



ReTraVaSSEV

Training Soft Skills Trainers

Desktop study

**“ADULT EDUCATION: HISTORY, DEVELOPMENTS,
CURRENT STRATEGIES AND CHALLENGES”**

February, 2018



Abstract

The desktop study has been carried out as a part of Erasmus+ KA2 Strategic partnership for Adult Learning “Recognition, Training and Validation of Soft Skills for Employability of Vulnerable Groups (ReTraVaSSEV)” project.

The main objective of the project is to train trainers to recognise, train and validate a top-5 of soft skills that are most relevant for employability, better social integration or more successful education for vulnerable groups, and this on both national and European level. This way the project will strengthen human capital and employability by focussing on the development of soft skills on a European level. Education and training should equip everyone with a broad range of skills which opens doors to development in a complex society with fast-evolving workplaces.

The desktop study outlines the adult education history and developments, current adult education strategies and challenges, skills and qualifications adults need to re-enter into education or training as well as labour market trends in the project partner countries: Belgium, Sweden, The Netherlands, Portugal, Cyprus and Former Yugoslav Republic of Macedonia.

The paper starts with a brief historical introduction to adult education development in partner countries. It is followed by the adult education definitions and possible discrepancies in the terminology as well the overall situation of participation in adult education – existing and expected participation levels, barriers adults are facing and existing incentives.

The paper then proceeds to describe the skills and qualifications needed in order to re-enter into education or training in partner countries.

The report closes with an overview of current labour market situation and trends in each partner country respectively. This provides the insight into the occupations and qualifications prospects as well as allows us to make educated assumptions what skills may be needed for the future labour market.

The desktop study is largely based on both National and European reports, existing research and statistics and it seeks to compare and contrast the adult education – developments, challenges and existing strategies – in partner countries respectively.

Please note that starting from 1981 education and training is a matter of the Flemish Government, while employment is a matter of the Belgian Federal Government. When discussing education in Belgium, we refer to the situation in Flanders and when discussing employment we refer to the whole of Belgium.

Disclaimer: This project has been funded with support from the European Commission. This publication reflects the views only of the author (s), and the Commission cannot be held responsible for any use which may be made of the information contained here.



Contents

Abstract	1
1. ADULT EDUCATION STRATEGIES AND CHALLENGES.....	4
1.1. BRIEF HISTORY OF ADULT EDUCATION	4
1.2. DEFINITIONS AND UNDERSTANDING ADULT EDUCATION.....	6
1.3. ADULT EDUCATION AIMS, PRIORITIES AND OBJECTIVES.....	10
1.4. CURRENT CHALLENGES IN ADULT EDUCATION.....	11
1.5. PARTICIPATION IN ADULT EDUCATION.....	12
2. SKILLS BASE AND QUALIFICATIONS OF ADULTS RE-ENTERING EDUCATION OR TRAINING.....	14
3. ANALYSIS OF LABOUR MARKET.....	15
3.1. CURRENT LABOUR MARKET SITUATION AND FORECASTS.....	15
3.2. LABOUR FORCE TRENDS: OCCUPATIONS AND QUALIFICATIONS PROSPECTS	16
3.3. SKILLS NEEDED FOR EMPLOYMENT AND EMPLOYERS.....	18



1. ADULT EDUCATION STRATEGIES AND CHALLENGES

1.1. BRIEF HISTORY OF ADULT EDUCATION

Despite the differences in the year of the introduction of adult education, all the partner countries have introduced adult education as a way to provide basic skills to citizens as well as encourage employability targeting low skills or low qualification citizens. During the years of adult education development, it also became a “tool” to develop people’s personal and social skills however still focusing on the employability of the participants.

In all the countries adult education is offered by public as well as private organisations funded by the government and/or people that is to some extent regulated by the government and national laws.

Sweden

From all the partner countries the earliest start of institutionalised adult education system was in Sweden which dates back to 1868 when Folk high schools were founded. During this period the forms of adult education consisted of public lectures, correspondence courses, libraries, study associations and study circles.

After the Second World War, adult education in Sweden as well as in Belgium expanded: The government (in Sweden) and private schools (Belgium) started offering evening classes and courses.

In 1968 municipal adult education (MAE Komwux) was established for adults to study in order to get qualifications at compulsory or secondary school level. It mainly targeted people with the lowest level of education as well as people having trouble into getting to the labour market. In the following years later loan system and study leave from work were introduced which led to daytime studies.

In 1991 government reform was introduced shifting adult education from the state to the municipalities. This led to adult education being organised by franchises for public sector in most of Swedish municipalities.¹

The Netherlands, Belgium and Cyprus

In the Netherlands, Belgium and Cyprus the institutionalised adult education systems were introduced in 1960s and 1970s.

