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# Lifelong Learning Policies in Estonia

## LLL2010 SP1 Country Report

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 Lifelong Learning Policies in ESTONIA  
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## 1. INTRODUCTION: HISTORICAL BACKGROUND

### Lifelong learning and adult education in the education system

Transition to democracy and market economy in Estonia has brought large scale and deep economical, social and political changes.

In 1991 Estonia gained its re-independence and was accepted to European Union in 2004. Since re-independence Estonian education has been constantly reformed. General tendencies and changes of international educational policy have been taken into a count of the development of educational system in Estonia and since 2004 educational policy has been greatly influenced by allegation to European Union.

Changes in Estonian educational system can be seen in the context of processes taking place in Estonia, Europe and the rest of the world. Changes in educational system are far-reaching and its impacts are seen in the background of long-term processes. Estonian educational situation and policy within the last ten years has been impacted by formation of democratic civil society; social, economical and political situation; allegation to European Union and NATO; wish to retain and strengthen national identity. With in last few years Estonian educational policy have been influenced by European Union social, economical and political directions, also by the need to consider EU directions, policies and tendencies of European educational area.

During the last fifteen years in Estonia (1990-2005) major changes are taking place in all levels of education such as: structures and content of curricula; system of educational institutions; structure of network and ownership as well as educational management; educational policy, educational organization and principles of financing.

In Estonian educational system all levels covering formal education curricula and educational institution system have been formed; also continuing education and in-service training is developing; Estonian citizens' average level of education is high; and there are legislations regulating education. Have to be told that changes in education have not mostly originated from development perspectives of whole educational system, neither from publicly accepted vision of educational system. Changes itself have not been systematic, considerable educational research is non-existent which leads to the weakness of development activities of lifelong learning and adult education (Riiklike hariduspoliitikate ülevaade: 2001).

Adult education and lifelong learning is one of the priorities in the development of education in Estonia. In 1993 *Adult Education Act* was accepted by Estonian Parliament, the act changed the role of adult education in a society significantly (Märja 2000: 30). In 2000 government of Estonia agreed on *Adult Education National Priorities until year 2003*, in that document the importance was systemization of in-service training system; widening perspectives for learning opportunities of risk groups; offering training for starting small and medium sized enterprises; social adaptation training for teachers, counsellors,

trainers; trainings for adult educator educators; participatory democracy and civics (Helemäe, Vöörmann, Saar, Kazjula 2003).

Situation of adult education can be characterized by contradiction: adult education in Estonia does not meet the educational or training needs of population. The flaws are seen in the missing of unifying and whole conception and system of adult education and in inefficient cooperation of adult education agents/stakeholders (Märja 2000). Creators of learning opportunities are institutionally different in Estonia. Widening of training market creates constantly competition for target groups, subject fields of training and finances. Therefore it is important to emphasise on the need of institutional supportive relationships which concentrate on common understandings of activities goals; constant communication; allowing to make better choices and decision of creation of learning opportunities (Schuller & Bamford 2000). Contradictions in lifelong learning significant goals and current educational situation and integration to EU educational system created the need for compiling Estonian Lifelong Learning Strategy for the years 2005-2008 (Eesti Elukestva Õppe Strateegia 2005-2008, 2005). Main idea of the development plan is the conception of lifelong learning and every person's right for continues learning through out life.

Adult education national priorities stated in the development plan for years 2005-2008 are:

- Creating opportunities for adults for access to lifelong learning and creating possibilities to return to educational system;
- Development of counselling system for adults;
- Accreditation of prior experiential learning;
- Development of adult education financing system including tax system that motivated enterprises to invest on their workforce
- Quality assurance of adult training including in-service training (Täiskasvanuhariduse Arengukava 2005 - 2008. Projekt. 2005).

The aim of Estonian Lifelong Learning Strategy for the years 2005-2008 is to increase opportunities and motivation of adults for participation in formal, non-formal and informal learning activities in conformity with citizenship, society and labour market needs by raising the participation percentage by year 2008 to 10%.

Development plan is directed to the following key issues:

- To raise competitiveness of Estonian state and its citizens;
- To accomplish sustainable economical growth
- To strengthen Estonian citizens social integration and formation of citizenship;
- To raise citizens life quality (Eesti Elukestva Õppe Strateegia 2005-2008, 2005).

## Transition processes in education system

The period of time from 1990 until 2005 can be characterised as expansion of education<sup>1</sup>. Opportunities for gaining education had expanded; also arise of citizens' educational level and increase of learning opportunities can be seen in the background of higher education openness, increase and diversity of opportunities. With in the past twenty years Estonian education system has predisposed gender and national economical segregation and reproduced education system segmentation<sup>2</sup>. Transition to market economy, restructuring economy in 1990s increased the level of unemployment and its risks in Estonia. The risk of unemployment had impacts from education system language and labour market ethnical segregation<sup>3</sup>. In the end of 90s there was a remarkable increase of learning opportunities in higher education due to state universities state budget exterior funding study places and formation of private universities.

In 90s the meaning of education also changed in society. Education became a tool that enabled to realise social ambitions and created premises for getting into political or economical elite. With in rapid economical reforms impact of education to employment can be seen, therefore education as a resource has been emphasised. Higher level of education means in Estonia also higher payroll and better opportunities at labour market.

Generally it can be said that changes in Estonian society in the past decade has brought many changes to educational system and especially in the level of social stratification. Differentiation of social and educational capital is crowing. Estonian Future Studies Institute has done prognoses and also Estonian Human Development Reports state that stratification in Estonian society is persisting<sup>4</sup>.

Education in Estonia in the end of 90s and beginning of 21st century has not had integrative and equalizing role rather than that education has had differentiative and selective role. Educational system has become instrument of social classification<sup>5</sup>. Usage of Gini quotient for analysing educational inequality shows that educational inequality is higher amongst people living in the countryside, Estonians and women. In year 2000 the highest educational inequality was amongst 15-19 year olds and 60+ year old people<sup>6</sup>. That kind of situation can named as social and moral paradox of education<sup>7</sup>.

Historically, vocational education in Estonia does not develop premises that would ease for youth the transition from educational system to labour market or decrease unemployment<sup>8</sup>. The quality and reputation of vocational education in Estonia has been low, and that creates disproportion between different studying directions. Therefore improvement of quality and reputation of vocational education and increase in studying opportunities have become one of the aims of Estonian educational policy. Adult education is not very much centralised and adult training development tendencies show adult education regionality, training opportunities have been created only in bigger cities, regional centres and big

<sup>1</sup> Helemäe, Saar, Võormann, 2000: 263

<sup>2</sup> Helemäe, Saar, Võormann, 2000: 268

<sup>3</sup> Helemäe, Saar, Võormann, 2000: 270

<sup>4</sup> Loogma, Pettai, Terk 1999, Eesti Inimarengu Aruanne 2002, 2001

<sup>5</sup> Helemäe, Saar, Võormann 2000: 276

<sup>6</sup> Paulus 2004

<sup>7</sup> Jarvis 2000

<sup>8</sup> Pavelson 1999

organisations where there is enough of intellectual and material resources. Access opportunities for getting education has decreased primarily for people who does not have access to education or does not have opportunities or resources such as: good education; good position and status at labour market; health, money; time; family support; inner motivation and will for studying<sup>9</sup>.

