



Lifelong learning - Norwegian experiences

**The role of the social partners in developing
and implementing lifelong learning policies**

The nations of Europe are faced with challenges concerning the needs of both society and individuals for skills, employability and for workforce mobility. Developing a knowledge-based society requires efficient investments as well as the best possible use of existing qualifications and competencies at the individual, enterprise and societal levels.

This is one of three essays that portray and discuss Norway's experiences with developing and implementing a policy on lifelong learning directed towards adults. Norway was a relative pioneer in developing a comprehensive national lifelong learning strategy, which goes under the label the Competence Reform. These reform efforts have been ongoing since the late nineties, with implementation from 2000 onwards.

The three essays focus on different aspects of Norwegian efforts and measures in the area of lifelong learning:

- Essay 1: The role of the social partners in developing and implementing lifelong learning policies
- Essay 2: Validation of non-formal and informal learning
- Essay 3: Qualification and labour market integration of immigrants and refugees.

The aim of these essays is to facilitate European and cross-national learning in line with the principle of open coordination

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The role of the social partners in developing and implementing lifelong learning policies

The social partners have an important role to play in developing and implementing the Lisbon objectives on lifelong learningⁱ. At the European level, the social partners themselves have adopted a framework of actions for the lifelong development of competencies and qualifications, affirming their joint responsibilities at all levels to promote competencies development and emphasising a close cooperation with public authorities and education institutionsⁱⁱ.

While there is a relatively broad consensus that the social partners have a role to play, there is a lack of discussion and analysis of the consequences of different approaches to social partner involvement. The purpose of this paper is to describe and discuss the roles of the social partners, and the interplay between the social partners and the state, in developing and implementing a Norwegian reform of lifelong learning during the period from 1993 to 2004. While in many ways the tripartite concertation undertaken during these years stands out as an exemplary policy development process, the paper does point out a number of challenges for the social partners as well as for public authorities in terms of moving from policy development to policy implementation.

The paper describes how lifelong learning was put on the political agenda through a trade union initiative (in the mid-nineties), how a broad

national reform emerged through a process of dialogue, public policymaking and collective bargaining at the national level (during the late nineties), and the roles the social partners have played during the implementation phase, at the industry and local levels (from 2000 onwards)ⁱⁱⁱ. Finally, these experiences are discussed in the light of European experiences and policy recommendations.

Early nineties: Trade union initiatives brought lifelong learning high on the policy agenda

While adult education and lifelong learning have been an issue among the social partners in Norway since the seventies, it was only during the late eighties and early nineties that the issue came to the front of the political as well as the collective bargaining agendas. The leading force behind this was the Norwegian Confederation of Trade Unions (LO). LO is by far the largest trade union confederation in Norway, organising blue-collar workers in manufacturing as well as employees of the national and local governments. The bulk of its membership is educated at upper secondary level or lower. Against a backdrop of economic recession and rapid changes in the labour market, LO identified further and continuing education for the workforce as one of its prime objectives at its 1993 congress. One of the main arguments was

the danger that new class differences would emerge, as LO saw that many of their members with little or no education were increasingly being excluded from the labour market. Following the congress, LO and its counterpart in the private sector – the Norwegian Confederation of Business and Industry (NHO) – agreed to add a separate chapter in the 1994 Basic Agreement on competence development. (Basic Agreements are negotiated at the national level, and constitute the common part of numerous collective agreements at the industry or sector level. They cover the most general rules for the interaction between employers and employees, such as rights of shop stewards, working hours, information, consultation, participation etc). The new chapter contains a joint declaration stating that “LO and NHO recognise how highly important further education is for the individual, for development of the enterprise, and for the community as a whole”, and establishes further and continuing education as a joint responsibility of the employer and the employee. The chapter further requires employers to ascertain the skills needs of employees on a regular basis, and to initiate training measures as necessary. Finally, employers are made responsible for financing further and continuing education in accordance with company needs. The 1994 Basic Agreement also established the right to leaves of absence for purposes of education that is of value to both the employee and the enterprise. Similar formulations were implemented in the Basic Agreements for the national and local government sectors.

