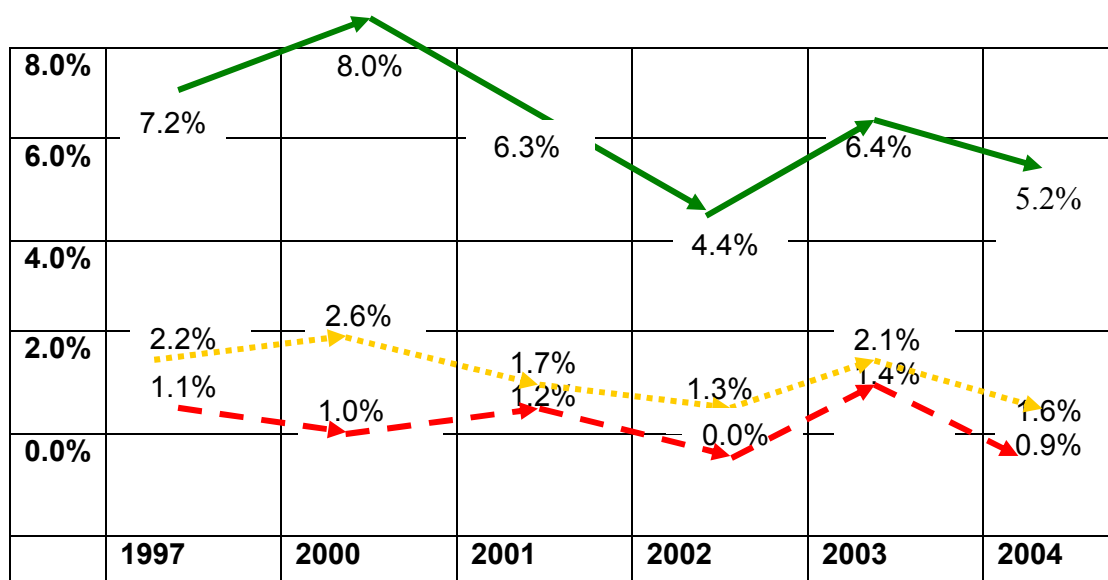


Figure 2.1 Participation of individuals aged 25-64 in lifelong learning according to educational background in 2003 – 2006 (learning period within the last 12 months).

▲ higher education; ■ secondary education; ◆ primary education and less

Source: Memorandum to the Government meeting 20.12.2007

The participation rate is significantly lower (see figure 2.2) when age group is widened - much younger and older people are included to the random sample. Difference in numbers is resulting also from using another methodology for data collection.



→ Tertiary level    → Secondary level    → Primary level

Figure 2.2 Proportion of adults (aged 15-74) who participated in adult education and training during the previous 4 weeks by educational levels (% of population)

Source: Statistical Office; Ministry of Education and Research

The numbers of participation show little growth in 2007. The participation rate with basic education (primary level) background is now 1.6%, secondary level education 5.5% and higher education (tertiary level) 11.3% (see table 2.5).

Table 2.5 Participation of individuals aged 25-64 in lifelong learning by gender and educational background in 2007

Level of education	Total	Men	Women
Basic education	1.6	..	..
Secondary education	5.5	3.6	7.7
Higher education	11.3	8.6	12.6

Source: Statistical Office

As the result of a good work in continuous development of the policy of adult education and implementation of the strategy of lifelong learning the participation in popular education (table 2.6) and adult general/formal education (tables 2.7 and 2.8) are constantly growing.

Table 2.6 Participation in adult popular education

Number of ...	1997	1999	2001	2003	2004	2005	2006	2007
Learners	38 293	38 818	34 770	37 714	42 536	31 049	23 341	23 898
Centres	59	64	42	47	49	49	49	49

Source: Ministry of Education and Research

Table 2.7 Participation of adult learners in general/formal education in the academic year 2007/2008

Study form / Study level	Distance learning, evening classes, and/or part time learners number	Percentage from the total number of students	Average age
General secondary education	6890	4.3%	22,56
Vocational secondary education	762	2.8%	31,2
Higher education	7841	11.5%	28,1

Source: EHIS

The number of adult learners is quite big in secondary general and higher education level and the trend is increasing. Looking the figures and percentages in vocational education we have to accept the wish to acquire vocational education by adult learners is quite small.

Table 2.8 Participation of adult learners in basic and secondary education 2007/2008 according to gender

	Total	Men	Women	Average age	Percentage from the total number of students
<b>Basic education</b>	1372	867	505	20,63	1,1%
<b>General secondary education</b>	5518	2058	3460	23,14	14,1%
<b>TOTAL</b>	6890	2925	3965	22,56	4,3%

Source: EHIS

The table 2.8 shows superior number of women learners, especially on general secondary education.

### 2.2.2 Non-participation and groups difficult to reach

Unequal access to education and learning opportunities, also deepening educational stratification predisposes formation of negative beliefs and learning conceptions, resistance to learning and forsaking learning and learning opportunities among resource poor Estonian citizens. In the long term, this kind of situation threatens cohesion of the Estonian society. Based on the research conducted in Estonia, it can be stated that cooperation of institutions that provide learning opportunities for adults does not rely on stable relations, therefore there is no effective information sharing, no common understanding regarding goals, priorities and possible joint activities.<sup>59</sup>

As a result of the survey carried out in Estonia, it can be claimed that the factors hindering adult learning can be divided into two groups: obstacles that depend on the persons themselves and obstacles deriving from the social environment. The former are, for example, lack of interest, insufficient person-related and material resources, limited life and learning experiences, health, etc. The latter include, for example, lack of sufficient access to training opportunities, the negative attitude of society to adult learning.<sup>60</sup> Studies and statistics confirm that in Estonia it is mostly young and middle-aged people with a higher level of education who participate in training<sup>61</sup> (see figure 2.2), and those whose position in the labour market is more favourable. This means that there are few opportunities for participating in adult education for those people in particular who do not have access to study and training opportunities, or lack the resources – for example, good education, good

<sup>59</sup> Märja 2002, Märja & Jõgi. 2001.

<sup>60</sup> "Combined effect of andragogical, social and psychological factors on the formation of the study methods, study preparedness and training activity of adults, in the context of lifelong learning". Summary of the study. Larissa Jõgi, 2006

<sup>61</sup> First level – basic education; second level – secondary education; third (tertiary) level – higher education, secondary specialty education following secondary education.



position in the labour market, money, time, family support, health, internal motivation, readiness to learn. This group primarily includes people in the rural areas with lower than average incomes, people with no specialty training, people beyond middle age, who face the risk of falling out of the labour market, the training of whom provides no interest for the employers, young parents, people with special needs, prisoners and released ex-prisoners, immigrants and people with special educational needs.

One reason why the participation rate in adult education is very low in Estonia compared to other EU countries could be seen as the lack of, or insufficient operation of, support structures (counselling services, compact and accessible information on study opportunities, quality assurance, financing scheme, recognition of prior learning and work experience – APEL,<sup>62</sup> modular study programmes). Nevertheless, some steps have already been taken during the first programming period to initiate these structures – the principles for APEL, and the possibilities for its implementation are being developed, projects for the training of the trainers have been carried out, as well as other training targeting an increase in quality. In some regions there is provision of information on study opportunities, and the counselling of learners in training centres has been initiated, the principles for funding adult training have been prepared, and these are planned to be developed and implemented during the next period. The increasing participation of adult learners in initial training can also be mentioned as a positive trend. Whereas the share of over-25 year old students in 1993 was 22%, by 2005 this share had grown to 38%.

To *eliminate the barriers* to participation in ALE in terms of policies, educational institutions, enterprises', practices and potential learners' motivation is as follows:

- The permanent goal of lifelong learning is increasing the participation number, widening the access to learning in geographical, social and economic terms.
- Training providers/centres' closeness to potential learners, as better delivering of information helps to increase participation. It is important to use the premises of schools and other educational institutions in local community as training facilities, also enlarge possibilities for virtual learning.
- Important drive for an adult person for investing his/her own resources (time and money) into learning is acknowledgement. The status of an adult learner, and organisations, contributing to its development through educating personnel, must be highly valued by society. In Estonia the learning organisation award has been distributed already several years.