In continuing education active are those who have better education and position in labour market<sup>10</sup>. From a research conducted in 2001 *Analyses of Lifelong Learning Needs* can be seen that nevertheless of the increase of educational and learning opportunities participation is continuing and in-service training is decreasing (1994 – 15% (150000); 2001 – 13 % (130000) 15- 74 years old (Elukestva ...2001).

### Access to education: issues on the agenda

Last few years have brought up a problem of students who discontinue studies in primary school before they receive a certificate or turn 17. Compulsory school attendance generally starts at the age of 7 and lasts until basic school is completed (form 9) or until the student has turned 17 years old, even if not graduated 9<sup>th</sup> form. The basic level covers categories 1 and 2 of the ISCED classification. In every year nearly 1000 young people discontinue their studies. According to the data of population census in year 2000 there were nearly 12000 17-49 year old persons without primary education. As the researches show, people with no primary education have very narrow perspective in labour market and they have maintenance problems. 1999 poverty research showed that low educational level is in connection with higher individual poverty risk. 31,3% of Estonian working-age population (15-59 year olds) who had only elementary education lived in poverty.

Creating learning opportunities in Estonia also means that there is a need to consider demographic situation that can be characterized by two major challenges: decrease of birth rate and population ageing; and ethnic minorities.

According to the data of population census in year 2000 there were estimated to be 1 437 197 inhabitants in Estonia all together. Between 1991-2000 population has decreased 8,4% (from 1 570 451 to 1 439 197). Population rate dropped dramatically in 1992-1993 after the re-independence of Estonia. For educational system the most significant is the fact that birth rate is dropping which has within the last fifteen years dropped continuously. In the population over 60 years old proportion has increased and in year 2003 was nearly 21,8% and according to the prognoses by year 2020 it will form 25% of the whole population (*Riikliku hariduspoliitika ülevaade 2001: 32*).

Aging of the population creates the need for investing to unemployment and job-seeker training but as well to adults continuing or re-training. Emphasised should be risk groups: people living in the country side; people with lower than the average income; people who are at risk to drop out from labour market (*Täiskasvanuhariduse Arengukava 2005 – 2008, 2005*).

<sup>9</sup> See Helemäe, Saar, Võormann 2000, Jõgi 2004, Märja 2000, Märja & Jõgi 2001

<sup>10</sup> Võormann, Saar, Helemäe 2000, Inimarengu Aruanne 2002

In Estonia, the extent of the population of other than Estonian ethnic origin is about 31 per cent;<sup>11</sup> most belonging to the Russian-speaking minority. Knowledge of the Estonian language and the possession of Estonian citizenship differentiate labour market chances of the two language groups.<sup>12</sup> There is a concern about social exclusion among members of the Russian-speaking population,<sup>13</sup> which is concentrated in the Eastern Estonian regions of Ida-Virumaa. Saar and Kazjulja (forthcoming) have shown clear cumulative advantage and disadvantage patterns in life courses of non-Estonians in the winner/losers divide from the first half of the 1990s consolidated during next period. It was very hard to overcome exclusion of the first phase. The channels by which risks were shifted depended upon pre-existing inequalities of resources. Increasing economic risks in the process of post-socialist transformation were shifted towards the more disadvantaged groups within the labour force; from the market transition benefited those who were already better rewarded. Non-Estonians who were already in middle and lower positions in the 1980s found themselves again in such positions. In this sense the situation of non-Estonians in Estonia was quite close to life course patterns in East Germany where later corrections were also rare.<sup>14</sup> There are also similar features in recruitment process to elite and upper service class positions. After reunification a West German "import" to elite and upper service class positions in East Germany has taken place<sup>15</sup>. In Estonia non-Estonians in upper class positions, were often replaced by Estonians. This process was supported by liberal ideology, which in Estonia has been fused with nationalism<sup>16</sup>.

Changes in the 1990s affected two national communities in Estonia differently. Non-Estonians had twofold downgrading risks: as an ethnic group moving from a privileged nation to becoming a minority within a nationalizing Estonia and as most of them worked in industry also as representatives of previously privileged social group (industrial workers). As knowledge of the official language provides better access to local higher education institutions and higher-status jobs, and is also a crucial prerequisite for foreigners' obtaining Estonian citizenship; therefore the state organises and co-finances special language courses for ethnic minorities.

National program *Integration in Estonian Society 2000-2007*, was consolidated by Estonian Government (14<sup>th</sup> of March, 2000) defines four sub-programs which focus on foreign language speaking children (sub-program 1; 2) and adults (sub-program 3) language training and Estonian citizens society competence (sub-program 4). Integration program states that non-Estonians political integration to Estonian life is expressed by juridical means of having citizenship. Results of monitoring research of integration (2000, 2002) show that in Estonians conceptions integration focuses on assimilation of language-communication skills which means that non-Estonians are seen part of civil society of the state only by ethnic-cultural prism. Researches show that minorities see citizenship more widely in connection with social welfare but in the same time distant from language assimilation perspective<sup>17</sup>.

<sup>11</sup> Data on 2005 are from the Estonian Statistical Office database: [www.stat.ee](http://www.stat.ee)

<sup>12</sup> See, e.g., Hallik et al. 2001, Pettai and Hallik 2002, Evans and Lipsmeyer 2002, Hallik 2002, Kazjulja and Saar (forthcoming), Kazjulja and Roosalu 2007.

<sup>13</sup> See, e.g., Aasland and Flotten 2001, Kennedy 2002, Downes 2003, Gil-Robes 2004.

<sup>14</sup> Diewald et al., 2006

<sup>15</sup> Solga, 2006

<sup>16</sup> see Kennedy, 2002

<sup>17</sup> Hallik 2002

Since 1999 mainly foreign aid financed language learning projects which supported Estonian language learning for “significant” social groups. In years 1999-2004 Estonian language training has been supported for unemployed, police, rescue and prison officials, medicine personnel and teachers <sup>18</sup>

Adult learning opportunities analyse 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 deepening, in the same time places of work are decreasing and changes in product and service markets also in organisations are taking place, work-force as well as Estonian population is aging and decreasing.

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 long term this kind of situation threatens cohesion of Estonian society. Based on the researches conducted in Estonia it can be stated that cooperation of institutions that provide learning opportunities for adults do not rely on stable relations, therefore there is no effective information sharing, no common understanding on goals, priorities and possible common activities<sup>19</sup> .

Adult education is a powerful force for accomplishing social coherence especially when the context is related to local and regional level, surrounding life. Social inclusion assumes creation of social coherence through education gaining opportunities and training offers also through educational institutions cooperation and functioning educational policy.