During the 1960’s the Netherlands have seen a boom in adult education especially in second chance and second-way adult education targeting low-qualified and disadvantaged groups. From 1980’s adult education was focused on vocational education and training as well as basic skills development. From 1996 Education

¹ Kersh N.; Toiviainen H. (2017) Final Report for: *Broad Research On Adult Education In The EU*



Centres in Regions (ROC's) are responsible for both Secondary Vocation Educational Education (MBO) and adult education.²

During the 1960s technical and vocational adult education was established in the Flemish part of Belgium, while other forms of adult education were introduced in following decades. From 1990s, 29 adult basic education centres were established targeting adults with low skills or education level as well as immigrants who struggled with Dutch language.³ It is important to mention that German speaking part adult education roots date back to 1840s when Sunday schools and other educational organisations provided access to primary education.

Cyprus adult education system dates back to 1950s when the first adult education centres were established offering classes in rural areas in order to combat high illiteracy at that time. Other adult education institutions including Cyprus Productivity centre, technical schools, state institutes of foreign languages, etc. were established in 1960's expanding adult education to urban areas as well. These institutions offered courses of broad topics – basic education, vocational training, family therapy etc. The purpose of these organisations was to encourage employment and cultural education.⁴

Nowadays formal and non- formal adult education is well established and offered by many organisations – adult education centres, universities, evening gymnasiums and technical schools, open schools, VET centres which can be both public and private.

All the 395 adult education centres are all under the supervision of the Ministry of Primary Education and Ministry of Education and are operating in rural and urban areas. These centres offer afternoon and evening classes focused on various subjects aimed at personal, professional and social development.

Portugal

In Portugal, first laws regarding the adult education were introduced in 1950s. During the 1960s and 1970s technical courses (vocational education), courses for workers (popular courses) and literacy courses for the most disadvantaged population were introduced.

In 1980s and 1990s various reforms in adult education took place. During these decades associations promoting the education of the working classes were established.

The Portuguese National Agency for Education and Training of Adults was created in 1999. The agency contributed to first adult education and training courses focused on basic skills (mathematics, computer science and languages) as well as gave the start to the national system of recognition, validation and certification (RVCC). The same year Anefa (basis of the system of recognition and validation of competences) was introduced.

² RetraVaSSEV National study: The Netherlands. Internal documentation, available upon request.

³ National Center on Education and the Economy (2006). *An Overview of Education on Flemish Belgium*

⁴ Gravani, M; Ioannidou A. (2014): *Adult and continuing education in Cyprus*



Since 2002, Portugal has developed the national system of recognition, validation and certification (RVCC) carried out in a national network of centres (later replaced by new opportunities centres when New opportunities programme by the CQEP in 2013) for recognising, validating and certifying competences hosted in public or private local bodies which are established in local communities.⁵

In 2017, CQEP centres were replaced by Qualifica Programme and centres, which aims to improve levels of education and training of adults, contributing to improvement of qualifications and employability.

Former Yugoslav Republic of Macedonia (FYROM)

Former Yugoslav Republic of Macedonia due to late independence has faced not only economic and political transformation, but it also has the challenge for educational transformation since its independence in 1991. First laws regarding adult education were introduced and Adult Education Centre was established in 2008.

The main objective of adult education centre was to respond to the needs of the labour market and to assist individuals in their personal development. Centre activities range of non-formal education programmes, providing primary education and vocational secondary education to adults to general promotion of adult education.⁶

Like Portugal, FYROM is also working towards Validation of non-formal and Informal learning (VNFIL) and Adult Education Centre is also responsible for it. Creation of VNFIL arrangements has started in 2014 and preparatory phase will continue till 2018. The final legislation is expected to be prepared by 2020.

1.2. DEFINITIONS AND UNDERSTANDING ADULT EDUCATION

While EU has introduced official definitions when it comes to adult education terms such as *adult education, adult learner, learning – non formal, formal and informal and lifelong learning*, some of the countries have their own definitions, thus it is important to define these terms and the meaning to each country.

Adult education

The official definition by European Commission is “*general or vocational education provided for adults after initial education and training for professional and/or personal purposes, and which aims to:*

- *provide general education for adults in topics of particular interest to them (e. g. in open universities);*
- *provide compensatory learning in basic skills which individuals may not have acquired earlier in their initial education or training (such as literacy, numeracy) and thus to;*
- *give access to qualifications not gained, for various reasons, in the initial education and training system;*

⁵ European Association for the Education of Adults (2011): *Country Report on Adult Education in PORTUGAL*

⁶ Development And State Of The Adult Learning And Education (2008): National Report of Republic of Macedonia



• *acquire, improve or update knowledge, skills or competences in a specific field: this is continuing education and training.*⁷

Cyprus doesn't have its national definition of adult education, thus the country unofficially adopts the EU definition and refers to educational opportunities offered for adults in the form of formal, non-formal education as well as vocational education and training.

