



Adult learning statistical synthesis report

A synthesis report drawing on statistical data relating to participation in, and the financing of adult learning in the European Member States

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1 INTRODUCTION

This report presents a synthesis of country level statistical reports which outline and analyse data relating to adult learning participation, providers and financing in Europe's Member States. The aim of this report is to present an overview and summary of 28 country reports, in order to highlight the picture across European Member States with regard to adult learning participation and financing in particular, but also adult learning providers. The country level reports, produced with the input of independent country experts in the field of adult learning, are available separately.

The synthesis report is broken down into three main sections; adult learning participation, adult learning providers and the financing of adult learning, and it aims to provide an overarching synthesis of the picture across the EU, drawing on the review of country level statistical reports.

The statistical reports contain data drawn from the European Adult Education Survey (AES), the European Continuing Vocational Training Survey (CVTS) and the European Union Labour Force Survey (EU LFS), the Unesco-OECD-Eurostat (UOE) data collection on education systems as well as DG EMPL database on labour market policies (LMP). Methodological considerations will be outlined in section 1.4.

1.2 The network of independent experts in Adult Learning

Ecorys, on behalf of the European Commission's Directorate General for Employment, Social Affairs and Inclusion (DG EMPL), has managed and facilitated a European network of experts of adult learning/skills and adult education policy since 2016. This pool of independent experts supports DG EMPL by providing updates on national level policy in the field of adult learning. The role of the expert within the network is to provide insights on the adult learning agenda in their country – providing updates on policy, practice and issues of public debate in adult learning and skills. The in-country experts, each have a strong track record of experience within the sector with the network combining those with track record of working across government, policy making, programme implementation and education provision. The experts report chiefly by way of short status reports on the circumstances in their own Member State, although also produce more in-depth deliverables, which focus on a particular area of interest (such as the Statistical Reports that this Synthesis Report draws from).

It should be noted that the country reports were produced across 2019, at which point the network of independent experts in Adult Learning also included input from a UK expert. As such, a country report for the UK was produced, and the data extracted for the production of country reports (and which has informed this Synthesis Report) included, in many cases an average position for EU28. Reflecting the period across which the research was undertaken, reference to the European Member States and EU28 across the course of this report is inclusive of the UK.

1.3 Country level statistical reports

A set of statistical reports have been produced with the input of experts from DG EMPL's Adult Learning expert network. A statistical report has been compiled for each European Member State. These reports present data on adult learning participation, providers and financing for respective Member States, with associated analysis and interpretation from the country experts.

Below we set out the process through which the Statistical Reports were developed.

The Ecorys research team, liaising and agreeing with DG EMPL, went through a process of identifying relevant data sets to include in the Statistical Reports. This process began with a review of the data made available from the EU Continuing Vocational Training Survey (CVTS), the EU Adult Education Survey (AES), the EU Labour Force Survey (LFS) the UOE data collection and DG EMPL labour market policy (LMP) database. Once a 'long-list' of relevant data was determined, the research team and DG EMPL went through the process of streamlining and selecting priority fields of data to work with. This prioritisation process involved the selection of data sets that could usefully be interpreted and analysed by experts, bearing in mind a need to avoid overlap and duplication. A number of data sets were also discounted on the basis that there were some risks flagged or present in terms of reliability. Once a short list of data was agreed, the extracted data was compiled and checked.

Based on the selected data fields, the team from Ecorys, with input from DG EMPL, designed a template for the reports in order to provide a consistent framework for reporting. The relevant national data sets were then transposed into the templates. This pre-filling of templates ensured that data could be checked and replicated where appropriate.

Where available, the most recent national level data was presented, along with the average for the EU Member States (EU28), and time series data was presented in a number of cases.

Guidance to experts around how to interpret and analyse the data was presented, in order to ensure that the reports follow a common framework and approach.

Experts then prepared their reports during late 2019/ early 2020, by providing interpretation of what the data showed in terms of adult learning in their country but also analysis of the data in terms of explanatory and contextual factors, and comparison with the EU average data where relevant.

1.4 Methodological approach for the Synthesis Report

This Synthesis Report aims to offer an overview of adult learning participation, providers and finance across Europe, on the basis of selected data from EU surveys. The approach has been one of inductive analysis. For each data set reported in the country reports, the country report content has been systematically reviewed and compared. This has enabled an overall narrative overview for the EU28 to be built up. Selected examples are presented in the Synthesis Report, drawing from the country reports, and demonstrating variations and commonalities between the Member States. Whilst countries have invariably been 'compared' through consideration against an average position, the Synthesis Report has been keen to avoid generating a cross-comparative assessment of countries by way of a ranked positioning, or formal analytical framework for comparison that places some

Member States perform more favourably in relation to particular metrics. Instead, this overview report seeks to highlight the story that the data is telling us in terms of variation in adult learning performance, providers and finance across the Member States, and to explore explanations and context as to why that variation exists. The resulting Synthesis Report thus outlines the state of play in various aspects of Adult Learning across Europe, and draws on examples and interpretation offered by country experts in order to demonstrate the rich variation of experience, but also some common challenges and trends that exist in the field.

1.5 Methodological Limitations

The country level statistical reports offer a rich evidence base in that they provide expert insights on recent and previously unreported adult learning data, drawing on thematic expertise and national level knowledge and experience. It must be appreciated, however, that the analysis and explanations offered by experts do not represent an official position of national Governments. Whilst experts report on data drawn from common sources, it should be noted that their interpretation and understanding of the context behind the data will reflect their own personal experience, as well as the level and type of information in the public realm or made available to them.

1.6 Evidence Base and Data Sources

All data cited in this report is provided in its raw form in an annex (see annex 2). The source for each data set is referenced within the main body of the report. Below is an overview of the main data sources used in the development of the country reports.

[Continuing Vocational Training Survey \(CVTS\)](#): data from this source is drawn from a survey which provides statistical information on continuing vocational training in enterprises. The data set forms part of the EU's statistics on lifelong learning. Amongst other issues, the survey provides data in relation to continuing vocational training, skills supply and demand, training needs, the costs of continuing training, and enterprises own training resources and use of external providers for training. The most recent CVTS was carried out for the reference year 2015. The data is collected once in every five years, with previous data collections available for 1993 (as a pilot survey), 1999, 2005 and 2010.

[Adult Education Survey \(AES\)](#): the survey concerns adults' participation in education and training (formal, non-formal and informal learning) and covers the resident population aged 25-64. The AES collects data across different features of participation in formal education, non-formal education and training and informal learning. It also concerns employer financing and costs of learning, types of learning activities and obstacles to participation. The reference period for the survey is the 12 months preceding the interview.

The most recent Adult Education Survey was carried out in 2016¹. Previously, the data was collected for 2007 (as a pilot survey) and for 2011; in the future the data will be collected once in every six years.

[European Union Labour Force Survey \(EU LFS\)](#): the survey provides data on labour market participation of people over the age of 15, as well as those outside of the labour force, covering all industries and occupations. The survey is a large household sample survey (conducted with 1.5 million individuals across Europe) undertaken by national statistical institutes, with data then processed by Eurostat. The data is provided on a quarterly basis with also access to micro-data available for research purposes.

[Unesco-OECD-Eurostat \(UOE\) joint collection of education data](#): the objective of the UOE data collection on education statistics is to provide internationally comparable data (mostly at national level, with some insights at the subnational level) on key aspects of formal education systems, specifically on the participation and completion of education programmes, as well as the cost and type of resources dedicated to education. The data is provided on an annual basis as of late 1990s.

[DG EMPL labour market policies \(LMP\) database](#): LMP database provides statistics on the provision of active labour market policies in the EU. The scope of LMP statistics is limited to public interventions which are explicitly targeted at groups of persons with difficulties in the labour market: the unemployed, persons employed but at risk of involuntary job loss and inactive persons who would like to enter the labour market. Data on public expenditure and participants (stock and flows) are collected annually from administrative sources. The data is provided on an annual basis as of later 1990s.

The data included in this report has been accessed via Eurostat, and has included access to the online database, scientific use files (EU_LFS) and tailor-made data extraction provided by Eurostat on request.

2 ADULT PARTICIPATION IN LEARNING

This section reviews data on adult participation in learning and presents data across a number of fields against the EU average (where available).