While the Basic Agreement aimed at improving and institutionalising training plans at the enterprise level, LO also had broader aims in improving the opportunities for labour market education, training and learning for adults. On the heels of the congress an action plan for further and continuing education was formulated and was launched in 1995. The plan featured

many of the proposals that were later realised as part of the Competence Reform. One main proposal was for employees to have a statutory right to time off for training and further education. The financing of subsistence during educational leave was to be provided through collective agreements and new funds co-sponsored by employers and the central government. Another important objective was to defend a very successful scheme for the validation of informal learning. The scheme gives workers with five years' of sufficiently varied work experience the opportunity to register for a crafts examination as so-called practice candidates without having to go through the general theoretical exams normally required for registering for this examination. At the time, the future of the scheme was threatened by the education bureaucracy, which wanted a greater emphasis on general subjects in vocational education. The provision of flexible training tailored to the needs of adults and a need to motivate the workforce to participate more in training were also highlighted as important measures in the plan.

Late nineties: Tripartite concertation and policy development

LO's cause gained vital momentum when a parliamentary initiative ordered the Government to report to the Storting, the Norwegian parliament, on a new national policy on lifelong learning. Consequently, a public commission – dominated by representatives of the social partners in all sectors – was set up to survey the field of adult education and lifelong learning and put forward new policy proposals. The commission, which issued its report in October 1997^{iv}, identified the workplace as the most important site for learning, and argued that formal learning in education settings is complementary to, and should build on, informal and non-formal learning in working life.

The employers were especially keen on emphasising informal and work-based learning and were backed up by research that pointed to the crucial role of informal learning for employability and productivity^v. While informal learning had a greater emphasis than in LO's action plan, the commission's main recommendations included a statutory right for employees to study leave, a national system of documentation and recognition of non-formal and informal learning, statutory rights for adults to complete primary and secondary education without fees and a programme of public grants to encourage companies to develop various learning activities. It also emphasised the importance of allowing the social partners to participate in the design of the reform, including the funding issue, through the national bargaining rounds.

Bargaining over lifelong learning

Although there was some mobilisation for lifelong learning demands among LO's affiliates already in 1996, this demand competed with an early retirement scheme, which was also given priority. Nevertheless, the electricians' union went on strike for eight weeks demanding the right to use a certain amount of paid working hours for further education and training. The strike yielded a small improvement in the collective agreement in this respect, but not the kind of right that the electricians had aimed for. From 1998 to 2000, lifelong learning was given a high priority in the national bargaining rounds. Each round made some contributions to the development of a concerted policy reform, while some issues were also left unresolved:

As part of the *1998 collective agreement* a joint action plan on competence and lifelong learning was agreed upon by LO and NHO. The importance of evening out and preventing differences in access to learning was emphasised. The action plan adopted most of the proposals put forward by the public commission, including the

principle of a statutory right to study leave, and called on the government to continue the practice-candidate scheme. The plan also detailed how study leave should be implemented, and stated that employers, employees and the authorities should all contribute to the financing of study leave, through the collective agreements and contributions from the central government. LO's contribution included the maintenance of a policy of moderate wage demands^{vi}.

A little later that spring, the government delivered a White Paper called *The Competence Reform*^{vii}, which endorsed most of the proposals from the public commission and the LO-NHO joint action plan. The White Paper also stressed the need to construct a national system for validating informal and non-formal learning, which the social partners had agreed upon in their joint action plan. Following this, the Competence Reform was approved by the Storting in January 1999.

The *1999 bargaining round* was preceded by a new public committee made up exclusively of the social partners, which discussed the implementation of the Competence Reform. Although a number of different models for financing educational leave were put forward, the parties did not agree on this issue^{viii}. LO again agreed to put forward moderate wage demands, in return for a gradual implementation of the Competence Reform. Responding to a direct demand from the negotiating partners, the government promised to invest NOK 400 million in a Competence Development Program, governed by the social partners, to support enhanced cooperation between enterprises and various learning providers.

In the *2000 bargaining round* LO, on top of a moderate wage claim, put forward demands for employers to contribute to the financing of subsistence during educational leave. The parties

did not agree on this, and the proposed agreement from the LO leadership was later turned down in a ballot of LO members. In the new agreement, higher wages and more holidays were given preference by the members. The negotiations showed quite clearly that the LO leadership did not have grassroots support for exchanging wages for paid educational leave. Only a minority of the unions within LO wanted to give preference to this right. The parties, including the government, did agree, however, that the issue of financing should be deliberated further.