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<sup>18</sup> [www.meis.ee](http://www.meis.ee)

<sup>19</sup> Märja 2000, Märja & Jõgi 2001, Pae 2005

## 2. INFLUENCE OF CONCEPTUALISATIONS & DRIVERS ON LLL POLICY & PRACTICE

### Theoretical Perspectives

Professor emeritus Talvi Märja who is so to say grand old lady of LLL in Estonian was interviewed (06.04.2006) in order to clarify main influences of the literature to academic/scientific analysis of post-compulsory education and LLL in Estonia.

Prof. emer. Talvi Märja pointed out as the main issue that theoretical background of LLL concept in Estonia is rather narrow. Theoretical background is eclectic and unifying conception of LLL has not been formed yet. Several researches have been conducted in Estonia but that has not led to the formation of LLL theory as the researches aim for the overview of whom and on what extent are learning but not aiming to clarify the conception of LLL. In order to form conceptually firm LLL theory it is needed to step further from project-based development of LLL concepts.

There are few researches conducted and published on the influence of conceptualizations and drivers on LLL policy and practice. In order to clarify the importance of economic, personal development, and active citizenship/social inclusion perspectives on LLL policy and practice in Estonia individual interviews were conducted based on following questions:

- Which are the main conceptions of adult education and LLL in Estonia?
- What has influenced non-compulsory/adult education and LLL theoretical perspectives?
- What is the importance of economic, personal development, and active citizenship/social inclusion perspectives on LLL policy and practice in Estonia?

Following experts were interviewed during the time of 04.04-06.04.2006: **Viive-Riina Ruus** (Tallinn University, Professor emeritus), **Krista Loogma** (Institute of Educational Research, Head of the Institute), **Talvi Märja** (Tallinn University, Professor emeritus), **Tiina Jääger** (Estonian Non-Formal Adult Education Association, member of board) and **Terje Haidak** (Ministry of Education and Research, Head of Adult Education Division).

Analysis is based on interviews with experts and on Lifelong Learning Strategy 2005-2008. Strategy includes descriptions of lifelong learning goals, measures, and activities for Estonia. Strategy enacts plans for realisation of lifelong learning goals.

## Economic perspective

LLL concept became to focus of policy more after Estonia had joined EU. In opinion of T. Märja before the widening of Europe the voices of experts were not heard on the issue of LLL and it was not understood that LLL conception is economically profitable for the state.

T. Märja stated: “As long as there has been the conception of lifelong learning, it has been always been fought for...It was difficult to get support from the politicians, that was surprising as knowing the actual situation in the labour market where there was lack of workmen and it was thought that labour force has to be imported even though when people could actually be retrained”.

T. Haidak and K.Loogma point out that in Estonia economical competition is the key issue that is forming the values of LLL. Greatest expectation in society is economical development and growth therefore the relation of personal success and education is not widely seen.

T. Haidak stated: *“Economical competition is most important in Estonia and this is where the values of adult education are developing. The greatest expectations in society at the current moment are economical development, people value more success and their own life...’ Hopefully soon people will realize that successfulness goes hand in hand with education and education becomes equal to economical aspect of learning.”*

LLL as a key figure for improving state economy was recognized after Lisbon strategy in year 2000. Several strategic documents have stated the importance of economical development in relation to LLL 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, as one of the aims 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-economical development.

## Personal development perspective

V.-R. Ruus believes that Estonians have very good cultural premises for valuing LLL as in personal level education is highly valued. *“I think that religion of education is a bit stronger in Estonia than Christian religion is. So I believe that culturally we have good presumptions for LLL conception.”* stated V-R. Ruus.

Even though experts (V-R. Ruus , T.Jääger, T. Haidak) state that learning is not widely seen as a key issue for personal development rather than that learning is expected to be profitable in everyday life (work-life). T. Jääger pointed out that *“In Estonia understanding of education is related to liberal point of view. Education has got a very pragmatic meaning – it has to be very rational and effective, in other words utilitarian, something that can be used here and right now. In this point of view personal development is questionable, because it is time consuming and expensive”*.

The main goal of *Estonian Lifelong Learning Strategy 2005-2008* (2005) is to increase Estonian citizens' opportunities and motivation of participation in formal, non-formal and informal learning with the aim of improving personal skills and knowledge in correspondence to personal development, citizenship, society and needs of labour market. Indicator for achievement of the main goal is related to increase in the number of participants in training up to 10% by year 2008 amongst 15-64 year old citizens (Elukestva Õppe Strateegia 2005 – 2008, 2005).

### **Active citizenship/social inclusion perspectives**

Experts allege that LLL has great importance in social inclusion. V.-R. Ruus sees LLL as a bridge between educational system and also with connection to active citizenship. LLL is the key figure for example when someone wants to continue educational path but has dropped out earlier. *“Organisational “bridges” has to be built in the way that these create social inclusion not social exclusion. Enabling citizens to learn enables also to participate in active citizenship,”* states V.R. Ruus.

One of the aims of *Estonian Lifelong Learning Strategy 2005-2008* (2005) is to strengthen Estonian citizens' social inclusion and development of active citizenship and by those means increase life quality. *The Estonian Civil Society Development Concept* (2002) is a document that describes the different roles of the public sector and the non-profit sector that supplement each other, and the co-operation principles in developing and implementing public policies and building up the civic society.

According to K. Loogma, one of the obstacles is that politicians have traditionally under estimate the importance of active citizenship and therefore also the concept of active citizenship. There is actually no stable support on the behalf of state.

### 3. UNDERSTANDING AND OPERATIONALISATION OF LLL

#### How is LLL understood in Estonia

Lifelong learning is understood by all learning activities within lifetime, aiming to improve knowledge, skills and competencies in accordance to society (social coherence), citizenry, self and labour market needs in formal, non-formal and informal learning situation. Lifelong learning definition includes all learning activities irrespective of the goal, lengths, financing source or formalisation level of the learning activity (Elukestva õppe strateegia 2005-2008, 2005). Nowadays ability to learn and readiness for lifelong learning is often recognised by the policymakers as the bases for elementary and primary education system (Haridusstrateegia Öpi-Eesti, 2001<sup>20</sup>). Thus lifelong learning has its roots in formal education system and continues all life by connecting different learning opportunities.

According to Estonian Lifelong Learning Strategy 2005 – 2008 (2005) the roots of LLL is in strong Estonian family. Family is the first educator of a child. A child receives the first knowledge and skills on how to cope with life. Main key-word is pre-school until the age of 7.

The idea of pre-school teaching is not very widely spread in Estonian LLL discourses. But some of the statements about the importance of pre-school have been mentioned in some of the recent document.

To establish the early acknowledge of the problems impeding children to study, to create a smooth transformation from kindergarten life to school life and grant equal opportunities for everyone to participate in elementary school – is important to provide at least one year pre-school for all the children (Haridus- ja Teadusministeeriumi valitsemisala arengukava “Tark ja Tegus rahvas” 2007 – 2010 (2006). To achieve the aim a measure 1.1 is taken into action. Measure 1.1 states following – the opportunities to take part in pre-schooling will be broadened in kindergarten and schools according to the individual needs of children. To accomplish that, all the children younger than 7 will be included into one year pre-schooling in the year 2007. As a result of that children have social, physical and psychological readiness to go to school.