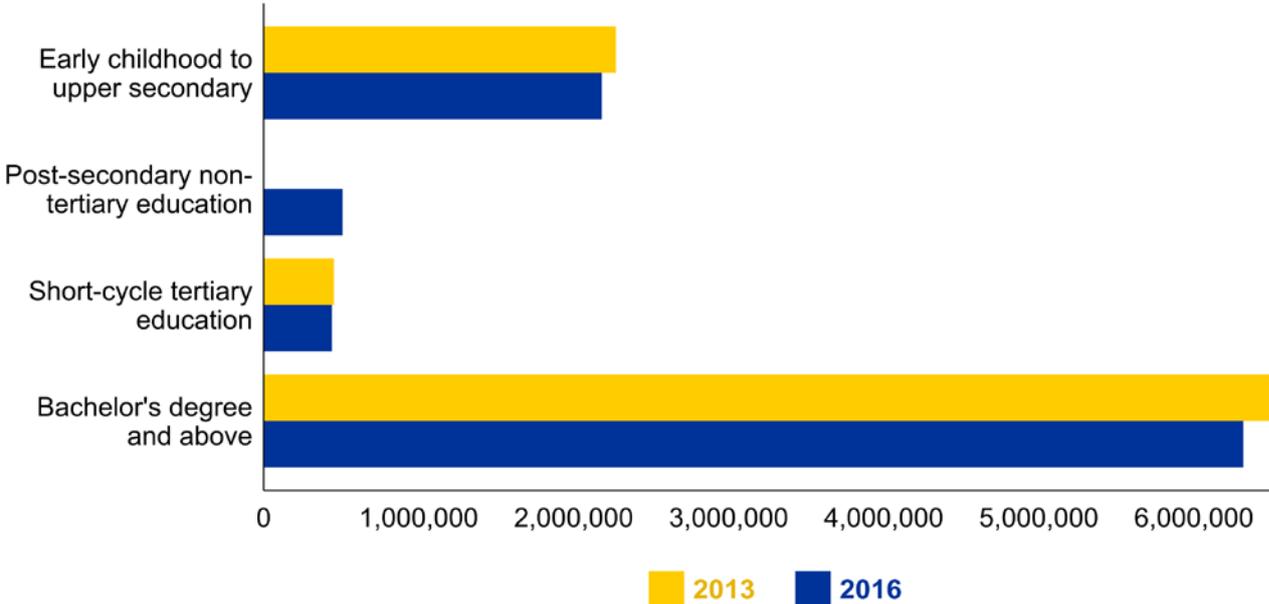
2.1 Adults' participation in formal education

Figure 1 below shows the number of adults aged **25 to 64** enrolled in formal education, distributed by the level of education that the participants are undertaking. Participation

¹ Data collection at Member States level for the AES has so far been carried out in three waves: between 2005-8 for the 2007 AES, between 2011-12 for the 2011 AES and between 2016-17 for the 2016 AES. The next data collection will be 2022-23.

numbers, in addition to (often low) rates of the participation of overall population, are provided to aid interpretation. Between 2013 and 2016, participation of adults aged 25 to 64 in formal education has seen a slight decrease of 3.1% overall in the European Union (EU28). This is true regarding participation in three of the analysed levels of education: up to upper secondary education (ISCED level 0 to 3), post-secondary non-tertiary (ISCED 4), short-cycle tertiary education (ISCED 5) and bachelor's degree and above (ISCED 6 to 8). Data for participation in post-secondary non-tertiary education are not available for the year 2013, thus making it impossible to identify a trend.

Figure 1: Number of 25-64 year olds' enrolled in formal education and training programmes by the level of educational programme, EU 28 (2013 and 2016)



Source: Eurostat, UOE data collection, online data table: [[educ_uoe_enra02](#)]

Overall, the highest levels of participation across the European Union EU28 are to be found in bachelor's degree and above (6,318,276 in 2016) and up to upper secondary education (2,180,186 in 2016). However, the latter is also the level that has suffered the most substantial decrease over the period analysed (participation decreased by 4.1%). Bachelor's degree level and above and short-cycle tertiary education equally saw a 2.7% decrease between 2013 and 2016. Although it is not comparable over time, it can be observed that post-secondary non-tertiary education registered 508,599 participations across Member States in 2016, approximately 13% more than short-cycle tertiary education in the same year.

On average, participation in formal education in Europe decreased slightly from 2013 to 2016, but trends vary greatly among Member States, and both increases and decreases are identified (for more detail on adults' participation in formal education see Annex 2). The experts provided several explanatory factors for these trends, ranging from policy measures adopted between the two analysed years, to changes in the socio-economic landscape of their Member States. Among the main determinants are the 2008 economic crisis and migratory flows, which have both had considerable impacts on adult education participation over the analysed time period. As both of these explanatory factors were

highlighted by experts in the country reports, we offer them some additional attention here.

While many Member States experienced a period of economic growth between 2013 and 2016 following an initial decline, the effects of the economic crisis were still very evident in 2013.

The country reports indicated that the major impacts of the economic crisis on the participation of adults in formal education were:

- Raising the bar in terms of skills needed to access the labour market and increasing the need for adults to obtain a formal educational qualification in order to find employment. The crisis prompted many adults to re-train and/or further their education by enrolling in some type of formal education;
- Prompting governments around Europe to adopt policy measures aimed at encouraging or enabling adults to re-train and/or further their education in order to improve their ability to access the labour market.

These two tendencies, which have emerged consistently across the country level reports, have had different impacts on participation numbers during the two time periods analysed. Following the crisis, governments were prompted by the rising levels of unemployment and the shrinking opportunities to access labour market, to adopt policy measures to support unemployed adults through re-skilling and improving access to adult education. Generally, in countries where governments have been fast in responding to the crisis by reinforcing the adult education system and where the economy has recovered relatively quickly, participation of adults in formal (as well as non-formal) education was higher in 2013 than in 2016, signifying a healthier labour market. In others, where for several reasons the economy has been slower to recover, and where austerity measures have hampered governments' investments in education, participation in adult education was generally higher in 2016.

Examples reported by the adult learning network experts include the Economic Adjustment Programme (May 2013–March 2016) in Cyprus which aimed at upskilling and/or re-skilling the unemployed population. Another example is offered by the reform of Vocational and Educational Training (VET) in Lithuania, where the government invested in new facilities and in expanding the training offer, causing participation in post-secondary non-tertiary education to have a 104% surge in two years. However, experts also reported examples where educational reforms had a negative impact on adult participation in formal education, such as the examples reported by the Hungarian expert, where a set of higher educational reforms in 2013 had the effect of shrinking access to part-time and distance learning in bachelor's programmes, *de facto* raising a barrier to access for employed adults.

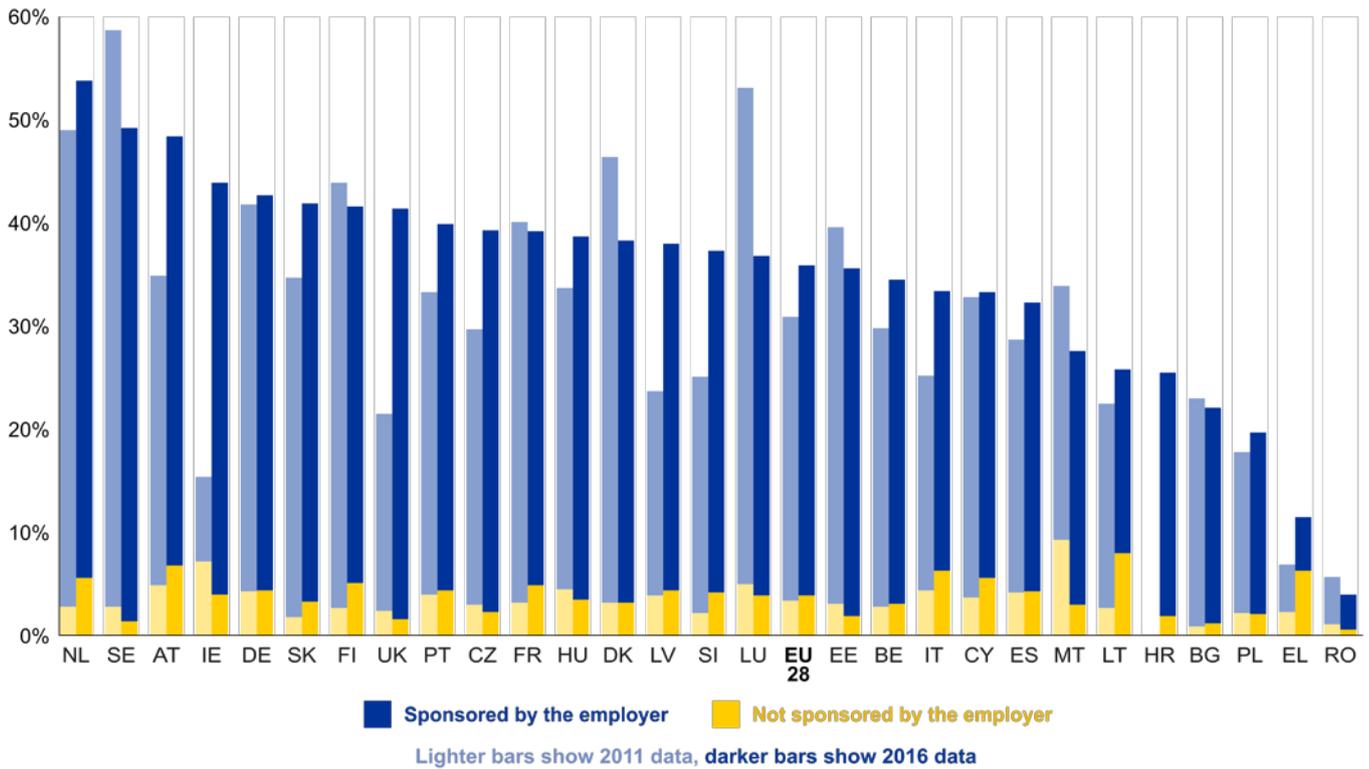
Additionally, migratory flows to and from Member States meant that, on the one hand in some Member States (such as Germany, Italy and Sweden) the influx of low-skilled/low-qualified migrants – which surged between 2013 and 2016 – brought about an influx of participants in lower level educational programmes up to upper secondary education level; on the other hand, however, other Member States (such as Bulgaria) have mentioned emigration as a reason for the decrease of participation of adults aged 25 to 64 in higher levels of education, such as short-cycle tertiary education, bachelor's degree and above.