The Netherlands and FYROM also see adult education as all kinds of forms of education for adult learners in a formal and non-formal way.

While Cyprus and The Netherlands combine non-formal and formal education under "adult education" definition, Sweden and Belgium clearly distinguish 2 separate definitions when referring to adult education - Formal Adult Education and Non Formal Education.

In Sweden Formal Education refers to municipality run adult education (komvux), adult education for intellectually disabled (sär vux) and Swedish for immigrants (sfi), and non-formal adult education (Folkbildning) refers to education run by Folk High Schools and Study Associations and focused on adults with little formal education.⁸

In Belgium, "Formal Education" refers to education provided in the system of schools, colleges, universities and other formal educational institutions that normally constitute a continuous 'ladder' of education. Such education leads to certification which leads to the next educational level. "Non-Formal Education" includes any organised and sustained educational activities that do not correspond exactly to the definition of formal education above. Non-Formal education takes place both within and outside educational institutions, for persons of all ages. Two key features of non-formal learning is that it does not directly involve certification or assessment, and its classes offer a potential bridge for the learner to the formal education system.⁹

Portugal, does not distinguish non formal and formal education in their definition, however contrary to Belgium it emphasizes the recognition, validation and certification of skills.

Adult learner

According to European Parliament and European Council official definition, "*adult learner is learner participating in adult education*"¹⁰

⁷ CEDEFOP – European Centre for the Development of Vocational Training (2014). Terminology of European education and training policy: a selection of 130 key terms. Luxembourg: Publications Office of the European Union.

<http://www.cedefop.europa.eu/en/publications-and-resources/publications/4117>

⁸ European INFONET adult education webpage: <http://www.infonet-ae.eu/country-overviews/sweden>

⁹ Vermeersch L. & Vandebroucke A. (2009), The access of adults to formal and nonformal adult education. Country report: Belgium (Flemish Community). LLL2010 project, Subproject 5. K.U.Leuven (University of Leuven) - Higher Institute for Labour Studies: Leuven.

¹⁰ DECISION No 1720/2006/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 15 November 2006 establishing an action programme in the field of lifelong learning



All the participating countries have the same understanding of the definition. Some countries include the exact age in the definition – In Portugal, The Netherlands adult learner is from 18 years old, in Belgium from 16 and in Cyprus from 15.

Formal Learning

Official definition by EU is *“Learning that occurs in an organized and structured environment (such as in an education or training institution or along the job activity) and is explicitly designated as learning (in terms of objectives, time or resources). Formal learning is intentional from the learner’s point of view. It typically leads to certification”*

The official EU definition is very broad, thus countries had adopted their own specific definitions to represent their educational systems.

Belgium, Sweden, and Cyprus have similar definitions putting the emphasis on the activities formal structure and naming the education providers – schools, colleges, universities, etc., while Netherlands puts emphasis on the diplomas and certifications.

Portugal and FYROM adopt similar definitions also giving more emphasis to certification and importance of the learning activities recognition by the national authorities coordinating education and training, however, excluding job activity as a form of formal learning.

Non-Formal Learning

Official definition by EU is *“Learning embedded in planned activities not explicitly designated as learning (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner’s point of view. Non-formal learning outcomes may be validated and may lead to certification”*

As mentioned above due very broad official EU term, countries have adopted their own definitions.

Portugal and Cyprus considers non-formal education as activities designated for learning, usually recognised by certification of attendance but not formally recognised by national authorities and not allowing progression to other levels of education and training.

The Netherlands also consider as activities designed by learning, but contrary to Portugal and Cyprus, these activities can be recognised by diploma or certificate that is accredited by a professional group or sector.

Definition used in Belgium as mentioned before describes non-formal education as activities that takes place both within and outside educational organisations which may not involve any assessment or certification.

Definitions in Sweden and FYROM do not emphasise on certification or validation.

FYROM sees adult education as organised processes of learning focused on training adults for jobs various social activities and personal development.



In Sweden non-formal education (folkbildning) refers to education run by Folk High Schools and Study Associations. The most common forms of folkbildning organised through the study associations are study circles and cultural programmes. They aim to increase knowledge, provide access to culture and individual cultural expression, and enhance personal and social development.¹¹

Informal Learning

Official definition by EU is *“Learning resulting from daily activities related to work, family or leisure. It is not organized or structured in terms of objectives, time or learning support. Informal learning is in most cases unintentional from the learner’s perspective. Informal learning outcomes may be validated and certified;*

While Sweden, Cyprus and FYROM adopt the official EU definition referring to informal learning as learning that occurs from daily life activities, Portugal has some differences in definition. Portugal describes informal learning as learning that occurs from daily life activities, however, contrary to EU definition, it emphasises that the learning process is intentional and deliberate.

The Netherlands refer to informal learning as experiential learning that occurs ‘by doing’ or by work-based learning.