Prof. Emer. Talvi Märja emphasizes that three important facets of lifelong learning are:

- Knowledge and skills have become main tools in 21<sup>st</sup> century helping people to manage their life;
- Lifelong learning has a key role in promotion of citizens employment and adaptability, also to build a uniting, democratic society;
- With ageing the proportion of learning is not becoming less important. Average life-span is increasing and active work-life has become longer in years that challenge all members of society.

(Märja, Lõhmus, Jõgi, 2003)

20 This document, although prepared in the cooperation by policymakers and specialists in the field from the non-governmental sector, has remained not approved by Government or Parliament

Furthermore lifelong learning is seen as a key function for relief of poverty, inequality and social stratification but also support for democracy, creativity and economical development (Eesmaa 2003).

The discourses of brain drain, immigration, ageing population and work force are not widely spread in Estonia LLL policy, only document approved at the end of 2004 to the beginning of 2006 mention word or two about free movement right and brain drain. There isn't even official statistic of Estonians leaving the country. According to Aher and Heinaru (2000) are those who leave Estonia either very highly educated or very poorly educated. The problem of brain drain is also mentioned in the strategy *Säästev Eesti 21* (2005): "one of the main questions of the concept of sustainable development are human recourses and the optimal use of them." The strategy also states that brain drain is not a issue in Estonia, mostly thanks to official policy that has found extra recourses to attracted specialist to come back and stay in Estonia. The last statement might be too optimistic because there are no official data about how many specialists have left the country and how many of are planning to leave.

At the same time state is taking steps to stop or reduce brain drain, education institutes on different level are taking into consideration the joint EU labour market and more attention is being paid to language teaching and the quality of education. "Against the background of the increasing internationalisation, as well as Estonia's later integration into the European Single Market and the free movement of labour including people with vocational qualifications, Estonia considers it important for its (future) skilled workers to learn foreign languages" (Modernisation of Vocational Education and Training in Estonia, 2001:60). One of the aims of *Estonian Strategy of Higher Education for the years 2006 – 2015* (2005) is to raise the quality of higher education and offer higher education that fits into the frames of global education market.

The problem of ageing population is recognized widely. "Because of ageing population it's important to invest both into the training of unemployed people and into people currently active in labour market." (Estonian Lifelong Learning Strategy 2005 – 2008).

None of the documents concerning LLL policy mention immigration or the education needs of immigrants. NGO Estonian Refugee Council is helping immigrants to adjust in Estonian society and addresses to all the immigrants individually.

### **Different organisations and institutions offer training courses for adults**

*Acquisitions of higher education* – Universities in public law and state institutions of professional higher education offer possibilities to study in the form of evening courses and distance learning; also continuing education outside of formal education may take place in these institutions. Studying part time is usually payable for people, financed are only priority areas of the state (e.g. teacher with no higher education). In 2004/2005 academic year there were 17,7% of adult population acquiring higher education part time (Elukestva õppe strateegia 2005-2008, 2005).

*General education* – Obtaining basic education and general upper-secondary education in form of evening courses, distance learning and as an extern student are free for students.

In 2004/2005 academic year there were 33 educational institutions in where general education was obtained by 0,8% of the adult population and 14,4% were obtaining upper-secondary education (Elukestva õppe strateegia 2005-2008, 2005).

*In-service training* – is offered by training centres but as well by applied higher education institutions, universities and vocational schools. More and more in-service training is offered by professional unions. In vocational education system there are studying 8,4% of adult population ( Elukestva õppe strateegia 2005-2008, 2005).

*Non-formal adult education* – significant role of adult education is formed by non-formal adult education that is organised by public universities and training centres but also by different societies, groups where main form for learning is learning circles. Participation in non-formal learning is yearly 3-3,5% of Estonian adult population (EVHL 2006).

In Estonia the National Qualification Framework (NQF) has been established quite recently, as only in 2001 the field was regulated by law. In the past few years Tartu University in cooperation with Ministry of Research and Education have implemented a project Accreditation of Prior Experiential Learning (APEL). The aim of the project is to create a model for recognition and accreditation of prior experiential learning for educational institutions and also for employers. In 2002 there was a change made in Professions Act that in acquisition of profession it is allowed to recognise prior learning and working experience (Kutseseadus 2001) that is applied by The Estonian Qualification Authority for applying of qualification standards. There are single cases where university or employer recognises prior experiential learning but there is no system. One of the aims of *Estonian Lifelong Learning Strategy 2005-2008* (2005) is accreditation of prior experiential learning in all levels of education. A system for APEL must be developed and applied in tertiary education (Elukestva õppe strateegia 2005-2008, 2005).

#### 4. SIGNIFICANCE OF KEY CONCEPTS IN LLL POLICY

There are about 60 strategy documents in Estonia that have been compiled by different expert groups (*Säästev Eesti 21*, 2005). Overview is based on following strategic documents: *Estonian Lifelong Learning Strategy 2005-2008*; *Knowledge-based Estonia. Research, Development and Innovation Strategy 2001-2006*; *Educational Strategy Study-Estonia (which has, however, remained not approved by the government or parliament)* and EU document *Making a European Area of Lifelong Learning a Reality* (2001), translated and published in 2001. Based on named documents following concepts in LLL policy and practice will be analysed:

- Learning citizens
- Learning organisations
- Learning cities/regions
- Learning society
- Knowledge society (Appendix 1 – *in Estonian*)

Concepts are analysed in three levels: micro-, mezzo- and macro level.

##### Micro level

Concept of learning citizen is in all documents presented through various other concepts such as: learning person (*Study-Estonia*, 2001), adult learner (*Estonian Lifelong Learning Strategy 2005-2008*, 2005), active citizenship (*Making a European Area of Lifelong Learning a Reality*). Conception is based on understanding that learning person is a person who has gained knowledge, skills, and values to manage outstandingly in personal, work and social life. Concept of active citizen assumes that an individual is participating in all spheres of society and community life - in cultural, economical and political/democratic sphere. Adult learner is seen as one who according to the law accomplishes at least 75% of curriculum by the period mentioned in the study program (*Estonian Lifelong Learning Strategy 2005-2008*, 2005).

Following contradictions can be pointed out:

*Estonian Lifelong Learning Strategy 2005-2008* defines adult learner narrowly and concept is not based on the holistic context of learning;

*Knowledge-based Estonia. Research, Development and Innovation Strategy 2001-2006* defines concept learning citizen as someone with existence of highly qualified and motivated specialists and development of human capital. The emphasis is on higher education but the context of the document is wider.

## Mezzo level

**A)** Learning organisation is understood as an organisation that supports learning on individual and collective level which endorses continuing development (*Estonian Lifelong Learning Strategy 2005-2008; Making a European Area of Lifelong Learning a Reality*). As a distinction of learning organisation is seen innovation management and knowledge transition (*Knowledge-based Estonia. Research, Development and Innovation Strategy 2001-2006*). Learning organisation is characterised as process of renewal with continues feedback, critical reflection of prior experience and connection to new knowledge and conceptions in every level to support new development trends (*Study-Estonia*).