It should be noted that some experts pointed to methodological or data issues which they believed had influenced the presented data. For example, in France, Germany, Italy and Spain, students aged 25 are in many cases still enrolled in formal education, but in their initial cycle of education (e.g. doing a MA or a long BA), therefore distorting the numbers of adult participation. Overall, the participation of adults in formal education (up to upper secondary education, short-cycle tertiary education and bachelor's degree and above) in the EU has decreased slightly from 2013 to 2016. However, due to changes in the socio-economic landscape in Member States, the 2008 economic crisis and migratory flows, trends in participation vary greatly across the Member States. These on one hand influenced the composition and size of the target population of adults seeking to participate in learning and on the other elicited governments to enact policy responses in one way or another.

2.2 Adults' participation in non-formal job-related education and training

Figure 2 details the participation rates of adults in non-formal job-related training. Rates for the Member States and the EU average are provided for all job-related training and are also disaggregated by job-related training sponsored/not sponsored by the employer. In 2011, the overall participation rate of adults in non-formal job-related training was 30.9%, and in 2016, 35.8%. It is important to note that owing to a change in the questionnaire in 2016, the participations rates between years are not directly comparable. This is broken down by the participation rate in non-formal job-related activities sponsored and not sponsored by employers. The vast majority of job-related non-formal education and training activities are sponsored by their employers: in 2016 the rate of adults in the EU28 participating in non-formal job-related activities sponsored by the employer was 32%, while in the same year the participation rate in non-formal job-related activities not sponsored by employers was 3.9%. However, both figures increased significantly (respectively by 16.4% and 14.7%) over the examined time period (2011-2016).

Figure 2: Participation rate in non-formal job-related training (2011 and 2016)



Source: Eurostat, EU Adult Education Survey, online data table: [\[trng_aes_122\]](#). Note: a learning activity is considered employer sponsored if one or both of these two criteria are true – (i) it took place fully or in part during working hours and/or (ii) it was paid-for in part or in full by the employer. There was a break in time series in IE, LU, SE and UK.

These trends are reflected in most Member States, where it is possible to observe that a majority of countries in Europe between 2011 and 2016 have seen significant increases in the participation of adults in job-related non-formal education and training activities. In almost all of these countries, non-formal job-related education and training sponsored by employers is the predominant form of job-related non-formal learning, while the number of learning activities not sponsored by employers (similar to the EU28 average discussed above) tends to be much smaller.

The largest increases in participation in non-formal job-related training were registered in Ireland and the United Kingdom (+189% for Ireland and +91.2% for the UK in 2016 compared to 2011), also marked by a distinct decrease in activities not sponsored by employers (-44.4% and -33.3% respectively) and a surge in activities sponsored by employers, particularly in Ireland, where the increase in non-formal job-related education and training sponsored by the employer raised from 8.2% in 2011 to 39.9% in 2016 (a 386.6% surge). However, part of these changes in Ireland, United Kingdom but also Sweden and Luxembourg may be attributed to changes in the methodology.

A number of experts cited economic expansion after the crisis as a possible explanatory factor for the increased willingness of employers to provide training to their employees. This is the case for Ireland, Hungary, Czechia – and to some extent Spain – with the picture of an expanding and dynamic labour market with new skills needs, and with employers

who, in many cases, take it upon themselves to provide re-skilling and upskilling for their existing employees, or are more willing to hire less skilled staff and provide training. The Belgian expert also mentioned improved government measures to compensate employers for the time employees take off for training, which has led to an overall increase in participation in non-formal job-related education, with employers more willing to sponsor their employees' training or to grant time off for participation in external training.

In a few Member States, the participation of adults in non-formal job-related activities not sponsored by the employer increased. These were mostly related to the increase of government or other funding (the Lithuanian expert mentions the role of the European Structural Funds) for non-formal job-related activities, which took the burden off employers. For example, the Cypriot expert points to the consequences of the 2008 crisis and of the austerity measures that followed, leading the government to subsidise non-formal job-related training for adults (mainly out of work) and often leaving employers unable to afford financing their employees' training. In France, the "500,000 Additional Training" plan launched in 2015 led to an increase in participation in non-formal job-related education activities sponsored by the State, aimed mainly at young unemployed adults. The plan is not targeted to a specific age bracket, but according to a 2017 evaluation report its main beneficiaries have been adults aged 26+².

The overall decrease in participation in job-related non-formal education and training in Malta and Sweden is due to the simultaneous increase in the offer of formal education for adults. For example, in Sweden increased government funding of formal education for adults was provided. In Malta the Referencing Report has allowed training providers to obtain a licence and release official qualifications, *de facto* becoming formal education providers. The Referencing Report allows training providers, even large companies, to obtain a licence as a training provider as well as accredit their short courses. This means that short courses can now lead to formal certification in terms of level on the Malta Qualifications Framework as well as number of credits gained.

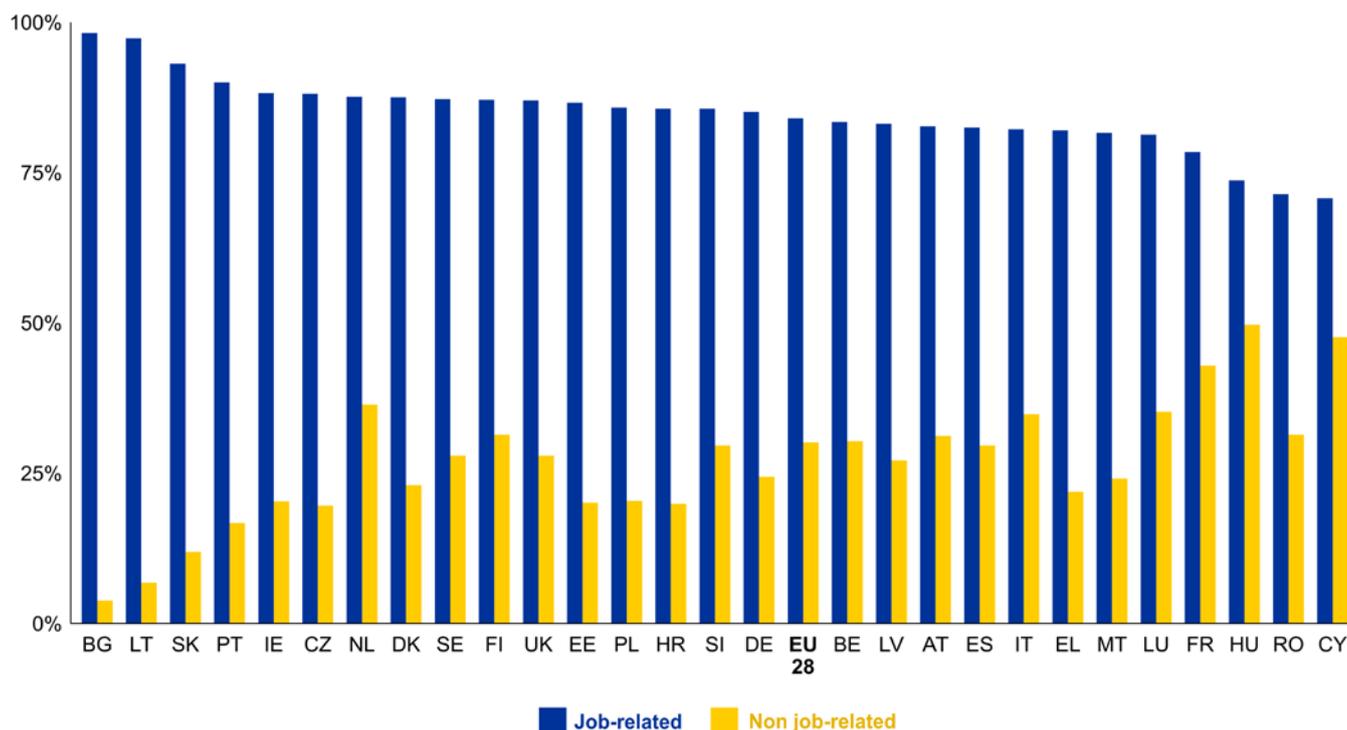
In summary, the overall participation rate of adults in non-formal job-related training in the EU28 increased between 2011 and 2016. The vast majority of adults in most of the Member States who participated in job-related non-formal education activities between 2011 and 2016 are sponsored by their employers, rather than activities not sponsored by their employers. This increased willingness of employers to provide training to their employees was often due to the economic expansion experienced by many Member States after the economic crisis. In a few Member States, the participation of adults in non-formal job-related activities not sponsored by the employer increased as a result of increased government or other funding for non-formal job-related activities, which took the burden off employers. Moreover, the overall decrease in participation in job-related non-formal education and training in Malta and Sweden is likely due to the simultaneous increase in the offer of formal education for adults.

² https://dares.travail-emploi.gouv.fr/IMG/pdf/rapport_plan_500_000_vf.pdf

2.3 Adults' participation in job-related and non-job-related training

Figure 3 shows the proportion of people reporting at least one non-formal education activity, participating in job-related or non-job-related training. Those reporting the activity are those that responded to the Adult Education Survey 2016 and reporting to have undertaken at least one non-formal training activity. Totals can sum greater than 100%. This is because people over a 12 month period can participate in both job-related and non-job-related training activities.