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<sup>62</sup> APEL – Accreditation of Prior and Experiential Learning.

- Co-operation between different types of training providers, especially open universities and other institutions of the same type should be approved, favouring students' mobility.
- The system of adult gymnasiums and evening schools should be more flexible and give the possibility to learn by subjects.
- Higher education should be accessible for older people by new legislative rules. The organisations supporting that kind of education by paying the tuition should be free of additional taxes.
- Standardisation of curricula should motivate better co-operation between different educational institutions.

In 2001, the reasons for *not learning* were studied in details, when a survey about needs and possibilities for lifelong learning was conducted.<sup>63</sup> The prevailing reason for not learning is *old age* (38% of the respondents). In the age group 60+ it was regarded as the reason in 76% of the cases. *Lack of need* (27%) ranks second and *lack of money* third (23%). The latter was also the main reason for the income group of up to 1000 EEK per family member (43%).

In case of younger people, the prevailing reasons are *the lack of money* and *the lack of time (due to different causes)*. The age group 20-29, comparing with other age groups, pointed out *lack of interest* and *lack of suitable courses*.

There were discrepancies between men and women as well. Men stress more *the lack of need, the lack of time (due to work)* and *the lack of suitable courses*. Women complain about *old age, lack of money, lack of time (due to homework)* and *lack of interest*.

Non-Estonians (11% of respondents) claim that the reason for not studying is that there are no courses provided in their mother tongue. If there were such courses available, the percentage of non-Estonian learners would rise considerably.<sup>64</sup>

### 2.2.3 Learners' motivation

The learners stated a number of different motives for studying, making decision/choice between 16 general motives. The results are shown in table 2.9. The motives, such as *the fear of losing the job, the wish to change profession or employment, being unemployed* or *the hope for a permanent job*, were mentioned in 18 % of cases. These motives are strongly connected to the person's everyday life and have nothing to do with career planning.

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<sup>63</sup> See: Analyses of Lifelong Learning Needs. 2001.

<sup>64</sup> Read more: T. Märja. 2003. *Needs for lifelong learning in Estonia*. In: Adult Training in Estonia. Needs and Availabilities, p. 30.

Table 2.9 Motives for studying in 2001 and 1995

The motives for studying	% of the learners in 2001	% of the learners in 1995
1. Self-development	54	66
2. Enhancing occupational Qualification	40	41
3. Enhancing competence	34	37
4. Sent by the employer	31	The category not indicated
5. Wish to maintain a good position in labour market	24	The category not indicated

Source: *Adult training in Estonia: Needs and Availability*, p.27.

The research of 1995 revealed the same motives, but these were not so prevalent – *the fear of losing the job* (13%), *the hope for employment* (16%). One of the motives was *looking for a change* (11%), in 1995 it was even higher (14%). Most of the learners feel a pressure coming from society, labour market and from the market economy system. The elderly people are studying more with the aim of self-development, enhancing professional qualification and competence in order to be ensure a better position in the labour market. These are important motives for younger people too, but it must be pointed out that they are sent to courses more by employer, whereas older people make the choice by themselves. In addition to that, younger people have career aims, and they hope for higher income.

There are some differences in the motives of men and women. Men state the motives as follows: *enhancing professional qualification, sent by employer, maintaining good position on labour market, career aims, hope for higher income and finding new friends*. Most frequent motives for women are *self-development, enhancing competence, looking for change and fear of losing the job*.

#### 2.2.4 Measures taken to mobilise learners and increase participation in ALE

There are several measures taken in Estonia to mobilise adult people to learn. Proceeding from the research findings about reasons for non-participation, the measures are divided into the following blocks:

- 1) legislative measures
- 2) financial measures
- 3) organisational measures
- 4) campaign/ agitation

The main legislative measures motivating adults to learn are:

- *paid educational leave* giving each person the right to learn 14 calendar days during a year while maintaining average salary. Special rights for educational leave are for

those who are learning/finishing secondary school or graduating university. (Adult Education Act)<sup>65</sup>

- *exemption from income tax* in the amount spent for training (Income Tax Act);
- unemployed are entitled to apply for *employment training* for improvement of the level of labour market competitiveness. (Employment Service Act).

Financial measures are as follows:

- training courses *free of charge*;
- training courses with *low instalment of finances by the learners*;
- extending the right for *student loan* for adult students.

Organisational measures are linked with adjusting the time and place for courses to better accessibility. The motto is – *bring courses close to home!* But there are also others like organising a nursery service while young mothers are in the classroom etc.

In order to raise the learning motivation for students and adult learners it is necessary to bring the training programmes for further training and retraining, and the initial training study programmes, *into accordance with the professional standards*. The development of the qualifications system proceeds from the principle that it must be transparent, comparable and relatable to the European Qualifications Framework for Lifelong Learning.

It is important to *make information and the various types of counselling available* to all those who need them. This means that uniform and user-friendly pedagogical-psychological, professional and career guidance services must be developed, as well as a publicity system. The services must have collated information on the needs of the labour market and the learning opportunities, thereby helping both young people and adults to make the right decisions, from both their and society's standpoints. Pedagogical-psychological counselling will create the preconditions for the timely discovery of learning problems and the prevention of young people dropping out of the educational system. In order to receive assistance in career planning, in the acquisition of education, and in issues that pertain to participation in training, the children, their teachers and parents need different counselling depending on their requirements (pedagogical-psychological, career and health-based, etc).<sup>66</sup>

The best agitation measures are (read more in chapter 1.1.1):

- Adult Learners' week.
- Adult Learners' Forum.
- Adult Education Forum.

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<sup>65</sup> Read more in chapter 1.2.6 in current report.

<sup>66</sup> Operational Programme for Human-resource Development, pp. 77-78.

## **2.2.5 Specific target groups in ALE**

In widening the access to ALE particular attention has to be paid to persons belonging to risk groups. In Estonia these groups are:

- *young people and adults without professional qualification;*
- *dropouts from education system;*
- *people with special needs;*
- *people living in rural regions and with income level below the average;*
- *older than middle-aged (45 and above) people, threatened by dropping out of the labour market;*
- *non-Estonians not speaking Estonian.*

Both, general competences (languages, information and communication technology), and special professional knowledge, skills and competences, need to be trained and refreshed.

## **2.2.6 Benchmarks in relation to participation**

Target set by the Government of Republic is that the rate of participation in lifelong learning among the residents aged 25-64 has to grow from 6.5 % in 2006 to 11.5% by 2013. The indicator is included in the Lifelong Learning Strategy 2005-2008. Target level after 2008 will be determined in the future. The indicator shows the readiness and opportunities of people to participate in further training and retraining.

## **2.3 Monitoring & evaluating programmes and assessing learning outcomes**

### **2.3.1 Methods of assessment**

Having hard competition on the training market each adult training centre, private schools, NGOs, providing courses for adults, open universities and/or continuing education departments of universities, also adult education departments of vocational schools and applied higher education institutions continuously assess their training programmes, curricula, organisation etc. Without that the sustainable existence of such kind of institutions is not conceivable. Methods for assessment are:

- continuous analysis of training activities by the teaching staff and managers of training centres,
- involvement of learners to assessment process – feedback after each module and/or training session,
- observing colleagues' training,
- trainers self-assessment.

### **2.3.2 Tools and mechanisms of monitoring and evaluation**

One of the most important and efficient tools for evaluation is the training licence given by the Ministry of Education and Research to an adult education centre. For applying for the licence a centre has to prepare and present to the evaluation group the following documents:

- description of the target group(s) the training is meant for;
- a detailed curriculum by what the training will be provided,
- a list of trainers, their qualification level,
- detailed description of classrooms and permit from the health care office using these rooms for training,
- available teaching equipment,
- training schedule,
- additional social care possibilities like nursery, for example,
- description of document the graduates will receive when finishing the course.