In Belgium Informal learning is the learning and developing of skills in a wide variety of settings beyond the informal education and training system, whether through work experience, in-company training, digital resources, or volunteering. These skills can be validated – through identification and documentation, assessment and certification, with options leading to a partial or full qualification.

Lifelong Learning

Official definition by EU is *“All learning activity undertaken throughout life, which results in improving knowledge, know-how, skills, competences and/or qualifications for personal, social and/or professional reasons”*

In Belgium, lifelong learning is also known as life-wide learning or “continuous learning”, which refers to all forms of learning in which individuals and groups acquire knowledge and skills and learn attitudes that allow them to meaningfully integrate their personal, social, cultural and professional tasks into our rapidly changing society, while on the other hand Portugal sees lifelong learning as a concept that aggregates participation in some education activity in formal education – taught in educational institutions, leading to a level of schooling - and / or formal - organized training, professional activity or another, in a given area of competence, but this does not equal a school level.

Sweden, Cyprus, The Netherlands and FYROM like Belgium also see lifelong learning as all activities (not only formal education) which results in increased skills and competences.

¹¹ European Association for the Education of Adults (2011): *Country Report on Adult Education in SWEDEN*



1.3. ADULT EDUCATION AIMS, PRIORITIES AND OBJECTIVES

Belgium as well as Netherlands and Sweden revolve their adult education system of tomorrow around its core tasks of second-chance education, literacy, Dutch/Swedish as a second language. In doing so, it will give priority to sustainable qualifications and vulnerable target groups for which education makes a difference.¹²

Besides these core tasks, these countries want to strengthen formal adult education and reposition it in the educational landscape as a most important lever for social inclusion and social progress.

Swedish adult education system aims to educate people and provide them with skills necessary for work as well as to prepare participants for further higher education. Sweden also emphasizes on providing education for immigrants as well as vocational training. Furthermore Sweden adult education aims to increase democracy, participation in society and educational levels.

The Dutch adult education system also focuses on providing adults with basic skills such as speaking, reading, maths as well as health care skills.

Cyprus government promotes education as a way to the social, financial and cultural development of citizens and society in general. The aims coincide with the state's developmental policy and the wider aims of the Ministry of Education and Culture regarding the provision of "Lifelong Learning" opportunities for all the citizens of the Republic of Cyprus and the combating of educational inequalities so that citizens may be successfully integrated. The adult education is focused on teaching of foreign languages, professional and vocational skills for various target groups such as people with literacy difficulties, people with special needs, enclaved Cypriots, prisoners, mentally ill and elderly people.

FYROM National Comprehensive strategy for adult education sets up priorities such as improving the attractiveness and participation in adult education, establishing a quality assurance system within adult education, development of a prior learning recognition system, lowering the rate of illiteracy among the adults and expansion of the basic education of adults. As the main objectives FYROM government mentions the need to improve learners' motivation to participate in adult education, to ensure that there is open and equal access to non-formal adult education for all and to deliver learning that is relevant to employers and learners.

In Portugal, adult education has two main objectives: aiming to improve the qualification levels of adults who do not have basic or secondary education certificates and developing Vocational education and training for adults who do not have formal qualifications in their occupational areas, aiming to improve vocational qualification levels of beneficiaries.

¹² De Vice Minister-President Van De Vlaamse Regering En Vlaams Minister Van Onderwijs: *Conceptnota Aan De Vlaamse Regering*



1.4. CURRENT CHALLENGES IN ADULT EDUCATION

Two countries, Belgium and Sweden mentioned that one of the challenges they are facing is teaching Dutch/Swedish as a second language to immigrants in order for them to gain a better access to employment as well as rapid social integration. They also concluded that the raising number of youth without a secondary degree is one of the challenges they are facing at the moment.¹³

Belgium as well is experiencing challenges in dealing with the upscaling from secondary adult education in all its aspects: financial, human resources, organization, educational, while Sweden is struggling to find ways to improve the combination of vocational education and language education as well as to prepare highly qualified labour force.

Belgium, Cyprus, FYROM and The Netherlands emphasize that promotion of adult education opportunities to citizens and employers (trainings, seminars, etc.) has been a challenge.^{14 15}

The Netherlands are also experiencing some challenges while trying to design a secure connection that safeguards the three forms of education (formal, non-formal and informal) in practice as well as trying to personalise learning process and make it more flexible for students. Portugal as well feels the need to connect all educational activities that educational institutions can offer to adult learners, motivating and mobilising them towards education and learning, thus ensuring a better quality of the learning experiences of adult learners.¹⁶

Establishing an overarching quality framework for adult learning which will assure quality in non-formal adult learning (accreditation of providers, accreditation of programs offered) has been one of the main challenges in Cyprus and FYROM, while Portugal is struggling with the promotion of existing validation of non-formal and informal learning system for specific social groups. Cyprus, FYROM and Portugal also feel the need to establish a national mechanism system for monitoring data in the adult learning sector (education and training sector) in order to ensure quality in provision and monitor its effectiveness.