Figure 3: Participation rate in job-related v/s nonjob-related training (% of people aged 25-64 reporting at least one non-formal activity), 2016



Source: Eurostat, [EU Adult Education Survey](#). Special data extraction for DG EMPL. Note: the percentage indicates the share of adults, who have reported at least one relevant learning activity (i.e. at least one job-related or at least one non-job related) during the reference period, out of all adults who participated in non-formal learning activities.

On average in the European Union (EU28) 84% of adults aged 25 to 64 years old who have participated in at least one non-formal education activity over the 12 month period preceding the Adult Education Survey, report to have been engaged in job-related training, while only 30.1% participated in at least one non-job-related activity. This ratio is reflected more or less in all Member States, with all Member States having more adults involved in job-related non-formal education activities as opposed to non-job-related training activities. A few countries, such as Cyprus, France and Hungary register higher levels of participation in non-job-related non formal activities compared to the EU28 average.

The experts provided several explanations for this tendency. The types of adult learning activities appear to be closely intertwined with the job market, and participation has therefore been affected by the economic crisis. One of the consequences of the crisis was the shift of attention in adult education towards employability, therefore leading to an

increase in policy measures and training opportunities aimed at improving adults' job-related skills, overlooking non-job-related education. This seems to be the case in Denmark, Portugal and Slovakia, among others. On the other hand, the experts from Bulgaria and Slovakia cited a cultural reticence towards non-formal education, especially when such education is not useful in terms of improving job-related skills.

In the Member States that reported high levels of participation in non-job-related non-formal education, the experts pointed to several explanatory factors. These include the historically established network of Adult Education Centres (AEC) in Cyprus, which provides quality non-formal education since 1952; the government sponsored incentives to take part in non-formal education in France; and the richness in associations and lifelong learning opportunities which are embedded in Finnish culture.

All in all, the participation rate of adults in job-related non-formal education and training was very high, while the participation rate in non-job-related non-formal education and training activities was lower across the EU in across the 12 months preceding the 2016 AES. This is mainly due to the shift in attention in adult education towards employability after the economic crisis, which led to an increase in policy measures and training opportunities aimed at improving adults' job-related skills, overlooking non- job-related education.

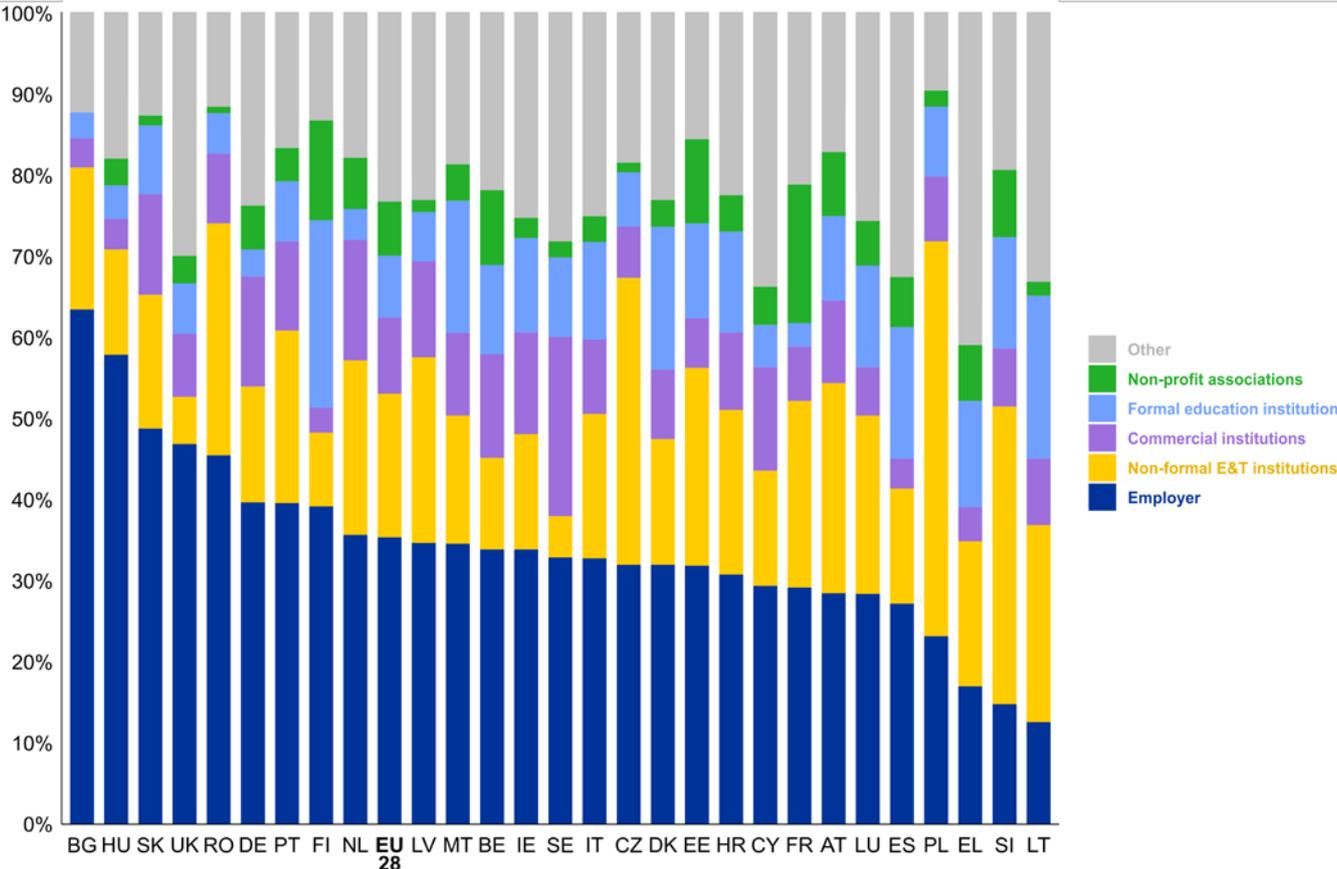
3 PROVIDERS OF ADULT LEARNING IN NON-FORMAL EDUCATION AND TRAINING

This section reviews data concerning providers in adult learning. It presents the relevant data against the average data for the EU and a synthesis of experts' interpretation around comparison with the EU average, national level considerations, as well as potential explanations for the data and trends.

3.1 Providers of non-formal adult learning (by number of learning activities)

Figure 4 below shows the main types of providers of non-formal adult learning for the Member States and the EU28 average in 2016. On average in the EU28, the main type of providers of non-formal education are employers (35.4%), followed by non-formal education and training institutions (17.7%). All the other types of providers, from commercial institutions to non-profit associations, from trade unions to formal education institutions, etc. constitute a mosaic of providers of adult education, with none of them amounting to more than 10%. This is reflective of the diverse European landscape of adult learning across the Member States, where elements such as tradition, culture and market structures shape the provision of adult education.

Figure 4: Share of non-formal adult learning activities by type of learning provider (2016)



Source: Eurostat, [EU Adult Education Survey](#), online data table: [trng_aes_170]. Note: 'Other' aggregates the five smallest categories according to the EU average: Individuals, Employers' Organisations, Non-commercial Institutions, Trade Unions and Other, it also includes the 'no answer' category. Disaggregated figures for each of these categories by country are presented in annex 1.

In the majority of Member States employers and non-formal education and training institutions are predominant providers of non-formal adult learning. In countries such as Bulgaria (63.5%), Hungary (57.9%), Romania (45.5%), Slovakia (48.8%) and the United Kingdom (46.9%), the share of adult learning activities provided by employers is the highest across the EU28. The experts point to several factors to explain the significant share of adult education provision by employers in their countries. In Hungary and Slovakia, this is explained by the structure of the economy: in Hungary, the labour market has been expanding since 2010 and has been marked by a lack of skilled workers – employers have thus taken it upon themselves to train their existing employees and hire unskilled workers with the objective of providing for their professional development; in Slovakia, the economic landscape is dominated by automobile manufacturing, a sector where employers provide highly specialised on-the-job training, including safety and introductory training to low-skilled manual workers. In Bulgaria, the expert points to recent Corporate Income Tax legislation, providing significant financial incentives to employers for training their personnel. Factors mentioned in previous sections, such as a limited culture of lifelong learning in some Member States, should be taken into account when looking at the predominance of employers-providing non-formal education (as it can be the result of a lack of interest in non-formal education when not provided/required by the employer and/or of a limited non-formal education offer outside of the workplace).

In other Member States where employers are not the main providers of non-formal education and training for adults (namely Czechia, Lithuania, Poland and Slovenia), the experts have pointed to explanations such as a long and established tradition of non-formal education providers (such as the Folk High Schools in Slovenia and the non-formal education and training institutions network, including houses of culture and leisure, in Lithuania). Additionally, the Czech expert suggested that the prevalence of non-formal education and training institutions in the country can depend on the tendency of employers to outsource training for their employees.

Moreover, in a number of Member States formal education institutions retain a considerable share of provision of non-formal training and education, ranging from 16.2% in Spain to 23.1% in Finland, against an EU28 average of only 7.6%. For those Member States whose formal education institutions retain a considerable share of non-formal education and training provision (which also include Denmark, Lithuania and Malta) experts reported that this is due to the high level of confidence in formal education institutions and by the variety of short-term non-formal courses offered by formal institutions. In the specific case of Denmark, a contributing factor is the progressive merging of non-formal adult training centres (AMU) with formal institutions.