The licence is valid for five years. After that time all mentioned documents should be updated.

Adult learners taking courses in training centres and/or private schools having the licence from the Ministry of Education and Research are entitled to an exemption from income tax in the amount spent on training.

### **2.3.3 Using the results of evaluation**

The results of assessment and evaluation have been used for continuing improvement of study programmes and curricula. The learners' proposals for amendments in programmes, also changing (if necessary) teachers are always carefully discussed and considered.

### **2.3.4 Reasonable benchmarks**

- ❖ Continuous renewal of the study programmes and curricula.
- ❖ Development of the trainers' competences and upgrading of their qualification.
- ❖ All adult educators are full time professionals.

## **2.4 Adult educators/facilitators' status and training**

### **2.4.1 Qualification of adult educators**

The development of a professional qualifications<sup>67</sup> system for adult educators has been initiated in Estonia during a couple of last years, which is a precondition for guaranteeing the

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<sup>67</sup> **Professional qualification** – the level of competence in the given profession that is accepted on the basis of either regulated post-experience or international requirements.

quality of ALE. The systematic description of qualifications from the *second* to the *fifth* level ensures seamless transition from one level to the next and creates accordance with Estonia's other professional qualifications and European qualification system, as well as enabling the harmonisation of study programmes. The possibilities for proving professional qualifications by adult educators have also been extended – in 2004 the rights to prove a qualification was accorded to three levels (III, IV and V level). From the year 2007, it is possible to acquire adult educator's professional qualification for four levels (II level was added, giving the possibility to apply for the qualification to less experienced adult educators). Thus the system of professional standards of adult educators and the according to levels competences continued development, as well as bringing the training programmes into accordance with the levels of professional standards.

The new professional qualification standard is based on adult educator's competences, what imposed to change the curriculum of adult educators' training. The most important competences, forming the bases for the adult educator's qualification, are as follows:

The adult educator –

- Defines the objectives of the training based on the educational needs. Prepares a training programme targeted at the achievement of a result that is systematic and logically structured. Assesses the level of the achievement of the training result.
- Manages purposefully the learning process, while complying with the principles of purposefulness and feedback. Applies the methods of process monitoring, acts flexibly and creatively under the changing circumstances and regarding problem solving. If necessary, uses his or her negotiating and conflict solving skills. Uses different training methods and techniques, based on the set objectives, needs of learners and the specifics of the subject.
- Models a learning environment that is compliant with the learning objectives and facilitates learning. Creates cooperation networks between the stakeholders and affiliated groups which are relevant from the viewpoint of the efficiency of learning. Applies the methods for management of group processes. Supports shaping of positive attitudes towards learning and learning motivation; Creates an atmosphere that is both stress-free and reciprocally supportive. Supports the development of the learner through the increase in self-confidence and self-guidance skills.
- Accounts for the psycho-physiological and social peculiarities of an adult. Provides aid to the learners for setting objectives, planning studies and acquisition of learning skills. Takes into account the individual special needs of the learners. Values the level of the prior knowledge and skills of the learner and uses their previous experience as a common resource. Addresses the study group as a subject, fostering support provided to each other and the reciprocally developing influence of the learners.

- Reflects his or her activities; Commands and applies the methods of self-analysis. Sets the objectives, plans and assesses his or her activities. Is constantly engaged in self-development.
- Performs complex duties: manages educational and training processes taking place on the institutional or organisational level, prepares study programmes, arranges monitoring of processes, analyses results and makes decisions.
- Compiles training teams on the level of an organisation or its subunit, arranges division of tasks between the members of the team. Motivates employees and assesses the results of their activities. Creates conditions for the professional development of each team member.
- Analyses the learning requirements of target groups, forecasts volume of training and prepares programmes.
- Participates in the planning of training programmes for the representatives of other cultural and language environments. Prepares training programmes in foreign languages and delivers trainings. Models an environment that facilitates learning in the study groups that represent different nations and different cultures.
- Makes proposals regarding refinement of adult education and educational system as a whole. Participates in the discussions regarding development of and/or amendments to the concept of adult education and strategy for lifelong education. Explains the need for the promotion of adult education to the educational officials and to the general public and motivates adults to learn. Uses the framework documents of the European Union directing the development of lifelong learning in his or her activities in facilitating the adult education in Estonia. Provides counselling to the persons submitting project applications regarding the preparation of EU projects addressing the facilitation of adult education and their financing opportunities.
- Actively participates in the work of some international organisation engaged in the policies, practice and/or research in Europe or in the world, mediating required information and the experience of other countries into Estonia and sharing Estonian experience with the others. Participates in the international cooperation projects in the area of adult education or lifelong learning. Communicates with the representatives of different cultures and integrates stakeholders in order to achieve project objectives. Recruits international project teams and acts as the leader of these teams.
- Participates in the conferences and/or seminars in the field of adult education and lifelong education both in Estonia and abroad. Chairs plenary sessions, modules or activities of work-groups at the conferences and submits summaries of these activities.



The higher the qualification level the more competences are expected from the educator. All adult educators despite their qualification level have to have the following personal characteristics –

- 1) Learning ability
- 2) Readiness for co-operation
- 3) Commitment
- 4) High level stress management
- 5) Tolerance
- 6) Self-control
- 7) Decision-making ability
- 8) Adaptability
- 9) Open-mindedness
- 10) Creativity
- 11) Determination
- 12) Responsibility

Holding professional certificate of the adult educator shows the level of professionalism of the educator and is a means for increasing the competitiveness on the market of training services, serving also as a guarantee of professionalism for the user of services of the training provider holding an occupation - the employee or the contracting entity.

Acquisition of the occupation of the provider of adult training is the opportunity and not an obligation for the training provider.<sup>68</sup> Starting from 2004, qualification of adult educator has been attributed by the Commission to 101 persons.

#### **2.4.2 Adult education as a profession**

Adult educator is recognised as a profession in Estonia. According to the definition -

*An adult educator is a specialist intermediating skills and/or knowledge to adult people, directing their formation of comprehension and attitudes, and supporting the self-development of adults in adult general education, job-related and/or continuing professional training, popular education courses, study circles and other circumstances related to a purposeful learning situation. He/she creates a positive and motivating learning environment that assists the learners in accomplishing the goals of their learning in the best possible manner. In order to reach better results, he/she includes additional resources (other instructors, specialists, learners etc), if the need will become evident.*<sup>69</sup>

The professional qualification of the adult educator is defined as an additional/partial qualification, the basic being the profession or speciality acquired either at a university or in a

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<sup>68</sup> Until today the application of the adult educator's qualification is on voluntary bases.

<sup>69</sup> Professional Standard. Adult Educator III, IV and V, p.5

vocational educational institution (giving to an educator the subject he/she is teaching – for example *psychology, literature, math, andragogy, etc.*).

Although the adult educators' professional qualification has been assigned to more than one hundred trainers, the number of full time adult educators in Estonia is not high. Only the most successful business training centres have the position in the training market and resources enabling them to recruit the full time trainers' team. Most adult educators are working with part time agreements, and usually are teaching simultaneously in several adult training centres and/or university departments.

When an adult training centre or school or department wants to apply for the licence from Ministry of Education and Research, they have to have a list of adult educators who affirm with signature that they will perform their tasks in training according to the curriculum approved. This kind of a request guarantees the quality of the training. One adult educator could be in several lists.

In Tallinn University, there is a department of andragogy providing bachelors' and masters' degree studies in adult education, but the graduates are qualifying as managers in adult education, not the professional adult educators.