More general definitions of concepts can be applied to all organisations (*Estonian Lifelong Learning Strategy 2005-2008; Making a European Area of Lifelong Learning a Reality*);

*Study-Estonia* has focused mainly on educational institutions where are processes of feedback and evaluation for finding new trends or ways for development.

**B)** Learning city/region is understood as learning area (*Making a European Area of Lifelong Learning a Reality*) and learning community (*Estonian Lifelong Learning Strategy 2005-2008*), emphasised is cooperation and partnership for promotion of learning culture and meet the needs of individuals and organisations.

## Macro level

Concept knowledge based society is stressing on creation and implementation of new knowledge. *Knowledge-based Estonia. Research, Development and Innovation Strategy 2001-2006* puts stress on high qualification and motivated specialists existence and development of human capital which provides competitiveness of economy and labour and is a source for life quality growth.

*Education Strategy Study-Estonia* uses the concept learning society that is understood as a network of lifelong learning individuals and organisations which by its meaning is close to learning community concept (*Estonian Lifelong Learning Strategy 2005-2008; Making a European Area of Lifelong Learning a Reality*).

There is no clear understanding on the concepts used in various documents. This may be due to the fact that documents have been compiled in different time span and by various experts. Confusion of the concepts has created a situation where terms are in everyday practice not used in one sole meaning.

Example from the interview with Prof. Emer. Talvi Märja:

*“...On the topic of lifelong learning we have communicated with all ministers and tried to explain. All are nodding and understand but when it goes to practice then again its renovation of schools.”*

*“...For example we tried to create a database where learning/studying opportunities could be listed. Ministers said that it is not needed as there is a curricula index/database...”*

(Interviewed in 06.04.2006 on the purpose of current report)

Henceforth compiling of strategic documents can be based on *Estonian Lifelong Learning Strategy 2005-2008* as this strategy is official document accepted by Estonian Government in 2005 and strategy forms the bases for lifelong learning policy.

## 5. LEGISLATION AND POLICY

In 1993 Estonian Parliament accepted Adult Education Act. Act regulated following:

- Formal education acquired within the adult education system outside the daily study form or full-time study (basic, secondary or higher education)
- Adults' professional training
- Informal adult education
- Ensuring study opportunities
- Organization of training
- Financing training
- Implementing provision

Among other things, the act prescribes which other legislation is applied to adult education, the activities of the Adult Education Council.

The act enacts the financing of training from state budget for:

- Unemployed
- Public officials (2-4% of the annual wage fund)
- Teachers (3% of the annual wage fund)

Local municipality finances the job related training for workers of local municipalities. According to the act adult who is studying in general education, vocational education or in higher education and also is working can have max 49 calendar days for studying leave. For in-service studies 14 calendar days are given with retaining of average salary; for participation in non-formal training learner can apply for 7 days leave without salary.

Another important area that impacts adult learners and training providers is legislation of financing and taxes. In 1994 Estonian Government acknowledged decree for applying financing for adult trainings from State budget (decree nr 1004).

Income Tax Act enacts that a person has a right to deduct the expenses incurred by him/her during a period of taxation on the training of himself/herself. The act regulates taxation of training expenses. Training expenses are certified expenses incurred for studying at a state or local government educational establishment, university in public law, private school which holds a training licence.

If employer wishes to pay for the employees studies in general, vocational or higher education the employer has to pay value added tax. According to the act an individual should pay for his/her studies if he/she wishes to participate in adult education (Income

Tax Act). This increases the inequality in training as people with lower income have difficulties in participation.

Since 2006 one of the most important strategic documents about adult education in Estonia is *Estonian Lifelong Learning Strategy 2005-2008*. Strategy includes descriptions of lifelong learning goals, measures, and activities for Estonia. Strategy enacts plans for realisation of lifelong learning goals. According to the strategy it is aimed to give equal opportunities for learning; to assure quality of education and training; information of learning opportunities and counselling system for adults; to develop professional qualification system and to have active participation in policy development in all levels. As a weakness of the strategy can be said unsteady financing.

LLL Policy is connected to Labour Market Policy –Employment Service Act regulate the labour market services provided to unemployed people, including state financed work related training (Töötuturu teenuste ja –toetuse seadus 2006).

During past 5 years several important changes has been done in those laws:

- Adults have the opportunity to pass gymnasium level curricula course by course (Põhikooli- ja gümnaasiumiseadus 1993)
- New improvement in vocational education law allows in vocational education take into consideration non formal and informal learning (Vocational Education Institutions Act 2000).
- Changes in University Act have started the processes to join Bologna program.

Estonia National Development Plan for the implementation of the EU structural funds single programming document 2004 – 2006 (RAK) is important in the point of view of lifelong learning (Eesti riiklik arengukava Euroopa Liidu struktuurifondide kasutuselevõtuks – ühtne programmdokument 2003-2006, 2003). The first priority of RAK is to develop human resources. The Human Resource Development priority is aimed at increasing and using Estonia's labour force potential in a more effective way. The first priority include 4 measures:

**Measure 1.1:** Educational System Supporting the Flexibility and Employability of the Labour Force and Providing Opportunities of Lifelong Learning for all. The general objective of the measure is human resource development and increased competitiveness on the labour market by providing training, improving the educational system and the conditions for lifelong learning.

The specific objectives of the measure are:

- Ensuring quality of education and training
- Ensuring equal opportunities for accessing education
- Ensuring possibilities and providing conditions for lifelong learning

**Measure 1.2:** Human Resource Development Increasing the Competitiveness of Enterprises. The general objective of the measure is to prevent unemployment through the promotion of skilled, trained and adaptable workforce. Measure will support the training of

persons employed in enterprises in order to improve and maintain employability, develop entrepreneurship, to promote the conditions facilitating job creation, as well as to boost human potential in research, science and technology.

The specific objectives of the measure are:

- Achieving an increase in investment in human resources, particularly in investments by enterprises in the training of adults with a view to promoting productivity and competitiveness;
- Encouraging potential entrepreneurs to start their own business by providing them with necessary business management skills;
- Increasing the awareness of business managers about new management methods and export and marketing by promoting the respective training;
- Enabling the implementation of new technologies and quality assurance systems in enterprises by supporting acquisition of necessary skills.

**Measure 1.3:** Inclusive Labour Market. The overall objective of the measure is a more extensive and efficient prevention and alleviation of unemployment and, thus, poverty and social exclusion, and enhancing social inclusion.

The specific objectives of the measure are:

- Faster and more extensive integration to the labour market of the unemployed and employees at the risk of becoming unemployed due to declared redundancy
- Facilitating access to employment of those the most excluded from the labour market
- supporting acquisition of necessary skills.
- Improving the efficiency and quality of employment services

**Measure 1.4:** Enhancing Administrative Capacity. The general objective of the measure is to enhance administrative capacity of the central government (including county governments), municipalities and associations of municipalities.

Specific objectives are:

- To increase professional skills in the public administration;
- To ensure sustainable and high quality public service training system;
- To improve management quality in the public administration by supporting management capacity building.