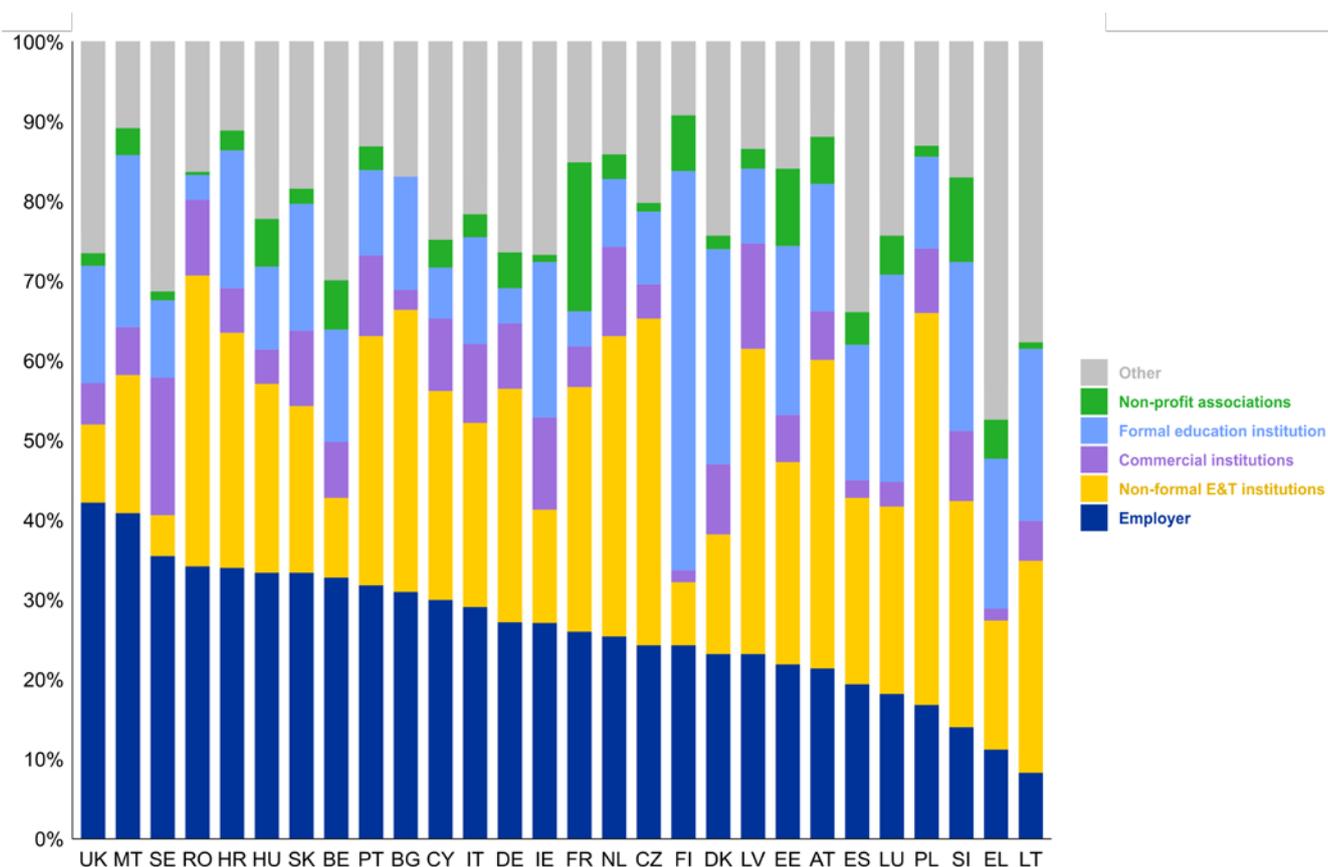
In summary, the main type of providers of non-formal education in the EU in 2016 were employers followed by non-formal education and training institutions. The significant share of adult education provision by employers is due to several factors including employers taking it upon themselves to train their employees and hire unskilled workers due to the lack of skilled workers in the labour market in some Member States (HU and SK), the provision of significant financial incentives to employers for training their personnel (BG) and a limited culture of lifelong learning. On the other hand, a long and established tradition of non-formal education providers results in employers not being the main providers of non-formal education and training for adults in other Member States. Moreover, formal education institutions provide a considerable share of non-formal training and education in

other Member States due the high level of confidence in these providers and the variety of short-term non-formal courses offered by these formal institutions.

3.2 Providers of non-formal adult learning (by number of hours)

Figure 5 provides the total time spent on non-formal adult learning in 2016, by type of provider per Member State. The breakdown of providers of non-formal education and training for adults according to the hours spent by participants allows for a deeper insight into the type and length of courses offered by the different providers.

Figure 5: Share of non-formal adult learning hours by main type of learning provider (2016)



Source: Eurostat, EU Adult Education Survey. Special data extraction for DG EMPL. Note: 'Other' aggregates the five smallest categories according to the EU average: Individuals, Employers' Organisations, Non-commercial Institutions, Trade Unions, and Other, and also includes the 'no answer' category. Disaggregated figures for each of these categories by country are presented in Annex 1.

As can be observed from Figure 5 above, the main providers of non-formal education and training for adults are also employers and non-formal education and training institutions when looking at it under the perspective of the number of hours of training provided. Interestingly, in terms of hours, formal education institutions generally appear as a more prominent provider of non-formal education and training for adults, gaining primacy in Denmark, Finland and Luxembourg.

Although in many cases the data results match those in Section 3.1, in some cases the results are slightly different. For example, while in terms of the number of learning activities, employers are- with some exceptions- the principal providers of non-formal adult education across the EU, as regards the number of hours provided, non-formal education

and training institutions are the main providers. This reflects the short and targeted nature of non-formal training offered by employers, as many experts point out, as opposed to more extensive courses offered by non-formal education and training institutions. The same applies for formal education institutions, which constitutes a considerably bigger share of hours of provision of non-formal education and training than of the number of participants, even becoming the main provider in Denmark, Finland and Luxembourg.

Among the explanations for this discrepancy, the Latvian and Italian experts point to the fact that non-formal education programmes are more structured and have to conform to legislation in order to be licensed, which often includes provisions on minimum and maximum amounts of hours. In Luxembourg, although between 2011 and 2016 the number of employers offering a variety of training courses for their employees increased, the number of hours decreased (possibly also influenced by the change in methodology).

Overall, the main providers, across the EU in 2016, of non-formal education and training for adults in terms of the number of hours provided were non-formal education and training institutions due to the extensive courses they provide, and employers. Formal education institutions also constitute a large share of hours of provision of non-formal education and training and are the main provider in Denmark, Finland and Luxembourg where non-formal education programmes in formal education institutions are more structured and often have minimum and maximum amounts of hours. As a consequence, in these countries formal education institutions emerge as prominent providers of non-formal education in terms of hours, while they don't in terms of share of learning activities.