### **2.4.3 Proportion of adult educators in relation to overall number of teaching personnel**

The number of adult educators is considerably smaller than the respective number of pedagogues, teaching in basic schools and gymnasiums, and academic staff at universities. While the number of pedagogues is more than 18 thousands in Estonia, the number of adult educators (by the experts' opinion) is around a thousand. Until now, only 101 of them have applied for and been approved the professional qualification of adult educator.

### **2.4.4 Employment and remuneration in ALE**

As said earlier, most adult educators are working on a part time basis having no permanent salary but honorarium for number of teaching hours. Those adult educators employed by (mostly) business training centres generally have agreed with employer monthly salary and additional income (extra payment) for each delivered lecture and/or training session, provided by them. At the higher educational institutions and vocational schools teachers/lectures and academic staff have full time employment and their working hours planned for adult professional or continuous training are usually added to the general number of lectures foreseen for different job/profession/occupation. The same model is put into practice also in adult gymnasiums.

Remuneration for lectures/training for part time adult educators differs greatly. It depends on the institution engaging the person to deliver a training programme and the academic

level of the educator. For example at public institutions like universities the honorarium for an academic hour is between 15-25 euros (net) per an academic hour. At adult training centres providing courses as a part of a European Social Fund project the remuneration could be higher and reach up to 75 euros (net) per an academic hour. Adult business training centres pay to their trainers a lot more. The highest payments could be reaching to 1000 (gross salary) euros per hour.

### **3 Research, Innovation and Good Practice**

#### **3.1 Research in the field of adult learning**

##### **3.1.1 Key studies in adult education**

Key studies in adult education in Estonia undertaken within last five-seven years and introduced in this report are the following:

- 1) *Poverty study (1999).*
- 2) *Analyses of Lifelong Learning Needs (2001)*

In 2001 a survey was conducted<sup>70</sup> to collect consistent information about learning needs and opportunities of adults. It was, however, necessary in order to think more seriously about implementing the Lifelong Learning Strategy, creating learning environment, and to set a high value on adult education. The current research is a significant step ahead for obtaining more accurate information about the opportunities and needs of adult degree, job related (professional, vocational and occupational) and popular education in Estonia at the beginning of the 21<sup>st</sup> century. The analysis outlines the most substantial results of research. The research does not include all forms of adult education, since adult popular education was not included in the study.

Some results presented here show the level of implementation of the Lifelong Learning Strategy. The aim of the survey was to get information about the learning needs and opportunities of adult people. One thousand and eight people at age of 15-74 were questioned in their homes in the form of an interview. Respondents were chosen by the method of random choice. That enabled us to compare the results of different regions.

##### **3) *Competitiveness and Educational Needs of Older Employees (2005)***

The study was focused on older employees aged 45 and above, whose situation at the labour market was the most complicated. One reason for making this choice was the fact that this category allows also the exploration of the training needs of other labour market risk

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<sup>70</sup> Analyses of Lifelong Learning Needs. 2001. Saar-Poll.

groups (for instance women, low-income employees). Particular attention was paid to the possibilities of improving the competitiveness of women and the exploration of their training needs. This is important as women stay on the labour market for a considerably longer period due to the increase of their pensionable age. This, on the other hand, requires constant updating of their knowledge and skills to avoid getting pushed out of the labour market. When selecting the counties for research, the most problematic ones from the aspect of labour market issues were chosen – the counties of East and West Viru, the counties of South-East Estonia, but also others, if possible.

The purpose of this study can be phrased as follows:

- on the basis of different sources, find out the labour market status of older employees, the risks they are exposed to and their opportunities (also by gender), describe the ideas of the target groups (employers, experts, potential learners i.e. employees aged 45 and above) on the need of learning;
- synthesise and generalize these ideas into one single concept regarding the opportunities of improving the competitiveness of older employees (including women) in labour market and their training needs.

#### *4) Lifelong Learning (2007)*

The aim of the survey was to find out:

- How many adult people participated during last four weeks or twelve months in training or attended school?
- In which educational level there were more learners, and in what kind of courses adults mostly participated?
- What were the sources for financing learning activities?
- What kind of ALE adults plan to participate during the next twelve months?

All people in the age group 25-64, living permanently in Estonia, were potential respondents. By the information of the Estonian Statistical Office, the number of eligible persons was 705 976 on January 1<sup>st</sup>, 2007.

### **3.1.2 Major questions addressed**

Most important questions addressed in key studies in adult education result from the situation in the labour market but also in the Estonian society in general. There are several important criteria. One is the *demographic situation* (ageing of population and declining of birth rate). As the result of the natural population growth emigration, Estonian population decreased by almost 12.5% between the censuses carried out in 1989 and 2000. The share of people aged 60 and above in population was 21.8% in 2003; a rough calculation shows

that the rate will reach 25% by the year 2020.<sup>71</sup> The ageing of population, bringing about the *ageing of labour force*, has become a burning issue in Estonia. Against the background of *decreasing employment and workforce*, it has become inevitable to foster continuing of older employees in the labour market. How could we guarantee that? One precondition is improvement of their labour market competitiveness by creation of opportunities for the participation of older people in training and retraining. *Are the elderly people ready to learn? What is the employers' attitude towards older people's learning activities? Are they ready to support it financially?* These are the key questions waiting for answers.

The second domain is the participation of *risk groups* in training. While widening the access to ALE, particular attention has to be paid also to persons belonging to other risk groups than older people. These groups are: young people and adults without professional qualification; educational system dropouts; people with special needs; people living in rural regions and with income level below the average; older than middle-aged (45 and above) people, threatened by dropping out of the labour market; non-Estonians unable to speak Estonian. The research questions are as follows: *Do above mentioned risk groups have access to lifelong learning? Who is paying for their courses? What are the main subjects, people from risk groups are interested and ready to learn? Do general competences (languages, information and communication technology), technical skills and/or special professional competences need refreshment or personal characteristics strengthening?*

We are also interested in the composition of the learners; their learning needs and motives and learning preferences by subjects. *Analysis of the socio-demographic criteria of learners and type of training is of the big interest.*

Last studies in adult education are mostly focusing on the learners' participation rate. Main questions: *How many adult people were learning during the last four weeks (Eurostat) or during the last year? How many of them participated in general education leaving to certificate, how many in job-related training or popular/liberal adult education? Who pays for the training?*

### **3.1.3 Key findings**

Poverty study conducted in 1999 indicated that low educational level means higher individual poverty risk. 31.3% of the labour force with elementary education lived in poverty. The share of the poor among the labour force with basic education was 26.5% and among those with upper secondary or higher education 17.9%. In recent years, the number of *basic school dropouts* has increased. About one thousand young people fail to continue basic school studies every year. According to the year 2000 census there are 12,000 people

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<sup>71</sup> Lifelong Learning Strategy 2005-2008, p.19.

without basic education in the 17–49 age group; pursuant to the data registered at local governments, the number of people without basic education aged 17–24 is approaching 10,000 and among those aged 25–49 up to 11,000 persons. Both labour force surveys and census results reveal that people without basic education have poor perspectives for finding a job; they have more serious subsistence problems and most frequent contacts with law infringement. State Audit Office analysis revealed that nearly 13% of the people without basic education aged 18–55 are imprisoned persons or probationers.<sup>72</sup>

#### *Analysis of Lifelong Learning Needs.*

According to the survey<sup>73</sup>, in the year 2001 13% of the people in the age group 15-74 were involved in different type of educational activities, such as evening courses, correspondence or non-resident studies, complementary or continuing education, job - related training or retraining. Taking account the size of population in Estonia, one can say that the number of those having studied during the year 2001 was approximately 130 000.

The results showed notable differences in the number of learners with regard to the **nationality**. Among Estonians the average proportion of learners exceeded 15%, while among non-Estonians it was less than 9%. The latter devoted themselves more to language studies (29%) and acquiring driving skills (16%). Interest in other fields of study was much more modest, and self-development proved to be of the lowest priority (3%). With respect to financing the courses, the role of the employer was substantial (45%); only 1/3 of Estonians paid their study fee themselves; non-Estonians covered their expenses mainly by themselves (61%). It must be added that Adult Education Act is followed by employers, and as stipulated in law, the employees get paid for the time spent on courses - equally Estonians (80%) and non-Estonians (78%).