Following correspondence between the prime minister and the chief mediator in the central bargaining round in 2000, a new government commission – again dominated by representatives of the social partners – was set up to prepare models for the funding of subsistence costs. In its report^{ix}, the commission did not propose major changes in funding, except for a new support and loan measure in the State Educational Loan Fund for adults who use their statutory rights to complete primary or upper secondary education. The commission also refers to the individual employer's responsibility for skills development and to existing agreements at the enterprise and industry level. In their dissent included in the report, the employee representatives from LO and YS (the Confederation of Vocational Unions, the second largest trade union federation) express the view that the conclusions of the report constitute a breach of the premises underlying the agreement in the bargaining round of 2000. They argue that it requires political action, and refuse to return the issue to future bargaining rounds. This initiative was followed up by the Storting in June 2004, which asked the minister of education to develop a funding scheme that targeted non-traditional learners.

In addition to the public commissions and collective bargaining processes, a number of bipartite and tripartite forums and networks were set up to develop and implement the Competence Reform. A high-level Forum for Competence Building, led by the minister of education, and comprising representatives of the social partners and education providers was appointed in 1999, and a reference group for the Competence Reform made up of specialists from the same member organisations has met monthly to coordinate the implementation of the reform. These groups formulated an action plan for the Competence Reform for 2000-2003, and the Ministry of Education took on the responsibility for implementation. LO and NHO set up their own joint secretariat to implement the reform within their own area. An informal network embracing other employers' organisations and unions was also set up to coordinate efforts.

The social partners, via their positions on the board, strongly influenced the content and priorities of the *Realkompetanse* project that was set up to develop a national system for validating non-formal and informal learning. From the start the project's mandate was geared towards validation through the educational system, for those who wanted to enrol in educational institutions. The social partners used their influence to extend the mandate to the development of validation tools for working life, directed at skills development and human resource management in enterprises and mobility in the labour market, and targeting even employees that do not intend to enrol in formal education programmes.

While the financing issue remained unresolved, this interaction between the social partners and the public authorities resulted in a framework of statutory rights, arrangements and development programs: First, statutory rights for adults

to primary education (effective from autumn 2002) and upper secondary education (effective from autumn 2000) have been introduced. Second, a statutory right for study leave for up to three years has been integrated into the Work Environment Act (from 2001). Third, tax regulations have been changed to exempt employees from paying income tax on most employer-paid education. Also student loans have become more readily available for adults who work part-time. Fourth, an amendment of the Act relating to Universities and Colleges obliges universities and colleges to assess adult applicants who apply on the basis of documented non-formal learning (from 2001). Similar rights have been provided at the upper secondary level, and all counties have established centres for validating informal learning. Finally the Competence Development Programme that emanated from the 1999 bargaining round has supported some 650 local projects all over the country to develop education and training programmes that are tailored to the needs of companies and employees. The programme is built on a partnership philosophy. It has a board of executives consisting of representatives of all the main trade unions and employer federations. In order to receive support from the programme, applicants have to demonstrate a partnership agreement between the employers and employees, as well as between enterprises and providers of education and training.

The type of interaction referred to above is part of a broader Norwegian model of policy formation. The Norwegian system of labour relations is marked by a high degree of centralisation, on the labour as well as the employer side. This centralised system of collective bargaining enables the social partners to act in concert with the government, and the government is often drawn explicitly into the bargaining process through joint demands from the social partners. There is also a strong tradition for governments

to involve the social partners in public commissions and other types of policy formulation efforts and in social and legislative reforms. Even in this context, however, the cooperation between the social partners, and between the social partners and the public authorities in policy formation can be characterised as extraordinary close, and the influence of the social partners is strong.

From 2000 onwards: Weak involvement of the social partners at the industry and local levels during implementation

While the social partners at the national level have been active in negotiating and collaborating with the government to develop improved framework conditions for lifelong learning, these endeavours do not appear to be replicated fully at the local level. Neither the chapters on skills development in the Basic Agreements nor the improved set of rights and opportunities seem so far to have had a great impact on the training practices of private and public enterprises. While evidence for such a conclusion is still patchy, there are many indications pointing in this direction:

- Statistics from the labour force survey show that participation rates in education and training has been falling slightly during the period from 1996 to 2002^x.
- According to various surveys, 50-60% of companies^{xi}, covering less than 60% of all employees, carry out systematic evaluations of the employees' competence needs^{xii}. In industries with many low-skilled employees, even fewer employers carry do this.
- The Eurobarometer survey on lifelong learning indicates that the interest in lifelong learning is comparatively low in Norway
- Four years after the new chapter on skills development was introduced in the private sector Basic Agreement, there was a strong

feeling among the social partners that the agreement was ineffectual. A bipartite working group was organised to encourage more widespread use of the chapter. The main suggestion from the working group was to develop a new tool for validating informal learning in working life (as opposed to schemes directed towards validation through the educational system)^{xiii}.