The lack of training and continuous professional development for adult learning staff is also seen as a challenge in Cyprus and Portugal.

¹³ De Vice Minister-President Van De Vlaamse Regering En Vlaams Minister Van Onderwijs: *Conceptnota Aan De Vlaamse Regering*

¹⁴ European Association for the Education of Adults (2011): *Country Report on Adult Education in the Netherlands*

¹⁵ Education for All 2015 National Review Report: Cyprus

¹⁶ European inventory on validation of non-formal and informal learning - Portugal – 2016.

<http://www.cedefop.europa.eu/en/events-and-projects/projects/validation-non-formal-and-informal-learning/european-inventory>



1.5. PARTICIPATION IN ADULT EDUCATION

Existing participation levels

According to Eurostat statistics, in all the partner countries except Sweden and The Netherlands, adult education participation¹⁷ was below the EU average (10,8%) in 2016 with these percentages: Portugal 9,6%, Belgium 7%, Cyprus 6,9%, and FYROM 2,9 %.¹⁸

In Sweden and The Netherlands adult education participation was 29,6 % (Sweden) and 18,8% (the Netherlands) as well as these the two countries discussed in this study where participation in adult education increased since 2011.

Participation in adult education has decreased in Portugal, Belgium, Cyprus and FYROM respectively by 1,9%, 0,4%, 0,9% and 0,7%.

All the countries are aiming to boost the adult participation in the upcoming years as the potential target group for adult education is growing.

Belgium is trying to reach more people including the disadvantaged, to provide a broader offer as well as basic skills training and to increase the quality by creating larger training providers in the adult education sector.

The key focus areas in the Netherlands are literacy and numeracy skills as well as obtaining qualifications with target groups such as people with literacy problems, immigrants who need Dutch language support, elderly, young mothers and long term unemployed.

Sweden and FYROM are also looking to increase the number of people participating in adult education, especially in the vocational education and training.

Portugal has very ambitious goals pursuing to achieve an adult participation rate in lifelong learning activities of 15%, extended to 25% by 2025 while Cyprus is being humble and setting a target of 12% by 2020.

Existing barriers for participating in Adult Education

As mentioned before, despite the money spent on marketing and promotion, reaching and informing target groups about existing adult learning programmes and possibilities is an existing barrier in Belgium, Cyprus, FYROM and the Netherlands.

Financial barriers exist in Belgium, Portugal and Cyprus. While course fees tend to be reasonable and in mentioned countries for vulnerable groups it may be free of charge, we have to take into consideration the materials needed for the courses' costs. Depending on the kind of course the material costs may differ significantly, thus preventing some target groups of participating.

¹⁷ The population aged 25 to 64 participating in education and training

¹⁸ Eurostat statistics 2016, webpage: http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=trng_ifs_01&lang=en



Lack of motivation and interest by the adults has also been a challenge and a barrier preventing adults from participating in adult education in FYROM, Cyprus and Portugal.

As people tend to combine work and family with education activities, the lack of flexibility has also been seen as one of the barriers in Sweden, The Netherlands, Cyprus, FYROM and Portugal.

Belgium experiences some geographical barriers as well. Although adult education is widely spread in the Flemish region not all courses are set up in any centre. Public transport is generally well organized but can cause a serious problem in rural areas and especially in the evenings and the weekends. Insufficient support for people with (learning) disabilities also seems to be one of the barriers in Belgium.

The Netherlands also mention obstacles of age and health as one of the existing barriers.

Portugal also sees politics and policies as one of the barriers existing in the country: there are changes in educational policies each time there is a change of government, especially in the area of adult's education. Moreover adult educational system itself is based essentially on options of temporary programmes, instead of global public educational politics.¹⁹

Existing incentives

Sweden has a relatively generous governmental student loan system (with a student grant) which can be used by the adult learners. There are also some programs for some vulnerable groups to get financial support for adult education in Belgium, Sweden, Cyprus and The Netherlands.

One of the main incentives in Portugal is certification and competences recognition. Since 2000, Portugal has developed the National System for Recognition, Validation and Certification of Competences (RVCC) both academic and professional. There is also dual certification of EFA (Education and Training for Adults) courses, and modular training courses.²⁰

¹⁹ European inventory on validation of non-formal and informal learning - Portugal – 2016.