The most active learners in 2001 belong to **age group** of 20-29 - the percentage was 22%, and almost half of them regarded their studies as very useful (9 or 10 points on a 10-point scale). There is a tendency that as a person's age increases, the proportion of learners in the given age group decreases. Differences are not significant in numbers. Even in the age group 50-59, the percentage of learners reached to 13%. The lowest proportion of learners was in the youngest (15-19) and the oldest (60+) age group – slightly more than 3%. When comparing the current research with that conducted in 1995, it is obvious that learning activeness has decreased considerably among the youngest adults – proportion of them being 25% in 1994 against 4% in 2001. It is of utmost importance to pinpoint the reason for such a sharp decline. While the people aged 15-19 wish to learn in order to be

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<sup>72</sup> Lifelong Learning Strategy 2005-2008, p. 19.

<sup>73</sup> See more in T. Märja (Ed.) Adult Training in Estonia: Needs and Availability. 2003. Pp. 18-31.

more competitive in the society, then the representatives of other age groups put self-development and the rise of one's qualification in professional terms first. It is a noteworthy fact that unlike others, the oldest age group (60+) attend the courses at their leisure time (64%). Other age groups study during working hours, and get compensation as well. The results show that 100% of the employers (of the respondents in this sample) are in favour of their employees' studies, also in the 60+ group. The preferred fields of studies differ by age groups as well. In case of 15-19 and 20-29, the predominant fields are *entrepreneurship and business* (more than 30%) and *management* (more than 15%), whereas older age groups take courses in the field of *industry, energy and construction* (25 - 30%).

It became obvious that the participation rate of **women** in learning is higher than that of **men**. The proportion of learners was as follows: females 14%, males 12%. The difference is of course too small to draw any conclusions. Women are eager to learn with the aim of self-development (64%), men want to further their professional qualification (45%). Men attend courses in their free time (20%), women can afford to study during working hours (89%). And what is more, women are freer to choose the course at their own discretion (50%) than men (34%). The plans for future learning of women include *service* (19%), *entrepreneurship and business* (19%) and *accounting* (18%). Men plan to learn more in the field of *industry, energy and construction* (34%), whereas only 4% of women schedule such studies.

In this aspect the situation in Estonia is similar to other countries – there is a clear tendency that the higher one's **educational level**, the more he/she values learning, including postgraduate studies. The data showed that people who had participated in training had either secondary-vocational (12%), secondary (14%), college education (19%), or university background (28%). The latter gave the highest points to the usefulness of studies (8 on 10-point scale), and their preferences were language courses (34%) and *business* (32%). People with education lower than basic school constituted only 1%, and those with vocational non-secondary education 5% of the total of learners. Learners with lower educational background were mostly sent to the course by their employer (40%), and in this case, employer chose a course in which an employee had to take part (46%). There is a positive trend that people without basic education wish to continue their studies, in order to obtain a basic and/or secondary education certificate and to learn more languages (26%). Computer and language courses are highly valued by respondents of all educational levels (average of the sample 19%).

People's **income** and studying activity are strongly connected – the highest percentage was in the income group above 3500 EEK per family member per month (27 %), those whose income per family member amounted to 2001-3500 EEK ranked second. Respondents in the lowest income group (up to 1000 EEK per family member) stated that

their first motive for studying was *self-development* (64%), the second important motive, unlike in other groups, was *to find some change* (24%). *The danger of becoming unemployed* forced people to learn in the lowest income group and in the next group (1001-1500) as well - correspondingly 22% and 23%. Both mentioned groups, unlike the groups with higher income, had access to studies through the Employment Board system. With the incomes increasing, the readiness to go to courses grows as well. Learning activity is the highest (28%) in the income group of 3500 EEK per family member. Their priorities are *entrepreneurship and business* (33%), *management* (26%) and *accounting* (23%). People with the lowest income are more bound to acquire practical skills e.g. *industry, construction* (26%) and *agriculture, fishing* (20%). Course providers should keep that in mind!

There are also differences in learning by **social status**. The research reveals that the most active learners are employees (22%). Pensioners who are still working have studied the least (4%). The target group that has lately been much talked about are young women on maternity leave. They are working on regaining their qualification and competence, and 10% of the respondents claimed to have studied during 2001. Young mothers (fathers?) mainly attend computer courses (44%), undergo some occupational retraining (21%) and study languages (28%). It is clear that without the given competences it is difficult to maintain a good position on the labour market.

There is a wide range of learning preferences of employees, which are still mainly connected with their current job. As to training expenses, the employer pays for their employees in full (51%) or partly (7%); the business owners (employers), temporarily unemployed and pensioners cover their expenses by themselves – correspondingly 49%, 57%, 61%. There is a positive trend to pay for the studies of young mothers on leave by their employers (44%).

It is a noteworthy fact that pensioners who are not working, wish to learn more about *entrepreneurship and business* (36%). They seem to have plans for starting their own business instead of staying at home. The preferences of pensioners still working are *humanities and social studies* (51%). University students (71%), working at the same time, as well as entrepreneurs/businessmen (44%) show much interest in *business* studies. The latter also consider the knowledge of *accounting* important (28%). It is a distressing fact that 41% of entrepreneurs/businessmen find it needless to study in the future.



Competitiveness and Educational Needs of Older Employees (CENOE)<sup>74</sup>

Would training help to reduce the sense of insecurity, particularly among the older employees? Their sense of security depends largely on their competitiveness, i.e. age and the highest level of education obtained. It becomes evident from the table below that the accumulation of such competitiveness favours most of all the perception of an opportunity to find a new suitable job, to a lesser degree it also differentiates the sense of security in current job.

Table 3.1 Sources of insecurity by workforce age groups, %

	Specified as one of the three most serious sources of insecurity		
	Young (15-24)	In prime working age (25-44)	Older (above 45)
Level of education might be higher	20	25	14
<b>Causes eliminable by training:</b>			
Poor foreign language skills	16	20	13
Poor computer skills	7	8	12
Poor Estonian language skills	7	8	10
Insufficient professional skills and knowledge	13	6	2
Not enough skill to present oneself in the best light	7	6	3
No certificate to evidence qualification	3	6	5
Employer considers the existing certificate obsolete	1	1	1
Poor communication skills	1	3	1
<b>Other causes:</b>			
Demand for current job is dropping;	6	8	13
Health is not very good	1	5	18
„Wrong“ age	3	0	10
Existence of a child (children)	0	4	0

Source: CENOE, p. 43

We asked a question in the course of the survey as to what did the respondents perceive as the major cause for not feeling themselves completely secure in their current job. We divided the causes into two categories, basing the division on the fact whether the insecurity can be mitigated with training or not. If the respondent considered insufficient professional skills and knowledge, poor computer or communication skills as the main cause, if the respondent found that he or she lacks self-confidence and is unable to present himself or the

<sup>74</sup> Read more: Competitiveness and Educational Needs of Older Employees (CENOE). AEAE Andras, Tallinn 2005

result of his work in the best light, or if the respondent thought that his/her foreign language and/or Estonian language skills were poor, we found that training could facilitate the accumulation of the sense of security. The results revealed that training as a source of security plays lesser role with older employees than it does with younger ones. Only 28% of the respondents aged 45 and above said training might decrease their insecurity; however, there were more such people among younger respondents (42% of those aged 15-24, 37% of those aged 25-44). Older people did not consider their level of education a more serious risk factor than their younger counterparts (see table 3.1).