- The social partners LO and NHO and their affiliates in the engineering industry put a lot of energy into a bipartite project which developed a competence passport for this purpose (as part of the *Realkompetanse* project), but the tool has yet to become widespread. While the union disseminated information about this new tool among all its local shop stewards, this did nothing to create general pressure from below to apply this tool in companies. The employers' federation in manufacturing has likewise been marketing the tool, but the demand for it is scarce^{xiv}.
- Case studies of the Norwegian shipbuilding industry^{xv} demonstrate how local unions, even in a situation marked by years of crisis and downsizing in the shipyards, fail to develop an active learning strategy to increase their members' employability. Training is seen as the employers' responsibility, and employers have difficulties engaging union representatives to take an active part in bipartite training committees. Motivation for training is low among employees, and the unions are not particularly active in trying to encourage motivation.
- When in spring 2003 LO surveyed the activities related to the Competence Reform undertaken by its union affiliates and local offices, the results were disappointing. The report concludes that there is a lack of motivation and knowledge amongst the local representatives. Lack of agreement on the financing issue contribu-

ted in a negative way to this result^{xvi}.

- Several reports also conclude that county governments do not allocate sufficient resources to providing adults with upper secondary education tailored to their needs^{xvii}.
- Evaluations of various social-partner-driven programmes and funding arrangements suggest that employers are the driving force for organised learning at the local level, and that local trade union representatives are not very proactive in this policy domain. One example is the evaluation of a funding arrangement for training in the central government sector, which is based in the collective agreement. The evaluation showed that local unions often played a passive role in the development and implementation of new training programmes sponsored by the fund^{xviii}.
- An evaluation of the Competence Development Programme showed that while the program had indeed been successful in reaching out to 50,000 employees with and effective training tailored to the local needs, the local unions were often rather passive partners. Only one in five projects inspired union representatives to become more engaged in training issues^{xix}. Case studies done by the program evaluators showed that while local union representatives did sign project proposals as required, many did not contribute actively in terms of shaping and defining the contents of the training program.

The evaluation of the Competence Development Programme further points out how the social partners have gradually lost momentum in their efforts to implement the programme and the reform. This particularly applies to the unions organising blue-collar workers and workers in the service industries. The joint secretariat of LO and NHO was closed down in 2002, and many

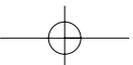
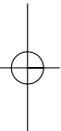
of LO union affiliates are not actively engaged in utilising and spreading the good results from the programme. To some extent, lifelong learning has been displaced at the top of the social partner agenda by other issues such as pension schemes and debates over labour market regulations. Funding for the Competence Development Programme has also been gradually cut back.

Norwegian experience and European policies

Member states of the EU are encouraged to develop comprehensive and coherent strategies in the area of lifelong learning. As described above, initiatives from, and the involvement of, the social partners in the national policy formation process have indeed contributed significantly towards this goal in Norway. The firm commitment of the social partners has brought about a stronger focus on learning at the workplace and has been essential in developing an understanding within the educational bureaucracy and the educational system that learning is “lifewide”, and that the validation of informal learning should play an essential role in a policy for lifelong learning. Furthermore, the social partners have been instrumental in ensuring that the validation of non-formal and informal learning should target employees that seek to increase their employability or skills without having to enrol in formal education.

Centralised bargaining with contributions from the authorities within a broader framework of trading higher wages for improved framework conditions for LLL has been helpful in producing concerted action on issues such as the building of a national system for the validation of prior learning and the development of models and infrastructures to deliver tailored training and education at the workplace (The Competence Development Programme). While the bargaining

rounds did not produce agreements on the financing of subsistence during educational leave, a parliamentary-based solution may be under way. The Norwegian model of tripartite concertation in developing an LLL policy thus appears to have yielded some favourable results concerning national framework conditions for LLL. The social partners at the European level themselves emphasise their responsibilities at all levels. The Norwegian experience indicates that a keen interest in learning among the social partners at the national and sectoral levels is not necessarily replicated at the industry and local levels. This is particularly true for the unions and employers' organisations in industries with a high proportion of low-skilled employees. For the unions in particular, the challenge appears to be that their local representatives and apparatus lack the competence, impetus and infrastructure to motivate and guide their members to participate in LLL. Recent reviews of trade unions' LLL policies suggest that this problem applies to unions in many other countries as well^x. In this issue, the Norwegian experience points more towards a general problem than towards a solution. In other countries, most notably the UK, unions have developed local union learning representatives to confront this problem. The union learning representatives motivate, aid and support members in participating in learning, work in partnership with management, establish workplace learning centres and broker the provision with local education institutions and so on^{xxi}. The UK's statutory backing of union learning representatives indicates that public authorities may have a role to play in empowering unions to become better partners for learning at the local level. In countries such as Germany, local and regional agreements on learning provide a different route towards social partner involvement at these levels. In the further work to implement the Competence Reform in Norway, the social partners and the authorities may learn from these developments.