<http://www.cedefop.europa.eu/en/events-and-projects/projects/validation-non-formal-and-informal-learning/european-inventory>

²⁰ <https://www.qualifica.gov.pt/#/programaQualifica>



2. SKILLS BASE AND QUALIFICATIONS OF ADULTS RE-ENTERING EDUCATION OR TRAINING

In Belgium, to be admitted to formal adult education, a candidate student must meet a number of admission requirements: age conditions and/or necessary certificates. The conditions of admission may vary according to the kind of course. In order to be admitted to primary or secondary adult education, the student does not have to produce any proof of studies. For the higher vocational education (level 5) courses and for the specific teacher training courses, there are specific admission conditions with regard to student certificates formerly obtained. An adult education centre can however apply several kinds of different admission conditions among which an admission test. In all cases, if the student meets the admission requirements he is admitted to the initial module of a programme in the sequentially organised organisation or to any module that is not sequentially arranged.²¹

Sweden also Belgium, has age conditions: people over 20 years old can participate in adult education with the exception of 16 years old to be admitted to Swedish for immigrants programme. However, certificates are not required to study primary or secondary level. In some cases, there are admission tests.

The Netherlands have similar requirements. To study in formal education International Diploma Validation of the official documents is required. When the non-Western migrants cannot provide any documents or certificates they can start an assessment at a regular school (Secondary and High vocational education) or university.

Cyprus and FYROM are the only countries in this study that do not require any formal qualifications (certificates, diplomas, etc.) for people who want to join courses offered by adult education centres. In Cyprus, the courses may be attended by anyone aged 15 and above. However the certificates and diplomas are required to attend university or college programmes in order to obtain the degree.²²

In Portugal, candidates must be over 18 years old to be admitted in adult education. To access basic education levels, the adult does not need to have any school certificate, however, in the remaining levels of education the adults must prove their school qualifications with a certificate. For applications for higher education, adults need to a high school diploma. There is the possibility of entering a higher education course without the 12th year of schooling provided to adults over 23 years old if they undergo a set of tests and stages. Adults wishing to attend professional specialization courses (CET) have to have certain qualifications and certificates/diplomas depending on the kind of course as well as be over 23 years old.

²¹ Decreet betreffende het volwassenenonderwijs, webpage: <http://data-onderwijs.vlaanderen.be/edulex/document.aspx?docid=13914%20#240636>

²² Research voor Beleid (2011): Country report on the action plan on adult learning: Cyprus



3. ANALYSIS OF LABOUR MARKET

3.1. CURRENT LABOUR MARKET SITUATION AND FORECASTS

The biggest unemployment rate between the partner countries is in FYROM (44,2%) followed by Cyprus (10,8%), Portugal (9,1%), Belgium (7,6%), Sweden (6,8%) and the Netherlands (4,8%).^{23 24} FYROM, Cyprus and Portugal are above the EU average (9,1%).

The Belgian employment situation is typically described as the 'citroenmodel' (lemon model), on account of its resemblance to the shape of a lemon, with employment being heavily concentrated in the middle age categories (25-54), while relatively few young people (who usually continue in education for a long time) and older people (who frequently take early retirement) are in work. Studying longer is a positive development, because it considerably increases the chances of finding employment, but early retirement has become unaffordable for the state and it is currently taking steps to discourage it by raising the ages at which people may retire. Belgium's working-age population is projected to grow by about 10 % between now and 2025.

Unlike Belgium, Sweden has relatively low youth unemployment, however, similar to the Netherlands working age population growth is expected to slow down in upcoming years. Even though the working-age population aged between 16-64, according to population forecasts, is expected to grow much less rapidly over the period 2011 to 2025. During upcoming years the substantial number of elderly workers will retire from the labour market. This anticipated growth in retirements will reduce the rate of increase in the working population.²⁵

Cyprus, Portugal and FYROM are not only struggling with relatively high youth unemployment, aging society but the shortage of the job vacancies as well.²⁶

However, in all the countries according to CEDEFOP EU countries' predictions, the unemployment rate is expected to drop in upcoming years and reach its pre-crisis level in 2020.

The unemployment rate is expected to drop in FYROM as well. According to the projects based on the National Program for Economic Reforms and the Fiscal Strategy 2015-2017, as well as other sectoral policies, an average annual growth rate of employees of 2.6% in the period 2015-2020 is expected as a result of the expected investments foreign companies in industrial zones, active measures and programs for employment, facilitated

²³ EUROSTAT news release (2017) webpage: <http://ec.europa.eu/eurostat/documents/2995521/8194186/3-31082017-AP-EN.pdf/31c3bf62-0880-4da8-9cd4-471e60151f94>

²⁴ Republic of Macedonia: State Statistical office webpage: http://www.stat.gov.mk/KlucniIndikator_i_en.aspx

²⁵ OECD country report – Sweden: *Generation shift in the Swedish Labour Market*

²⁶ EUROSTAT STATISTICS (2016) webpage: http://ec.europa.eu/eurostat/statistics-explained/index.php/Job_vacancy_and_unemployment_rates_-_Beveridge_curve



access to finance of companies and realization of capital infrastructure projects. This will result in a reduction in the unemployment rate to 21% in 2020.²⁷

3.2. LABOUR FORCE TRENDS: OCCUPATIONS AND QUALIFICATIONS PROSPECTS

In all partner countries except Cyprus most job opportunities will be for high skilled professionals working in different fields. In Cyprus most job opportunities, around 23%, will be for elementary occupations according to CEDEFOP forecast up to 2025.