Table 3.2 helps to find an answer to the question whether these employees whose insecurity can be relieved by training, actually plan to participate in it. For this purpose those respondents who planned to participate in some job-related training within the next 12 were segregated. It can be noticed in case of employees in their prime working age and the older ones that those respondents who associate their job-related insecurity with poor training, have greater interest in training (see table 3.3).

Table 3.2 Insecurity as a factor facilitating interest in training, %

	Prime working age /aged 25-44			Older		
	Plan to take part in one training at least	Are interested in one training at least	Have no intention to participate and are not interested	Plan to take part in one training at least	Are interested in one training at least	Have no intention to participate and are not interested
Causes of job-related insecurity alleviated by training	68	30	2	61	31	8
Other causes of insecurity	56	38	6	39	36	25
Feels secure enough	53	35	2	47	31	21

Source: CENOE, p. 44

Is financial support to participation in professional training an effective means for the involvement of older employees? A number of studies have revealed that people tend to excuse their non-participation in training with lack of financial means. Even a brief look at the trainings offered can tell that participation is a substantial investment indeed. We wanted to explore which trainings people would prefer, if they were able to receive financial support for participation. It appeared that only 3% of the young respondents and 5% of the respondents in their prime working age and only slightly more (14%) respondents aged 45 and above

would not participate in trainings even upon the availability of financial support. This means that a clear demand is existing for this kind of support. Older respondents would use this opportunity for the acquisition-refinement of computer skills.

Table 3.3 Best-preferred trainings upon availability of financial support, %

	Age-group		
	Young (15-24)	Prime working age (25-44)	Older (above 45)
Computer skills	30	24	25
Professional self-improvement	22	35	18
Foreign language skills	46	40	17
Acquisition of new speciality/profession (basing on the existing one)	21	30	15
Acquisition of a totally new speciality	22	16	10
Legal knowledge	11	15	10
Estonian language skill	15	15	8
Enhancement of self-confidence	12	15	8
Communication skills	18	10	6
Entrepreneurship	19	18	5
Accounting skills	4	5	4
Driving	24	9	4

Source: CENOE, p. 48

The age-specific peculiarities of this hypothetical choice are best manifested in the attitude towards learning foreign languages and the improvement of professional knowledge and skills. These two were preferred by employees in their prime working age, not by the older employees. The two obviously constitute labour-consuming trainings with a strong future potential. Employees in their prime working age feel all these efforts still to be worthwhile, whereas the older employees perceive the efficiency factor as disputable. The top-fives of older employees regarding hypothetical situations and the more realistic perspective look more or less similar.

### Conclusion

The aging of population, bringing about the ageing of labour force, has become an urgent issue in Estonia. Against the background of decreasing employment and workforce, it has become inevitable to foster the stay of older employees in labour market. The employment rate of Estonian workforce aged 55-64 is 50% already. One precondition for further growth in the employment rates of older workforce is the improvement of their labour market

competitiveness and creation of opportunities for the participation of older people in training and retraining. It is possible only if the older persons themselves are prepared to learn. The survey reveals that older employees prefer either the acquisition/updating of basic skills (computer and foreign languages) or the refinement of their specific professional skills. It became evident that the better knowledge and skills level a person has, the more he/she is interested in its refinement and development, not giving it all up.

The researchers share an opinion according to which labour market demand for older employees is not an “objective” phenomenon. It depends on the will, decisions and co-operation of all actors.<sup>75</sup>

### **3.1.4 Impact of practice**

The results of the research studies are influencing the adult education practice in several ways:

- Several researches proved the importance of adult learning as a key for economic development. As the result of it the Ministry of Education and Research has paid much more attention to widening the access to ALE.
- The studies revealed that one of the most important reasons for non-learning is the lack of resources. Taking it as an important barrier to lifelong learning the Government took steps for investing into the adult learning much more resources than earlier.
- Providers of adult training, took into account in new programmes the educational interests and needs of adults, mentioned in interviews when elaborating new curricula and planning new courses.
- Some new adult training centres for IT training have been established, as the need for computer training is one of the biggest needs for adults.
- Adult education umbrella organisations developed the network of employers and social partners with adult educators, as results of research stressed the importance of co-operation.

## **3.2 Innovations and examples of good practice**

### **3.2.1 Policy formulation, financing, teaching/learning methods**

There are several important innovations in adult education and lifelong learning developed in Estonia since 1997. Most of them have been described in previous chapters of the present report and will not be repeated here. For example – elaborating Lifelong Learning Strategy; financing lifelong learning from the European Social Fund from 2004; validating and

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<sup>75</sup> Competitiveness and Educational Needs of Older Employees, pp. 49-51.

approving professional qualification standard of adult educator and attach the qualification to more than one hundred educators; organising adult learners weeks from 1998; etc.

Some more innovations will be presented here:

#### Sharing the responsibility between three ministries in financing ALE

There are several different ways of financing adult education. Until recently in Estonia a common model was missing and the general opinion was that learners must be responsible for their learning themselves. This opinion is changing today. As the result of serious discussions and work by the Ministry of Education and Research a three-tier model was elaborated and approved by the Government of Republic.<sup>76</sup> Distribution of responsibilities will be legitimated and respective amendments added to Adult Education Law and other legislation involved.

#### State order for job-related training for adults

In the academic year 2007/2008, a pilot project was initiated by the Ministry of Education and Research for ordering special courses to adults from vocational schools with the length from 8 to 80 hours. The idea is to continue such kind of order until 2013 and train during the period as a minimum 33 thousand adult workers in 30 vocational schools. The total sum scheduled for the training is 100 million Estonian kroons.

#### Increasing role of higher education institutions in ALE.

Growth in **innovation**, as well as the competitiveness of the institution and the individual is ensured by high quality of study and research activities, and the actual ability to apply the knowledge. In the study process, higher education institutions must link the basic scientific and technological knowledge with application skills, business processes and knowledge about teamwork. For the training of competent specialists, technical professional higher education and engineering training must provide a competitive choice in relation to the other specialties, and become a natural path of continued study for those who have completed vocational education. In order to make the targeting of the studies clearer, and that continuation along the educational path be clearer, both between educational levels and proceeding from **the needs of the adult learner**, the higher educational institutions must describe, via learning outcomes in the study programmes what the learner actually knows, comprehends or can do, after the successful completion of a study programme, or a part of one. With the assistance of wording learning outcomes, and applying **new learning methods**, it could be also expected that the attractiveness of study increases for those who have discontinued their education. The setting up of output-based study programmes, the increased variety of qualifications held by admitted students and the expectations of learners, as well as many other changes in the study process also bring about the need to ensure

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<sup>76</sup> Read more in chapter 2.1.1.

opportunities for intensifying the training of teaching staff and the development of study programmes.<sup>77</sup>

### **3.2.2 Involvement of learners in programme design**

Co-operation with adult learners is of great importance. Developing new curricula and planning new training course the opinion of adult learners, the potential participants, has been taken into account where and when possible. Especially it works in training plans of adult educators, but also in several other cases. There is a certain rule, that the curriculum for adult educators' qualification course has 20% space for dynamic changes that can be made during the course. It means that in a 400 - hour course (160 h classroom activities + 240 h individual work) two modules could be changed in accordance with the proposals of learners (20% from the classroom activities or 32 h).

Adult learners were also involved in elaborating the first and second version of adult educators' qualification standard. Taking into account their proposals, the adult educators' competences were reformulated in the qualification standard.

Starting from 2005 the Adult Learners Forum has taken place. Adult learners have their network, meet several times during a year and organise their own forums. Officials and adult education managers have taken into account the results of such kinds of activities when designing study programmes and/or national and international gatherings.

### **3.2.3 Was it an innovation?**

The above described events and other undertakings are new in Estonia – resulting from long - time experiences in developing adult education. These are surely innovative ones.