In the process of compiling these strategic document following EU, UNESCO and OESCD documents were taken under the consideration:

- Lifelong Learning Memorandum 2000

- Europe Lifelong Learning Area 2002
- Lisbon Strategy 2000
- National Overview of Estonian educational policy

NGO Estonia Education Forum (a partner of Education and Science Ministry) has contract with UNESCO a program *Education for All* to implement the ideas of the program ([www.haridusfoorum.ee](http://www.haridusfoorum.ee)).

Ministry of Education and Science is the creator of lifelong learning on the state level. Since 2003 they also have an adult education division and with the act of Government Council of Adult Education has been created. The mission of the council is to advise government in adult education issues. Unfortunately isn't the work of council efficient and intensive enough.

In the work field of adult education all ministries, social partners and stakeholders has been included. Also Education Forum, Estonian Non-formal Adult Education Association, ETKA ANDRAS, Foundation of Lifelong Learning Development INNOVE, Foundation Archimedes, Kutsekvalifikatsiooni sihtasutus, Eesti Akadeemilise Täiendkoolituse Koostöövõrk, Eesti Kutsehariduse Edendamise Ühing. Under ministry of Internal Affairs in a work group that including other things works with active citizenship education.

## 6. MAIN PATTERNS OF PROVISION & PARTICIPATION

In Estonia the developments in patterns of provision and participation in LLL are highly dependent on the whole process of social changes occurred during the last fifteen years. Given the monopoly of the socialist state and its institutions on the provision and financing of the whole range of institutionalized educational activities, stable structure of economy and secure material life conditions of the population, the patterns of participation in LLL during these years were and are dependent first of all on the way how state abandon this monopoly, how (in which way, to what extent, what was the speed) market mechanisms had been allowed to work.

It is differentiated state involvement into development of continuing versus initial education (former being clearly lagging behind the latter in terms of national strategies and actions), that explain why in Estonia, just as in other CEEC-new EU member states, a very marked imbalance exists between initial education and continuing training systems (Masson 2005: 11). While system of initial education seems to operate quite efficiently (at least in quantitative terms) and reveal superior (to EU15) performance, there are lack of education and training provisions for adults in Estonia.

Continuing education and training is largely governed by the market. Private training companies and self-employed experts are the main adult education and training providers, while for the significant majority of them training is one of their „additional activities“ apart from the core business. Rather small (having only up to 2 full-time trainers) training institutions dominate. These institutions to a great extent rely on temporary external trainers. Evaluation of their competency and improving of their skills is an important problem. Most of the private institutions are concentrated in Tallinn, capital of Estonian Republic. Their main „guarantee of quality“ is the license issued by Ministry of Education. According to data from national survey on training institutions (2000/2001), most of adult education institutions had the license. Unfortunately Estonia is lacking a standardized information system collecting data on adult education and training. Information on institutions offering an adult education is rather scarce and it had been analyzed mainly on an ad hoc basis, especially during the pre-accession period.

Continuing training is financed by the state currently mainly for civil servants (at a level of 2-4% of the annual “salary fund”) and teachers in state and municipal schools (at a minimum of 3% of the annual “salary fund”), as well as for the unemployed (a very limited extent of active labour policy expenses % of GDP). Since 2004 EU funds are also being used to finance adult education (see chapter 5). Non-formal education is usually paid by the individual or entity participating in it. Only the salaries of staff and management of those adult education institutions with a teaching permit are state funded via the MoE. Work-related training is generally financed by the employer, but resources can be provided by local governments or by employee. The in-service training and retraining of an employee, paid by the employer, is not liable for income tax in the case of retrenchment. According to Eurostat Estonia ranked rather in the top of the scale (compared with most other candidate countries) regarding the total expenditure per employee on CVT courses in 1999. At the same time it has to be taken into account that costs for CVT courses are rather high in Estonia and that employers and management are frequently

participating in continuing training themselves. Statistical data regarding overall financial contributions by private enterprises or individuals are currently not available.

Given the rapid structural changes of economy, shrinking in the total demand for labour and deep shifts in the structure of this demand, lack of financial resources (largely due to reform of currency in 1992) at the disposal of population, fast marketization of continuing education had an decisive and clearly “splitting” impact on patterns of participation. Researches reveal that the demand for training is in strict correlation with financial resources of the potential customer.

While currently there are no clear data available showing the overall participation of Estonian adults in continuing training (the main sources of information are regular but limited data of Estonian Labour Force Surveys - ELFS, and only few surveys focused on adult education or specific target groups), all available data indicates that the participation rate of adults in continuing education has been relatively low and the patterns of participation rather contribute to deepening social inequalities. Thus, according to ELFS in 2003 15% of the Estonian population aged 25-64 years old participated in non-formal education. It is below the average of EU25 (17%). Analyses of ELFS data on participation in non-formal education during the four weeks previous to survey does not reveal any clear positive or negative trend during the last 10 years in the participation rate.

Those groups in most need of training (non-Estonians, less educated, older people, lower income groups, out of Tallinn) participated less in continuing training than others, paid more for the training themselves and are more dependent on training offered by the employment office. The fact time that women have been more actively participate in continuing education compared with men is explained first of all by the prevalence of women among the teachers and civil servants, whose training is financed by state.

## 7. EFFECTIVENESS OF LLL POLICIES

The new [integrated guidelines](#) adopted in 2005 in connection with the Lisbon Strategy also include the objective of lifelong learning. The central role of the learner, the importance of equal opportunities, quality and relevance of learning possibilities must be at the centre of the strategies to make lifelong learning a reality in Europe (European year of lifelong learning 1996).

The creation and implementation of EU Lifelong Learning policy doesn't happen with an overnight, but needs continuous work and support from all potential stakeholders of society. Starting with learners and ending with heads of the state. The transformation of traditional systems is the first step towards allowing everyone to access lifelong learning. The building blocks of EU Lifelong Learning policy have been identified in the light of the need to:

- develop partnerships at all levels of public administration (national, regional and local) but also between suppliers of educational services (schools, universities, etc.) and civil society in the broad sense (businesses, social partners, local associations, etc.);
- identify the needs of the learner and labour market in the context of the knowledge society (including for example the new information technologies);
- identify adequate resources by encouraging an increase in public and private investment and new investment models;
- make learning more accessible notably by multiplying local learning centres at the workplace and by facilitating learning on the job. Specific efforts are needed for persons who are particularly by exclusion, including the disabled, minorities and the rural community;
- create a learning culture to motivate (potential) learners, to increase levels of participation and to demonstrate the need for learning at all ages;
- put in place evaluation and quality control mechanisms. By the beginning of 2003 the Commission was to launch a prize for firms which invest in lifelong learning in order to award and draw attention to good practices in this area.

(European year of lifelong learning 1996).