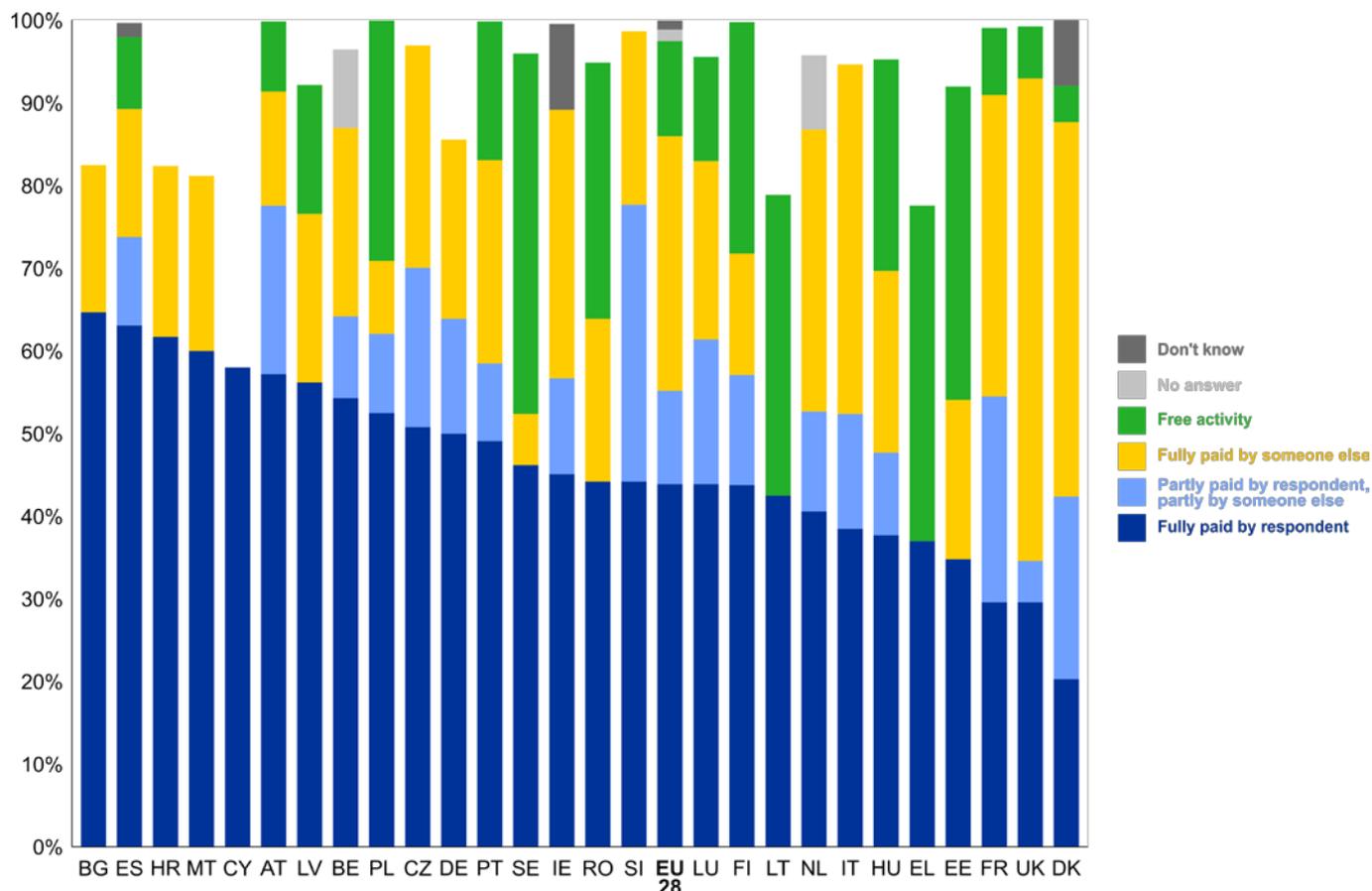
4 FINANCING OF ADULT LEARNING IN FORMAL AND NON-FORMAL EDUCATION AND TRAINING

This section reviews data concerning financing of adult learning. The EU Adult Education Survey, in particular, asks respondents to indicate who have paid the payment for tuition, registration, exam fees, and expenses for books or technical study means. It presents the relevant data against the EU average along with expert interpretation to explain the data and trends.

4.1 Sponsors of adult learning in formal education and training

Figure 6 below shows the share of adult learners who participated in formal education and training, reporting on who paid for their participation, including the individual who participated in the education or training activity ('respondent' in the figure).

Figure 6: Who sponsored adult learning in formal education and training (2016)



Source: Eurostat, EU Adult Education Survey. Special data extraction for DG EMPL. Note: Where small sample sizes mean that country data for a given category is considered unreliable, it has not been shown. Data for SK is not shown for comparison as the raw data has been flagged as unreliable

On average in the European Union (EU28) in 2016, more than half (55.2%) of adults who participated in formal education and training have either borne the full cost of the activity themselves (43.9%), or at least paid for it partly, sharing part of the costs with another party (11.3%). On the other hand, 30.8% of respondents of the Adult Education Survey indicated that ‘someone else’ fully paid for their formal education and training. The definition of who ‘someone else’ may be is quite broad and ranges from employers to family members³. As pointed out by many experts, activities financed directly by the State are generally perceived as free, and these represent 11.5% of formal education attended by adults responding to the AES. Additionally, 1.1% of respondents on average in the EU28 declared not knowing the source of funding, which – as the Danish and Spanish experts point out – can reasonably be considered as a free or ‘fully paid by someone else’ activity, given that if respondents had partly or fully paid for it, they would probably know.

³ EUROSTAT, 2017. AES (Adult Education Survey) Manual 2016, European Commission, Directorate F: Social Statistics Unit F-3: Labour market and lifelong learning, p. 113, available at: https://circabc.europa.eu/sd/a/700a220d-33dc-42d4-a5c4-634c8eab7b26/2016%20AES%20MANUAL%20v3_02-2017.pdf

In most European Member States, formal adult education is fully subsidized by the State until upper secondary level. Higher education and vocational education and training (VET) are usually subject to fees that are in many cases borne by the individuals themselves or by 'someone else'. In a few Member States (Greece, Poland and Nordic countries, among others), higher education (or at least parts of it) are free of charge. However, in many Member States the experts report the cost of formal education to be borne by individuals as problematic in the face of limited investment from the State in formal adult education and training and the generally limited willingness and/or ability of adults who need to up-skill or re-skill themselves to pay for their education.

In some cases – such as in the United Kingdom where 58.3% of formal education activities are fully paid by someone else – it is common that employers subsidize their employees' formal education if it is work-related. In others, it is customary that the adult's family bears the cost (or part thereof) of formal education above upper secondary level (especially in the case of young adults in higher education). This is the case in Italy, where the cost of formal adult education is borne fully by someone else in 42.3% of cases as a result of the Mediterranean welfare model/ tradition in which families are an important source of social protection.

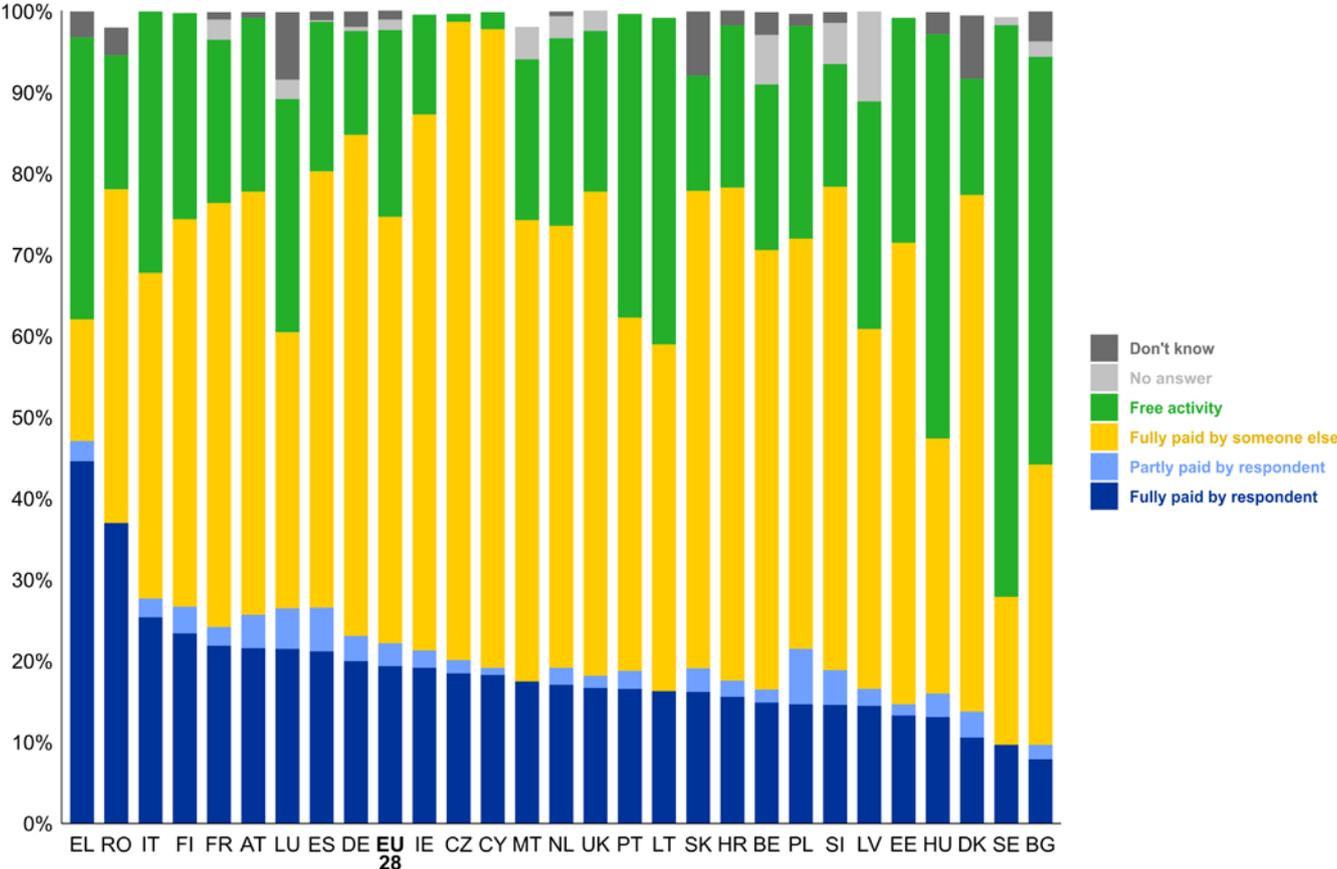
Some experts pointed out that education financing systems are rather complex, and respondents may not be fully aware of the source of funding of the activities they engage in. For example, participants may perceive that they bear fully the cost of an activity while a substantial part is funded by someone else; or they may not perceive clearly the distinction between an activity that is free or paid for by someone else. Furthermore, an important issue is also how the costs incurred for accommodation and subsistence is covered, however the survey does not include questions on the coverage of these (indirect) costs.

In summary, most adults who participated in formal education and training across the EU in 2016 have either fully or partly paid for the activity themselves or it was paid by 'someone else' (e.g. employers or family members). In most Member States, formal adult education is fully subsidized by the State until upper secondary level. Higher education and VET are usually subject to fees (apart from Greece, Poland and Nordic countries) that are in many cases borne by the individuals themselves or by 'someone else'. In some Member States, employers often subsidize their employees' formal education if it is work-related, while in others, the adult's family often bears the cost of formal education above upper secondary level. It is important to note, however, that financing systems are rather complex and respondents may not be fully aware of the source of funding of the activities they engage in.

4.2 Sponsors of adult learning in non-formal education and training

Figure 7 shows the share of adult learners who participated in non-formal education and training, reporting on who paid for their participation, including the individual who participated in the education or training activity ('respondent' in the above table).