## **4 Adult Literacy**

### **4.1 Definition of literacy**

*“The illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn.”*

Alvin Toffler<sup>78</sup>

Illiteracy is not a problem in Estonia for centuries. Already in 1739, the compulsory education was established, prescribing that all children between 7-12 had to attend school or

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<sup>77</sup> Operational Programme for Human Resource Development, p. 95

<sup>78</sup> Quotes: [www.thinkexist.com/quotes/alvin\\_toffler/](http://www.thinkexist.com/quotes/alvin_toffler/)

learn to read and write at home. To achieve the goal, there had to be a school established in each parish and estate or village.<sup>79</sup> As the result of such kind of undertakings, at the beginning of the 19<sup>th</sup> century approximately 80% of the population could read and write. In the period 1995-2005 adult literacy rate (% of those aged 15 and older) was 99.8 in Estonia, what puts us on the second/third place (sharing it with Cuba) after Georgia in the world (see table 4.1). Estonian educational index by the Human Development Report is 0.986 and combined primary, secondary and tertiary gross enrolment ratio 92.4 %.<sup>80</sup>

Table 4.1 Estonia's human development index 2005

HDI value	Life expectancy at birth (years)	Adult literacy rate (% of age 15 and older)	Combined primary, secondary and tertiary gross enrolment ratio (%)	GDP per capita (PPP US\$)
1. Iceland (0.968)	1. Japan (82.3)	1. Georgia (100.0)	1. Australia (113.0)	1. Luxembourg (60,228)
42. Slovakia (0.863)	86. El Salvador (71.3)	2. Cuba (99.8)	19. United States (93.3)	42. Saudi Arabia (15,711)
43. Lithuania (0.862)	87. Paraguay (71.3)	3. Estonia (99.8)	20. United Kingdom (93.0)	43. Oman (15,602)
44. Estonia (0.860)	88. Estonia (71.2)	4. Latvia (99.7)	21. Estonia (92.4)	44. Estonia (15,478)
45. Latvia (0.855)	89. Saint Vincent and the Grenadines (71.1)	5. Slovenia (99.7)	22. Austria (91.9)	45. Trinidad and Tobago (14,603)
46. Uruguay (0.852)	90. Philippines (71.0)	6. Lithuania (99.6)	23. Lithuania (91.4)	46. Lithuania (14,494)
177. Sierra Leone (0.336)	177. Zambia (40.5)	139. Burkina Faso (23.6)	172. Niger (22.7)	174. Malawi (667)

Source: Human Development Reports. Estonia.<sup>81</sup>

*“Efforts need to be made to ensure greater access to and participation in the means of communication for all cultures and social groups so that all may share their special visions, cultural artefacts and ways of life and not merely receive the messages of other cultures.”*

Agenda for the Future, CONFINTEA V

Taking this into account the focus in Estonia in literacy questions goes to the *functional literacy* – mostly on computer knowledge. This is the field Estonia is among the leading

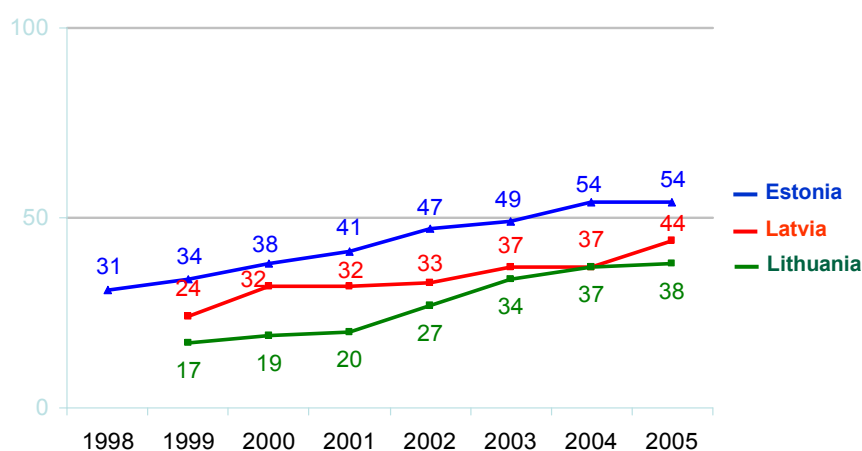
<sup>79</sup> V.-R. Liivar. 2004. *Tähtsamad sündmused ajaloost ja ajalookäik*. www.kuusemets.planeet.ee

<sup>80</sup> Human Development Reports. Estonia.

<sup>81</sup> Read more: [www.hdrstats.undp.org/country\\_fact\\_sheets/](http://www.hdrstats.undp.org/country_fact_sheets/)

countries in the world. We are proud of having implemented *e-Government*, *e-school*, *e-elections*, etc. and using ID card for several other purposes. The functional literacy training got an active start with the project *Tiger's Leap*. We are aware that tomorrow's information society needs to be a learning society, a society which invests in knowledge, a society in which each individual will build up his or her own qualification on a basis of life-long learning. Table 4.2 shows the constantly growing tendency in putting the computer skills into the practice.

Table 4.2 Percentage of aged 15-74, who have used computer during last 6 months (Source: TNS Emor, e-seire)



#### 4.2 New policies adopted and implemented

To put the idea of computer literacy into the practice it was important to train trainers for the purpose. The teachers' in-service training has been a priority area of activity for the Tiger Leap Foundation since the very beginning. The *Learning Tiger*, E-learning development plan in general education 2006-2009, is offering various diversified in-service trainings for the coming years in order to utilize available opportunities. Under this new policy, the Tiger Leap Foundation has started four vast teacher-focused training projects:

- *DigiTiger*
- *Project Kit*
- *AnimaTiger*
- *TechnoTiger*

The above-mentioned courses differ greatly in contents and volume. *DigiTiger* and *Project Kit* are targeted to all teachers irrespective of subjects. The courses concentrate on active



learning methods integrated with information technology. If the 20 - hour Project Kit concentrates mainly on project-based learning, then 40 - hour *DigiTiger* course offers also additional information about e-learning environments, e-portfolio, new media etc. *AnimaTiger* is targeted to the teachers of art, mother language and information technology mainly – producing a puppet film results from a combination of these subjects. *TechnoTiger* is targeted to a small part of teachers of information technology, art and occupational guidance. Schools that have a milling machine connected to the school computer, acquired with the help of procurements organized by Tiger Leap Foundation can participate in this project. In order to evaluate training needs the Tiger Leap Foundation has developed Teachers educational technology competency requirements.<sup>82</sup>

#### 4.3 Good practice examples

- 1) The *Tiger Leap* programme is a national specific programme launched by the Estonian Government with an aim to increase the quality of education in Estonian schools utilizing modern information and communication technologies. The programme is funded from the national budget via Ministry of Education and Research. By today, the Tiger Leap programme 1997–2000 and *Tiger Leap Plus* development plan 2001–2005 have been put into practice. The objective of Tiger Leap programme (1997–2000) was to modernize ICT infrastructure of educational establishments, but the next programme Tiger Leap Plus already highlighted ICT competency assurance for all students and teachers. Both programmes supported innovative e-learning initiatives of schools, universities and other institutions. Focus of the Learning Tiger development plan 2006–2009 is mainly on *E-learning* and various e-learning related content services development. Main objective of this development plan is to increase curriculum quality and effectiveness utilizing ICT and introducing e-learning as a part of daily curriculum.<sup>83</sup>
- 2) In the year 2001, in Estonia ten leading companies established the *Look@World* Foundation with an aim to increase considerably the number of internet users, raising thereby the living standard of Estonians and the competitiveness of our economy in Europe. Within the framework of the *Look@World* project these leading companies have donated funds for the free computer training of 100 000 people and the setting up of e-School, e-Library and opening nearly 500 public internet access points in Estonia. These funds have also helped to pay for the installation of national ID card readers at Public Internet Access points. It is important to stress that the computer and internet

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<sup>82</sup> [www.tiigrihype.ee](http://www.tiigrihype.ee)

<sup>83</sup> Sic.