We can say that Estonia is still stepping the first step and is struggling with the tasks listed above. The deficient Estonia Lifelong Learning Policy is also reflected in the diminishing number of adult learners in Estonia. According to Estonian Ministry of Education and Science in year 2005 only 5, 9 % on adults participated in a training course, the number shows the tendency to declining. (*Haridus- ja Teadusministeeriumi valitsemisala arengukava . Tark ja Tegus rahvas. 2007 – 2010, 2006*)

Since the Lisbon Strategy launched with new EU education policy, a few documents, strategies or legislation consisting EU Lifelong Learning Policy or linked to it have been created and even fewer implemented in Estonia. The main achievements have been done in the field on mobility: new standard of higher education, more ERASMUS students,

promotion of e-learning opportunities and increased mobility between different levels of education ([www.hm.ee](http://www.hm.ee)).

The cornerstone of Estonia Lifelong Learning Policy is *Estonian Lifelong Learning Strategy 2005 – 2008* (2005), approved by the Government of Estonia in 2005. In the strategy are stated the conceptual starting points and presumptions of Estonian Lifelong Learning Policy, priorities for the years 2004 – 2006 and priorities of actions. *Estonian Lifelong Learning Strategy 2005 – 2008* (2005) is closely linked to the aims of all the EU Lifelong Learning Policies (*Estonian Lifelong Learning Strategy 2005 – 2008*, 2005). Unfortunately *Estonian Lifelong Learning Strategy* is not yet fully in practice and the other education strategies that are not so friendly towards lifelong learning, are leading the education policy, because the action plan of *Lifelong Learning Strategy* (2005) depends on the *Ministry of Estonian Education and Science Plan of Development for the years 2007 – 2010* (*Haridus- ja Teadusministeeriumi valitsemisala arengukava. Tark ja Tegus rahvas. 2007 – 2010*, 2006)

For example the objects stated in *Estonian Ministry of Education and Research Plan of Development for the years 2007 – 2010* (2006) reflect only partly the aims of *Estonian Lifelong Learning Strategy* (2006) or EU Lifelong Learning Policy. The first goal of the development plan is “equal opportunities for lifelong education”, but only direct action connected to lifelong learning is “to create conditions for motivating and appealing lifelong learning” and less than 0, 2 % of the education budget is given for it. Another important aim of the plan is “to create national qualification system to identify the needs of labour market, to describe the results of different levels of education and learning and to promote the mobility of learners“. Only evaluation indicator to that goal is the amount of adults participating in different training courses. (*Haridus- ja Teadusministeeriumi valitsemisala arengukava. Tark ja Tegus rahvas. 2007 – 2010*, 2006) The development plan does emphasize the importance of vocational training and aims of the development of vocational training carries the ideas of Lifelong Learning Policy of EU. *The Development Plan for the Estonian Vocational Education and Training System 2005-2008* (2005), which serves as a basis for future steps toward modernisation of the education system and reflects the EU Lifelong Learning Policies is being drafted. ([www.hm.ee](http://www.hm.ee))

Next to the development plan, the Ministry of Education and Research together with ANDRAS (Association of Estonian Adult Educators ANDRAS) have compiled *Priorities of National Adult Education. Recommendations for 2003 – 2004*. (*Täiskasvanuhariduse riiklikud prioriteetidid soovitud aastateks 2003 –2004*, 2001). The priorities were in the context of the strategic objective of Lifelong Learning Policy set out by the [Lisbon European Council](#) in March 2000, to enable the EU to become the most competitive and dynamic knowledge economy in the world, the guiding principle of the integrated policy cooperation framework *Education and Training 2010* is lifelong learning, in synergy with the relevant elements of [youth](#), [employment](#), [social inclusion](#) and [research](#) policies (European area of lifelong learning 2001). Unfortunately the recommendations of priorities were in the large picture recommendations and were not implemented in 2003 or 2004.

In addition to lifelong learning strategies, the education strategy is relevant. The aim of *Estonian Education Strategy Study-Estonia* (Õpi-Eesti) completed in 2001 was to capture and envision the trends of Estonian education system. Two brief chapters in the strategy were also dedicated to adult education, although none to lifelong learning in general. Both of them were very vaguely influenced by EU Lifelong Learning Policy and only stated the

importance of adult education and strategies of adult education. (Haridusstrateegia ÕPI-EESTI 2001)

The importance of lifelong learning was 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* (Strateegia Säästev Eesti 21, 2003). In the both documents lifelong learning was seen as a tool to strengthen economy.

It's possible that in the light of *Estonian Lifelong Learning Strategy 2005 – 2008* (2005) and trends of economy, the EU policy of Lifelong Learning will be put into practice and outdated regulations like Adult Education Act will be overlooked and modified according to the aims of EU Lifelong Learning policy and all the other steps needed to implement EU new education policy will be taken.

## 8. BROADER SOCIAL POLICY & LLL

Education and training policies are central to the creation and transmission of knowledge and are a determining factor in each society's potential for innovation. They are therefore central to this new dynamic situation, complementing and acting in synergy with other areas of Community action, including employment, social inclusion, research and innovation, culture and youth policy, enterprise policy, the information society, economic policy and the internal market. (Education & Training 2010, 2004)

In the last decade, Estonian social system and educational life has been supported by various EU support and co-operation programs of which the EU Phare program, Socrates and Leonardo da Vinci are the most well known. The EU structural funds were opened for Estonia in 2004, with the development of education being supported by Measure 1.1 of the National Development Plan (NDP) *Educational System Supporting the Flexibility and Employability of the Labour Force and Providing Opportunities of Lifelong Learning for All*. The objective of the measure is to increase competitiveness of the labour market by raising the quality of education and training. Four rounds of application had been held by November 2006. A total of 146 projects were accepted eligible for support. According to the results, a total of 58% of the ESF resources have been used by November 2005. Also Measure 1.3 has played a significance importance. Measure 1.3 *Inclusive Labour Market*, is designed for providing all-around assistance to the unemployed, restoring their professional skills, and finding them a job. The support serves the aim of improving risk groups integration to the labour market. The measure supports in-service training and retraining of the unemployed and persons declared redundant; enhancement of the work capacity and employability of risk groups; providing labour market-related Estonian language training to persons with insufficient knowledge of Estonian; creation of subsidized jobs, assisted or sheltered jobs and other transitional employment arrangements; start-up aid for entrepreneurs; development of measures for inclusion of and re-integration of women into the labour market; further development of labour market services. The European Social Fund has allocated a total of 413,6 million crowns for implementation of Measure 1.3 in 2004 – 2006. The Labour Market Board in co-operation with the Ministry of Social Affairs implements measure 1.3. (European Social Fund in Estonia: to one and all 2005)

One of the strategically aims of Estonian Ministry of Social Affairs and priorities for the year 2004 was to increase the employment. In order to do that Lifelong Learning Policy were being used. EU Lifelong Learning Policy has influenced Estonian employment policy in the terms of providing extra support, guidance and special training for people with special needs and long-term unemployed. In 2004 Estonian Labour Market Board implemented new concept of labour market measures to offer individual labour market service, especially designed to adjust the needs of unemployed people with disadvantages (European Social Fund in Estonia: to one and all 2005).