Therefore, high skilled labour force is expected to rise and medium skilled labour force to be more or less the same while the number of low skilled labour force is expected to drop.

In Belgium, most job opportunities, around 30%, will be for professionals (high level occupations in science, engineering, healthcare, business and teaching), followed by 16% for clerical support workers and 14% for elementary occupations. In Belgium the proportion of job opportunities for professionals, is significantly higher than the 24% forecast for the EU as a whole. Most job opportunities in Belgium will require high-level qualifications (levels 5 and 6). However, replacement demand will also provide significant numbers of job opportunities requiring medium-level qualifications (levels 3 and 4).

Belgium's labour force will become more highly qualified. By 2025, the share of those with high-level qualifications should rise to 47.5% compared to 40.2% in 2013. People with medium-level qualifications in 2025 will be the same as in 2013, around 40.1% of the labour force. The share with low-level or no qualifications is forecast to fall from 19.7% in 2013 to 12.4% in 2025.²⁸

In Sweden most employment growth is expected to be in non-marketed (mainly public sector) services and most job opportunities (around 31%) will be for professionals. It is important to mention that around 51% of the labour force will have high-level qualifications compared to 38.5% in 2013. By 2025, the share of those with high-level qualifications in labour force should rise to 51.4% compared to 38.5% in 2013. People with medium level qualifications in 2025 will account for 36.1% of the labour force compared to 45% in 2013. The share of those with low-level or no qualifications is forecast to fall from 16.5% in 2013 to 12.5% in 2025.

There will be a shortage of medical personnel in all level of medicine (doctors, nurses, and dentists), teachers, IT-people, Master of Science, social worker, cooks, plumbers, construction workers and lorry drivers. It will be hard to find jobs for photographers, journalists, musicians, janitors, PR-specialists receptionists, store personnel, secretaries and gas station personnel.²⁹

More than one third of all jobs opportunities in the Netherlands between now and 2025 will be for professionals (high level occupations in science, engineering healthcare, business and teaching) followed by

²⁷ FYROM Ministry of Labor and Social Policy (2015): National Employment Strategy 2016-2020

²⁸ CEDEFOP – European Centre for the Development of Vocational Training (2015): *Belgium: Skills forecasts up to 2025*

²⁹ <https://www.arbetsformedlingen.se/Om-oss/Statistik-och-publikationer/Prognoser/Prognoser/Riket/2017-06-28-Prognos-Var-finns-jobben.html>



service and sales workers around 17%, significantly higher than the EU averages of 24% and 16% respectively for these occupations. Shares of job opportunities for plant and machine operators and skilled agriculture workers, both 2% in the Netherlands, are well below the EU averages of 4% and 6% respectively, for these occupational groups.

Most job opportunities overall in the Netherlands will require high-level qualifications (ISCED 97 levels 5 and 6). However, because of high replacement demand, there will be significant proportions of job opportunities requiring medium-level qualifications (ISCED 97 levels 3 and 4).

Although older, the Netherlands' labour force is becoming more highly qualified. This is explained by older less-qualified people leaving and younger more highly-educated people entering the labour market. By 2025, the share of the Netherlands' labour force with high-level qualifications should rise to 45.7% compared to 35.7% in 2013 and 29.9% in 2005. People with medium-level qualifications in 2025 will account for 36.7% of the labour force, compared to 40.5% in 2013. The share of the labour force with low level or no qualifications is forecast to fall from 23.8% in 2013 to 17.6% in 2025.³⁰

In Portugal, most job opportunities, around 26%, will be for skilled agricultural, forestry and fishery workers, much higher than the 6% forecast for the EU as a whole. Most job opportunities for the EU as a whole are forecast for professionals (high level occupations in science, engineering healthcare, business and teaching), around 24%, much higher than the 14% forecast for Portugal. By 2025, the share of Portugal's labour force with high-level qualifications should rise to 33.1% compared to 23.9% in 2013 and 17.6% in 2005. People with medium-level qualifications in 2025 will account for 26.7% of the labour force compared to 21.1% in 2013. The share with low-level or no qualifications is forecast to fall from 55% in 2013 to 40.2% in 2025.

Future employment growth in Cyprus up to 2025 will be in the distribution and transport sector and business and other services, with a small increase in manufacturing. Employment in the primary sector is forecast to continue to fall and to decline in non-marketed services. In Cyprus, most job opportunities, around 23%, will be for elementary occupations, followed by around 22% for professionals (high level occupations in science, engineering healthcare, business and teaching). Job opportunities forecast for elementary occupations (about 23%) are significantly higher than the EU average of 13% for this occupational group.