training was targeted to elderly people. Course fee as well as also the establishment of Internet access points was financed by private companies (largest banks and telecoms), who altogether invested into the project more than 40 million Estonian kroons (2.5 million euros).<sup>84</sup> President of the Republic of Estonia Mr. Arnold Rüütel (patron of the project) said in his opening speech that he was pleased to see that Estonia's private sector was ever more willing to take part in meeting social challenges which concern the state in its entirety.<sup>85</sup>

At the closing ceremony of the training project *Look@World*, Mr. Rüütel said: "One commendable far-reaching undertaking is coming to end since the objectives set at its start have been successfully met. Two years ago, the Look @World Foundation launched this large project designed to provide one hundred thousand people free training in the use of computers and Internet. 315 teachers working at 260 locations all over Estonia were involved in this work. The project took 40 million kroons donated by project partners. While measuring the results of the project, one should take notice of a very high assessment given by the trainees themselves: 4,8 points on a five-point scale. ... *Look@World* has enabled many good people to learn skills which help them to cope better with life's challenges and improve their competitiveness in the labour market. *Look@World* has helped to reduce regional inequalities and encouraged also small villages to strive for progress. As the patron of this training project, I would like to thank from all my heart all those who have contributed to the success of this large project encompassing the whole of Estonia. I thank the authors and implementers of the project as well as all those who acquired new knowledge under the guidance of the best expert teachers. ...I hope that the trainees of today soon become trainers of others, and wish you for that purpose perseverance, good will and energy. It is just an Estonian tradition that skills and knowledge have always been passed on from generation to generation."<sup>86</sup>

#### 4.4 Focus on gender

There is no special attention paid to gender questions in educational policies in Estonia, as there are no big problems in the field. Specially, when talking about the access to education for women. For several decades the number of girls at the school level and students at universities outnumber the one of boys/men. Big difference is in the numbers of adult learners – most participants are women. So, when the question arises about gender equality in ALE, the focus in Estonia must be targeted to men. The main problem is – how to

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<sup>84</sup> Read more: [www.sk.ee](http://www.sk.ee)

<sup>85</sup> Äripäev Online. See: [www.aripaev.ee/2147/free/summary/html](http://www.aripaev.ee/2147/free/summary/html)

<sup>86</sup> The President of the Republic of Estonia 2001-2006. Speeches.

motivate men to continue learning after initial education. The target groups who are interested in doing it, are managers and top-level specialist – mostly men.

#### **4.5 Building literate environments**

The idea of *Tiger's Leap* foundation dates back to 1996 when the former Estonian Ambassador in the United States Toomas Hendrik Ilves (now the President of the Republic of Estonia) and Minister of Education and Research Jaak Aaviksoo (now the Minister of Defence) exchanged views regarding new information and communication technology that changes not only the way of life but the whole educational paradigm. Funds for the foundation of *Tiger's Leap* were first allocated in the national budget of 1997. An important primary effect of the project was the delivery of Internet access to all Estonian schools, which effectively ended UUCP usage in Estonia, combined with installing computer labs in most schools, and replacing those that already existed with IBM PC based parks. During the past 10 years the ICT opportunities in the Estonian schools of general education have achieved a very good level – continuously renewed computer systems and constantly broadening variety of produced courseware creates a good basis to diversify the learning process.

### **5. Expectations of CONFINTEA VI and future perspectives for ALE**

#### **5.1 Expected outcomes of CONFINTEA VI**

On April 10<sup>th</sup>, 2000 the prime minister of the Republic of Estonia Mr. Mart Laar had in Paris a meeting with the Secretary General Mr. Koitchiro Matsuura. He supported Mr. Matsuura in his activities in education and science and proposed him the Estonian support in ICT, especially in mediating *Tiger's Leap* experiences as a good practice example. We'll expect from the CONFINTEA VI an outcome stressing the importance of the functional literacy, especially computer and Internet competences as important instruments in coping with today's life.

During the UNESCO International Conference "Education for All, Learning to Live Together: Subjects and Strategies" in Geneva in September 2001, the Minister of Education and Research of Estonia Mr. Tõnis Lukas had a meeting with the Secretary General of UNESCO, Mr. Koichiro Matsuura. Besides introducing to him the Estonian educational system, minister T. Lukas raised a question about widening the UNESCO's role in supporting lifelong learning along the lines it was decided in CONFINTEA V, but what in the meantime was narrowed manly to the adults' literacy problems. As illiteracy is not a problem in Estonia, we are especially interested in UNESCO's role in that field. Mr. Matsuura answered positively to the proposal. We are expecting that the question will be raised on the CONFINTEA VI and will find an important place in discussions and final declaration of the Conference.

## 5.2 The Call for Action Recommendations

As one of the participating countries in the Sofia Conference on Adult Education in November 2002 “Lifelong Learning in Europe: Moving towards EFA Goals and the CONFINTEA V Agenda”, we agree with the Declaration – **Call to Action**, signed by all, more than 200 delegates of the conference from Europe, North America and Central Asia.

The Sofia Conference “Call to Action” was being issued to express support for the excellent work done to date on EFA, CONFINTEA V and Lifelong Learning and to stress the need for continued progress on the implementation of EFA, CONFINTEA V and Lifelong Learning policies. While applauding the efforts to reach out to the school-aged population within EFA and Lifelong Learning policies and practice we want to highlight the inadequate attention being given to the learning needs of adults in many countries. We believe that access to literacy and learning are human rights that must be extended to all, regardless of age. We think that there is a danger that EFA could come to mean education for all *except for adults*.

The Sofia Conference Call to Action is addressed to “whom it may concern”, namely those with the mandate and the power to take action on the specific recommendations made below. These key players in education policy and/or provision include: UNESCO, European Commission, European Parliament, Nordic Council of Ministers, Council of Europe, OECD, local, regional and national parliaments and governments, social partners and NGOs.<sup>87</sup>

In Estonia the following recommendations are the most important among the whole set:

- We encourage equal emphasis on the delivery of learning opportunities in formal, non-formal and informal settings. Partnerships between statutory, non-governmental, and social partners must be fostered to address these different adult learning needs worldwide.
- Governments at all levels need to ensure that Adult Education remains an explicit and integrated element in their Lifelong Learning policies and practices. The creation of the local, regional and national frameworks and structures that are required for the development, co-ordination, quality management, evaluation and funding of Adult Education needs to be given high priority by the level(s) of government responsible for education under each nation’s constitutional arrangements.
- In addition to reading, writing, numeric and ICT skills, we recommend that basic education provision should include the skills and knowledge necessary to advance each person’s ability to participate fully in the social, cultural, political and economic life of their

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<sup>87</sup> Recommendations made by the conference could be read in - Lifelong Learning in Europe: Moving towards EFA Goals and the CONFINTEA V Agenda. Sofia Conference on Adult Education. Call to Action. 9<sup>th</sup> November 2002

communities. As well, additional resources need to be allocated to support adult learning for active citizenship and self-fulfillment.

- Comprehensive local, regional and national statistical data collection systems for Adult Education are required. Data are needed to establish benchmarks, to undertake needs analyses, to plan, to monitor, to report on and to evaluate performance, and to undertake international comparative studies. Employment statistics should contain a section on employment in Adult Education in the state-financed, commercial, non-governmental and self-employed sectors.
- We believe that regular reports on progress to reach policy targets are a necessity. This applies equally to the EFA Framework and to the CONFINTEA V Agenda. *Therefore we recommend that annual national reports on progress should be made to stakeholders and to UNESCO.*
- Benchmarks and indicators, as well as adequate monitoring and reporting procedures must be developed to ensure that annual reports are comprehensive and complete. UIE should play a key role in the development of these tools.
- Quantitative and qualitative instruments to monitor the application of gender sensitive policies in the provision of Adult Education must be further developed and used.
- Comprehensive systems for the certification and recognition of formal, non-formal and informal adult learning must be developed. A key ingredient must be a system for accrediting prior learning.

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