The end of 2005 Estonian Ministry of Education and Science, University of Tartu, Tallinn Technical University and Tallinn University signed a mutual contract to provide students with serious disability a mentor service. The service is financed by the Ministry of Education and Science and will approve the accessibility of education for students with disabilities. [www.hm.ee](http://www.hm.ee)

In accession to the European Union and after the transitional period one of the basic principles of open common market also extends to Estonia: the opportunity of workers to have a free choice of place of work and residence all over Europe. In order to practice that opportunity steps linked to EU Lifelong Learning Policy has been made. In addition to considerably more numerous opportunities of the Estonian employees to work abroad the latter change also involves the arrival of employees from other countries to Estonia. (*Towards a human-centred society 2004*).

Estonia participates in the European Union's social inclusion process through Open Method of Coordination (OMC). Within the frame of the latter in 2003 the Joint Inclusion Memorandum and in summer 2004 the National Action Plan for Social Inclusion for 2004-2006 were prepared. Social inclusion means the opportunity of all persons to fully participate in social life, including working and being economically active. Social inclusion is a further development of the concept of poverty. Unlike poverty the definition of inclusion involves multi-dimensional nature of deprivation, where social exclusion plays an important role in addition to income. Exclusion means the situation, when a person has no or limited access to resources and services. The latter could be for example the possibility to work or access to social insurance, education, healthcare services, to information technology, culture and possibilities to spend one's leisure time (*Joint Memorandum on Social Inclusion of Estonia 2003*). Activities influenced by EU Lifelong Learning Policy can to reduce social seclusion.

Estonian Ministry of Education and Research *Plan of Development for the years 2007 - 2010* lists following aims connected to EU Lifelong Learning Policy:

- 1) Equal opportunities for lifelong education;
- 2) To create flexible opportunities that takes under consideration different needs of learner and society to participate in vocational and higher education;
- 3) To create national qualification system to identify the needs of labour market, to describe the results of different levels of education and learning and to promote the mobility of learners.

(Haridus- ja Teadusministeeriumi valitsemisala arengukava. Tark ja Tegus rahvas. 2007 – 2010, 2006)

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## GENERAL CONTEXT OF THE LLL 2010 RESEARCH PROJECT

In March 2000, the then 15 European leaders committed the European Union to become by 2010 “the most dynamic and competitive knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment”. The Lisbon strategy, as it has come to be known, was a comprehensive but interdependent series of reforms, which has significant implications for a whole range of social policies, including policies for learning.

As part of the Lisbon strategy, the European Union has set the goal of raising the number of adults participating in lifelong learning to 12.5% by 2010. However, the proportion of learning adults in Europe differs widely across countries. The project "**Towards a Lifelong Learning Society in Europe: the contribution of the education system**", which forms part of the European Commission’s 6<sup>th</sup> Framework Research Program, is dedicated to identifying the reasons behind these differences and to studying the policies and practices related to adults’ participation in and access to lifelong learning in a number of European countries (see project's web-page [http:// LLL2010.tlu.ee](http://LLL2010.tlu.ee)).

The project involves researchers from thirteen countries and regions of Europe: Scotland, England, Ireland, Austria, Belgium, Slovenia, Czech Republic, Estonia, Lithuania, Hungary, Bulgaria, Norway and Russia.

### Project objectives

The objectives of this project are to:

- Show to what extent the countries differ in terms of patterns of lifelong learning.
- Reveal how these differences depend upon specific institutions and policies of each country.
- Assess the contribution of each country’s education system to the development of lifelong learning.
- Trace the ways institutional and policy prerequisites for lifelong learning have been developed in European countries.
- Identify the barriers to participation in lifelong learning in terms of policies, educational institutions, enterprises’ practices and potential learners’ motivation.
- Identify the best solutions and most successful practices in terms of participation in lifelong learning and to decide to what extent these would be applicable in other countries.
- Propose changes, which would enhance adult participation in lifelong learning and decrease social exclusion.

The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

### Potential impact

Project is expected to contribute both to competitiveness and cohesion of the EU by (a) developing and carrying out a joint agenda for a better understanding of the tensions between the knowledge-based society, lifelong learning and social inclusion in the context of enlargement of the EU and globalisation, (b) identification of best practices and

suggestion of ways for implementation in order to reach the objectives for lifelong learning. The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

### The plan for disseminating the knowledge

The project aims to examine and report on national differences in approaching formal lifelong learning, but also to assist policymakers and practitioners in learning appropriate lessons from contrasting practice in other countries. Therefore, disseminating knowledge to relevant audiences – individuals, institutional actors and policymakers – is of the core issues within this project, and so dissemination activity will take place throughout the life of the project.

The preliminary results will be discussed in the workshops and conferences and introduced to national as well as international audiences. The results of the different research projects within LLL2010 will be presented in five comparative reports – one per subproject – and a final report, and two books will be published as a result of the project. A Conference “The Contribution of the Education System to Lifelong Learning”, scheduled in the end of the project, is aimed at discussing findings, conclusions and expert opinions on a European level.

To contribute to scientific discussion and enhance comparative studies in the field, further analysis of the results of the research will take place in articles published in specialized and interdisciplinary journals. As LLL2010 will undertake a number of original studies, the data, questionnaires and codebooks, and all the other relevant materials generated in the project will be made available to the scientific community at large.

### Results achieved

The present summary covers the findings of the team during the first Sub-project, ‘Review of Literature and Policy Documents’; the full comparative report of the results of this Subproject will be made available on the project website by the end of 2007. The Sub-project undertook comparative research on lifelong learning policies and practices. The aim was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe.

### Purpose & Methodology of Sub-project 1

The purpose of the first Sub-project was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe. The nature of the educational and lifelong learning regimes in each country, and how they are changing, were investigated. The report considers how far lifelong learning has entered the policy rhetoric in each country, and in what forms it has done so – in particular, how far it has been shaped by the European Union’s thinking, or by national or other influences. It considers how far rhetoric and practice diverge in each country. It also considers how far actions of different areas of policy and government support lifelong learning, or hinder its development.

The Sub-project applied a comparative documentary analysis of approaches to lifelong learning, through analysing national policy documents and addressing lifelong learning in participating countries.

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2. Higher Institute for Labour Studies, Catholic University of Leuven, Belgium
3. University of Nottingham, England, United Kingdom
4. Moray House School of Education, University of Edinburgh, Scotland, United Kingdom
5. Educational Disadvantage Centre, Centre for Human Development at St. Patrick's College, Dublin City University, Ireland
6. Fafo Institute for Labour and Social Research, Oslo, Norway
7. Slovenian Institute for Adult Education, Ljubljana, Slovenia
8. TÁRKI Social Research Centre, Budapest, Hungary
9. Centre for International Relations and Studies, Mykolo Romerio University, Vilnius, Lithuania
10. Institute of Sociology, Bukarest, Bulgaria
11. St. Petersburg State University: Department of Sociology, Department of Retraining and Improvement of Professional Skills for Sociology and Social Work, Russia
12. 3s research laboratory, Vienna / Danube University, Krems, Austria
13. The National Training Fund, Prague, Czech Republic
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