Figure 7: Who sponsored adult learning in non-formal education and training (2016)



Source: Eurostat, [EU Adult Education Survey](#). Special data extraction for DG EMPL. Note: Where small sample sizes mean that country data for a given category is considered unreliable, it has not been shown.

When looking at adults who participated in non-formal education and training activities in 2016 in the EU28, it is evident that non-formal education activities are more widely subsidized (in most cases by employers) than formal education activities. The vast majority of respondents (75.5%) do not have to bear any cost to participate in non-formal education– the activities were reported as free (23%) or fully paid by someone else (52.5%). Only 19.4% of respondents indicated that they fully paid for their non-formal education activities in 2016 and 2.8% partly paid for such activities. It can be reasonably considered that the small (1.1%) proportion of respondents who reported that they do not know who paid for the non-formal education activities they participated in did not either fully or in part bear the cost (as some experts pointed out).

In most Member States, the rates of non-formal education sponsoring tend to be in line with the European average. However, Cyprus and Czechia stand out for the limited number

of activities reported as 'free' (2% and 1% respectively), but they also account for the highest rate of activities reported as paid by someone else (both at 78.6%). In Czechia, the expert explained that most adults participate in non-formal education activities when they are sponsored (and in the expert's words 'compelled') by their employers. In Cyprus, the Human Resources Development Authority (HRDA) employs external providers to offer a wide range of non-formal education and training, and either shares the cost with employers or fully subsidizes them. In any case, the participants are fully exempted from covering participation fees or costs. In countries such as Greece, Romania and (to a lesser extent) Italy, participants have to bear a large proportion of the costs of their non-formal education and training. According to the Italian expert, this is partly due to the high propensity of individuals who invest in non-formal education and training, especially among those who already possess higher professional and formal qualifications and are aware of the professional benefits of non-formal education and training.

Some country experts mentioned the role of European funds in sponsoring non-formal adult education and training. In Malta, the 'Invest in Skills' scheme (aid scheme with 80% EU and 20% national funding) encouraged employers to invest in their employees' non-formal education through financial incentives (covering up to 70% of the costs in the case of micro-enterprises). The experts from Latvia and Portugal also report the relevance of the European Social Fund (ESF), defined as "a major source of funding that directly supports education and training delivered by both employers and public/state-dependent organisations"⁴.

In summary, non-formal education activities were more widely subsidized than formal education activities in the EU in 2016. Moreover, the vast majority of respondents to the 2016 survey indicated that they did not have to bear any cost to participate in non-formal education as they were free or fully paid by someone else. Sponsors of non-formal education activities mainly include employers, in addition to the HRDA in Cyprus, and European funds (e.g. 'Invest in Skills' scheme in Malta and the ESF in Latvia and Portugal).

4.3 Total expenditure for non-formal education and training

Table 1 below shows an estimate of absolute total expenditure in millions of Euro on non-formal education and training, based on available data. It combines three different sources of expenditure – individual's own expenditure (estimated according to the EU Adult Education Survey (AES)), expenditure by private sector employers (estimated according to the EU Continuing Vocational Training Survey (CVTS)) and expenditure by the public sector through Active Labour Market Policies (ALMP), estimated according to the DG EMPL database on labour market policies.

⁴ Portuguese country report

Methodological note

There is no established methodology to estimate the total expenditure for non-formal education and training. The analysis presented in Table 1 is an aggregation of what were considered the most appropriate sources to provide an estimate of expenditure. The following should be noted:

- The question asked, and thus the definition of personal costs of non-formal education and training, in the AES is “In the last 12 months, how much you paid personally or other household member or relative for tuition fees, enrolment fees, exam fees, expenses for purchasing manuals or other technical study means (computer, software, CDs, DVDs, etc.) for this activity?”. The accuracy of the responses to this are reliant on the respondents recall.
- CVTS data only includes expenditure by enterprises from the private economy sector with at least ten persons employed, therefore, it does not include training expenditure for persons employed by micro-companies or public-sector employers.
- ALMP covers just those who are registered as unemployed or registered job-seekers.
- The reference year for Italy in the ALMP data is 2014 (rather than 2015).

Table 1: Total individual, private and public expenditure for non-formal education and training (2010/2011-2015/2016)

The data is expressed in millions of EUR.

	AES		CVTS		ALMP	
	2011	2016	2010	2015	2010	2015
EU28 ⁵	713	906	1907	2170	927	849
AT	572	944	1,392	1,324	1,484	1,589
BE	207	: ⁶	2,154	2,580	591	641
BG	18	28	68	140	1	6
CY	28	26	72	46	7	9
CZ	:	135	455	610	63	38
DE	5,839	5,431	12,746	15,479	6,997	6,180
DK	179	186	1,201	2,105	1,025	1,014
EE	21	24	42	100	8	16
EL	105	170	251	296	39	78
ES	1,115	3,942	3,878	4,135	1,909	1,231
FI	243	330	659	578	951	1,005
FR	3,126	3,601	13,004	13,321	6,501	5,925
HR	:	77	139	167	:	97

⁵ The means were calculated just for the countries where data was available/reliable

⁶ Denotes unavailable data

HU	- ⁷	-	356	382	48	28
IE	:	109	:	1,201	641	577
IT	2,554	3,025	3,896	4,514	2,341	2,761
LT	17	19	47	79	20	25
LU	43	37	227	316	15	27
LV	39	26	27	45	44	15
MT	9	9	34	45	1	2
NL	- ⁸	-	3,331	3,753	804	451
PL	557	467	763	1,000	129	51
PT	354	307	875	503	690	480
RO	38	46	183	289	4	2
SE	494	339	1,407	2,061	357	652
SI	50	94	191	282	44	16
SK	82	90	261	251	4	8
UK	:	3,189	3,820	5,171	307	:

Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, [EU Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015).

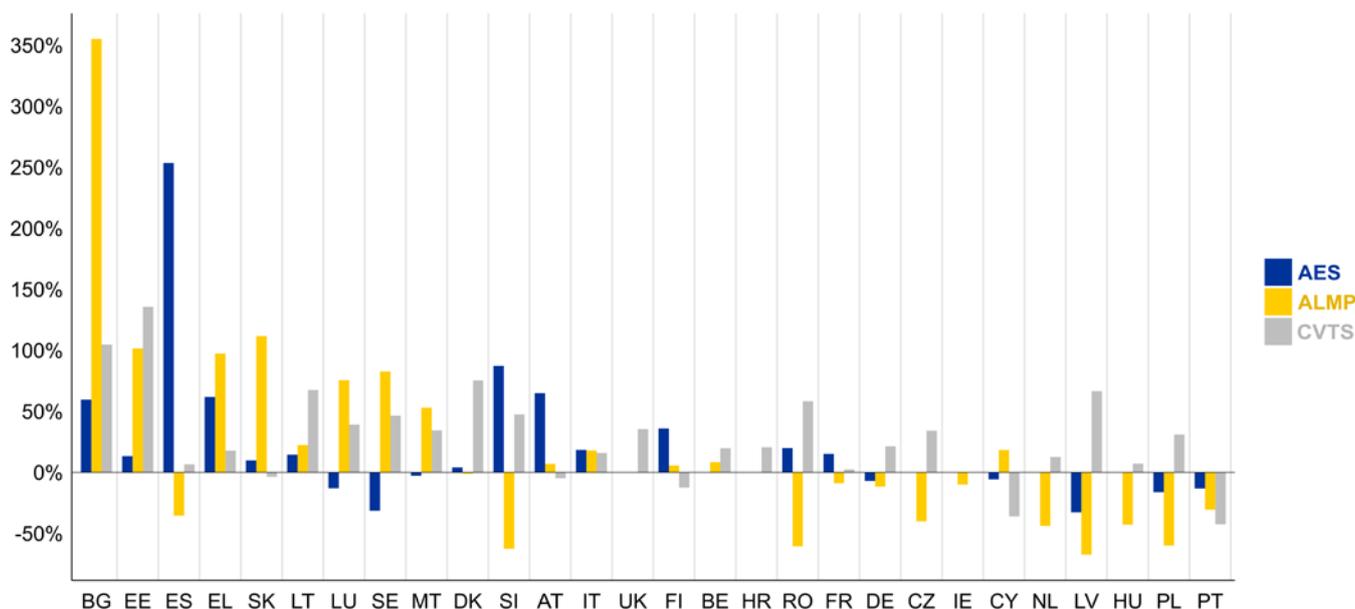
On average in the European Union, the trend in total expenditure for non-formal adult education has seen an increase in individuals' and private employers' expenditures and a decrease in active labour market policies investment. This data gives an important snapshot of the reality of adult non-formal education expenditures and their variation between the two time periods analysed.

Considering that absolute total figures are not directly comparable across Member States for several reasons (e.g. population size, cost of living, etc.), Figure 8 provides a further level of analysis by visualising the variations in time with the '0%' line representing the level of expenditure per Member State in 2010 (2011 in the case of AES) and the bars showing the positive and negative variations between 2010/2011 and 2015/2016. While Table 1 shows how much and which Member States invest the most in non-formal education, Figure 8 highlights dramatic variations, especially in individuals' expenditures (AES) and public investments (ALMP), which are not necessarily reflective of the size of the investments.

⁷ AES data not shown because the country expert has challenged its accuracy.

⁸ See 8.