- i Investing efficiently in education and training: An imperative for Europe. Communication from the European Commission, COM(2002) 779 final
- ii ETUC/UNICE/CEEP/UEAPME Framework of actions for the lifelong development of competencies and qualifications
- iii The historical section draws heavily on results from the Learnpartner project, which is funded by the EU under the Key Action Socio-Economic Research aspect of the Framework Five Programme (Contract no: HPSE-CT2001-00049). <http://www.leeds.ac.uk/learning-in-partnership/>. Particularly we draw on Skule S, Stuart M, Nyen T (2002) Training and development in Norway, *International Journal of Training and Development*, vol. 6 no 4, pp 263-276
- iv NOU 1997:25 Ny kompetanse (Buer-utvalget)
- v e.g. Larsen, K.A., Longva, F., Pape, A., Reichborn A.N. (1997) *Bedriften som lærested*. Fafo-rapport 212. Oslo:Fafo, and Reichborn A.N., Pape A., Kleven K. (1998) *Papir på egen dyktighet*. Dokumentasjon av realkompetanse fra arbeidslivet. Fafo-rapport 245, Oslo:Fafo.
- vi The maintenance of moderate wage demands was a continuation of the "Solidarity Alternative", a social pact to combat unemployment, which was agreed in 1992 between the Labour Government and the main organisations representing capital and labour. The pact involved "solidaristic wage moderation" by the unions to improve cost competitiveness, active labour market policies to reduce unemployment and enhance skills, and macroeconomic policies to stabilise the growth in demand, achieve a stable exchange rate and control inflation. The pact was used by the unions to preserve welfare schemes (Dølvik, J.E. and Stokke, T. (1998) *Norway: The revival of centralised concertation*. In Ferner, Anthony and Hyman, Richard (eds.) *Changing industrial relations in Europe*, Blackwell Publishers.).
- vii Report no. 42 to the Storting, 1997-98
- viii NOU 1999:14 *Forberedelse av inntekstoppgjørene 1999*
- ix NOU 2001:25 *Støtte til livsopphold ved utdanningspersmisjon*
- x www.ssb.no/akukurs
- xi The surveys are the second continuing vocational training study, and Nordhaug O, Døving E, Nordhaug I W (2004) *Kompetanse i norske bedrifter*, Søkelys på arbeidsmarkedet (forthcoming)
- xii Nyen T, Hagen A, Skule S (2004) *Lifelong learning in Norwegian Working Life: Results from the Learning Conditions Monitor 2003*. Fafo-report 443, Oslo: Fafo
- xiii LO-NHO Innstilling fra arbeidsgruppen som har vurdert tiltak for å motivere og stryke arbeidet med Hovedavtalens kap. 16.
- xiv Skule (2004) *Realkompetence i norsk industri: En ny bro mellom arbeidsliv og utdanning?* i P. Bottrup, C.H. Jørgensen: *Læring i et spændingsfelt – mellem uddannelse og arbejde*, Roskilde Universitetsforlag 2004.
- xv Svensson L., Randle H., Stuart M. (2004) *Towards the learning organisation. Learning in partnership and the management of change*. Leeds university.
- xvii Engesbak, H *m.fl.* (2004) *...men hvor skal vi henvende oss*. Voksnes rett til grunnskole og videregående opplæring. Oslo: VOX
- xviii Statskonsult (2002) *Evaluering av ordningen med tildeiling av kompetansmidler over hovedtariffavtalen i staten*. Evalueringsrapport, Oslo:Statskonsult
- xix Døving E, Ure, O.B., Teige, B., Skule S: *Evaluering av kompetanseutviklingsprogrammet Undereisrapport 2003*. (Evaluation of the Norwegian Competence Development Programme). Fafo-notat 2003:26, Oslo: Fafo
- xx Vind, A., Le deist F. D., Heidemann W., Winterton J. (2004) *European Trade Unions Strategies on Lifelong Learning*, Varenr. 4234, The Danish Confederation of Trade Unions.
- xxi Winterton J (2004) *United Kingdom*. In Vind (op.cit.)