Most job opportunities in Cyprus will require high-level qualifications (ISCED 97 levels 5 and 6). However, because of replacement demand, overall, most job opportunities will require medium-level qualifications (ISCED 97 levels 3 and 4)

By 2025, the share of the Cyprus labour force with high level qualifications is forecast to rise to around 54% compared to less than 43% in 2013 and 33% in 2005. People with medium-level qualifications in 2025 will account for around 31% of the labour force compared to more than 37% in 2013. The share of the labour force with low-level or no qualifications is forecast to fall from 20% in 2013 to around 14% in 2025.³¹

³⁰ CEDEFOP – European Centre for the Development of Vocational Training (2015): *The Netherlands: Skills forecasts up to 2025*

³¹ CEDEFOP – European Centre for the Development of Vocational Training (2015): *Cyprus: Skills forecasts up to 2025*



In FYROM, according to the Operational Plan of the Employment Agency of the Republic of Macedonia, most job opportunities in the future as well will be for professionals (high level occupations in science, engineering, healthcare) followed by elementary occupations (drivers, maintenance crew, hospitality workers, etc.). Therefore, the jobs with high-level qualifications and people with high-level qualifications is expected to grow, while medium qualification labour force is expected to stay at similar level.³²

3.3. SKILLS NEEDED FOR EMPLOYMENT AND EMPLOYERS

Despite increasing spending on education and training, many countries in Europe are experiencing a skills mismatch between the skills needed in the labour market and those offered by the workforce. This is also for the countries discussed in this desktop paper.

Skills anticipation is a strategic and systematic process through which labour market actors identify and prepare to meet future skills needs, thus helping to avoid potential gaps between skills demand and supply. Skills anticipation enables training providers, young people, policy-makers, employers and workers to make better educational and training choices, and through institutional mechanisms and information resources leads to improved use of skills and human capital development.³³

All the countries mentioned in the desktop study indicated that soft skills (languages, communication, planning, problem solving, etc.) as well as hard skills (financial literacy, IT skills, etc.) will be sought by employers in the future.

Belgium has identified these soft and hard skills needed for the employment and wanted by employers^{34 35 36}:

- **LANGUAGES:** Language skills have become indispensable in the services sector. English has become the official language in the global economy, and Dutch-French bilingualism is often the norm in Belgium.
- **PEOPLE SKILLS AND COMMUNICATION:** Teamwork, networking and a smooth handling with customers and business partners are essential.
- **LEADERSHIP AND COACHING:** Leadership skills are condition a sine qua non for managers, but coaching skills are also appreciated in non-executive positions.
- **ORGANISATION AND PLANNING:** Employees who can organise their day efficiently and work 'smarter' have a foothold. In times of economic difficulty, productive employees are even more in demand.
- **ADAPTABILITY:** It is the gift of developing yourself in every environment and creating added value.

³² Employment Agency of the Republic of Macedonia (2017): *Analysis of the needs of skills on the labour market in The Republic Of Macedonia*

³³ International Labour Office (2015): *Anticipating and matching skills and jobs*

³⁴ EURYCIDÉ (2015): *Adult Education and Training – Belgium (Flemish Community)*

³⁵ De Vice Minister-President Van De Vlaamse Regering En Vlaams Minister Van Onderwijs (2014): *Conceptnota Aan De Vlaamse Regering*

³⁶ Flemish Ministry of Education and Training (2017): *Flemish education in figures 2015-2016*



- FINANCIAL LITERACY: Common sense of accounting, budgeting and general finances are even more important in times of crisis than when things are going well. However, budget guards and financial talent are becoming increasingly scarcer.
- IT: Technological talents have become indispensable for any company. There is an ongoing hunt for IT talent, for example programmers with knowledge of JAVA, NET or C++.
- SALES AND MARKETING: People who can negotiate the best deals are (literally) worth gold for a company. After all, they save their employer a lot of cash.
- RESEARCH & DEVELOPMENT: Major shortages are expected for R&D professionals in companies specialising in technology, consumer goods, industry and life sciences.

Language, communication and leadership skills will be also sought by employers in Sweden, the Netherlands, FYROM, Portugal and Cyprus.^{37 38}

IT skills (JAVA, NET, server administrator etc.), adaptability, sales and marketing will also play a big role in the future employment in FYROM. Management skills, positive attitude and problem solving skills will be also important in FYROM and Portugal.³⁹

Cyprus and The Netherlands also indicated financial literacy as one of the important skills that is and will be needed in the future.

³⁷ Statistics Sweden (2012): *Stor utmaning på framtidens arbetsmarknad*

³⁸ Skills Panorama (2016): *The Netherlands*

³⁹ Araújo, S. (2017): *“Raising skills in Portugal”*, OECD Economics Department Working Papers, No. 1405, OECD Publishing, Paris.