Figure 8: Variations in total expenditures for non-formal education between 2010/2011 and 2015/2016 (AES, ALMP, CVTS)



Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, [EU Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015). Note: AES figures for HU and NL not shown since respective country experts have queried the accuracy of the data. AES percentage change for BE, CZ, HR, IE, and UK could not be calculated due to missing data. CVTS percentage change for IE could not be calculated due to missing data. ALMP percentage change for HR and UK could not be calculated due to missing data.

Figure 8 illustrates that there was a general increase in total expenditure for non-formal adult education and training across Member States and across categories (i.e. individuals – AES; private employers – CVTS; public investment – ALMP). Individuals’ and private employers’ expenditures in particular increased in most Member States, while levels of public expenditure fluctuate across categories and the Member States. It is worth noting however that decreases in one or another category are usually compensated by increases in another – except in the case of Portugal, which is the only country where all three categories decreased their level of investment in non-formal adult education and training. The Portuguese expert explains this overall decrease in investment in adult learning as being one of the results of the prolonged economic crisis in Portugal, and of the structural adjustment measures imposed by the International Monetary Fund, the European Central Bank and the European Commission to Portugal from 2011 to 2016.

The most striking variation across the board is the dramatic increase in Active Labour Market Policies investments in Bulgaria, where training opportunities organized by the Employment Agency and aimed at developing such policies constitutes the bulk of ALMP in Bulgaria. According to the expert’s assessment, the Bulgarian government has issued in the time period analysed several relevant policy documents (action plans), including: National Employment Action Plans (NEAP) and Action Plans for the Implementation of the

National Strategy for Lifelong Learning (2014-2020 – APINSLLL). These mainly targeted the long-term unemployed and unemployed adults without a professional qualification.

In Spain, the total amount of money invested by individuals in non-formal education and training almost tripled between 2011 and 2016. According to the Spanish expert, this is mainly due to the increased unemployment levels following the 2008 economic crisis, coupled with an improved awareness of the link between education and training and employment opportunities and a contraction of public investment in adult learning. Similar circumstances apply – albeit to a lesser extent – to the Greek situation.

In summary, there was a general increase in total expenditure in non-formal adult education across the EU Member States and categories (i.e. individuals, private employers and public investment in active labour market policies) from 2010/2011 to 2015/2016. Individuals' and private employers' expenditures in particular increased in most Member States (e.g. in Greece and Spain as a result of increased unemployment levels coupled with improved awareness of the link between education and training and employment opportunities following the economic crisis) while levels of public expenditure fluctuate across categories and the Member States.

4.4 Non-formal education and training expenditure per participant

Table 2 below shows the expenditure on non-formal education and training, calculated on a per-participant basis, in EUR (i.e. dividing the total expenditure of a particular source of financing by the total number of participants financed by that source). It combines three different sources of expenditure – individual's own expenditure (estimated according to the EU Adult Education Survey), expenditure by private sector employers (estimated according to the EU Continuing Vocational Training Survey) and expenditure by the public sector through active labour market policies (estimated according to the DG EMPL database on labour market policies). Note that ALMP expenditure data for Italy is for the reference year 2014 (instead of 2015) and CVTS data only includes expenditure by enterprises from the private economy with at least ten employees, therefore it does not include training expenditure for employees by micro-companies or public-sector employers (see note on page 32).

Table 2: Per capita individual, private and public expenditure for non-formal education and training (2010/2011-2015/2016)

	AES		CVTS		ALMP	
	2011	2016	2010	2015	2010	2015
EU28	170	232	1,403	1,418	: ⁹	:
AT	269	335	2,037	1,365	12,654	14,453
BE	106	:	2,323	2,600	4,697	4,664
BG	18	32	215	363	304	2,262
CY	146	121	1,118	839	2,628	1,492
CZ	:	52	296	281	:	:
DE	269	242	1,564	1,800	7,121	6,099
DK	116	145	2,558	4,685	12,926	18,273
EE	61	81	488	908	6,146	6,266
EL	181	206	1,040	1,050	24,494 ¹⁰	2,509
ES	124	387	1,034	1,063	5,044	3,960
FI	166	244	1,425	1,257	16,752	14,541
FR	195	223	2,222	2,341	11,014	11,248
HR	:	113	825	825	:	5,854
HU	57	257	1,164	1,039	2,575	4,895
IE	:	86	:	1,887	11,162	13,227
IT	222	229	1,215	1,149	2,995	3,536
LT	38	47	404	417	5,553	6,413

⁹ Denotes unavailable data

¹⁰ Although this number seems high, there is no particular explanation presented with the raw data, nor that the expert can offer.

LU	219	272	1,845	1,838	16,485	20,624
LV	105	53	289	366	4,507	5,715
MT	119	114	1,027	1,158	694	2,701
NL	1	204	2,309	2,154	4,359	3,512
PL	119	94	406	425	7,386	9,428
PT	154	124	1,054	566	8,310	3,749
RO	46	75	:	396	431	163
SE	152	121	1,775	1,668	23,032	19,376
SI	121	185	1,010	1,180	4,581	6,326
SK	67	65	608	451	2,675	3,672
UK	:	237	872	961	:	:

The data is expressed as average expenditure in EUR per participant in learning activities.

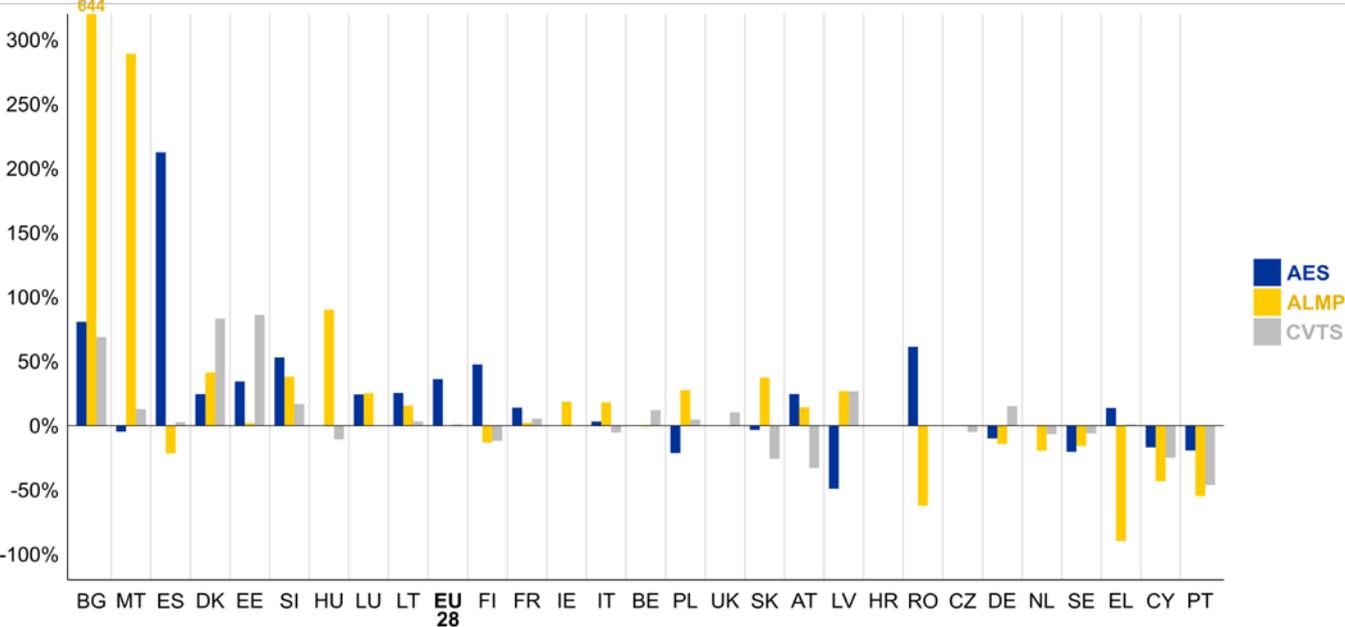
Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, [EU Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015). There is no adjustment of the data to take account of different levels of prices and living standards across countries.

When looking at *per participant* expenditures, it is easier to compare the expenditure levels across Member States, as well as the real levels of expenditure per participant to non-formal adult education. The highest expenditure levels are in state investments in Active Labour Market Policies. Some experts point to the fact that state-sponsored education and training opportunities often involve longer and more in-depth programmes aimed at supporting vulnerable target groups, which tend to be more costly. In Denmark, although the total expenditure of private sector employers in adult learning is higher (more than twice as much in 2015) than that of the public sector (see Table 1), this reversed when looking at *per participant* expenditure (see Table 2). In the expert's opinion, this is due to the size of the population in employment as compared to people who are not, as well as the nature of the learning itself. In Austria, ALMP include youth coaching and measures aimed at supporting NEETs (young people Not in Employment, Education or Training) and is supported by important measures funded by the European Social Fund (ESF), specifically in the field of basic education for adults and the implementation of the Upskilling Pathways Strategy¹¹.

Figure 9 below illustrates the variations in levels of expenditure in the three categories (AES, CVTS and ALMP). Interestingly, these do not necessarily correspond to the variations in total expenditure levels observed in Figure 8. This is mainly due to the expansion or contraction of the target populations of non-formal education expenditures over the time period analysed (i.e. indirectly to the trends in the labour market and employment levels in the Member State); and to the level of responsiveness of individuals, employers and governments.

¹¹ COUNCIL, 2016. *Council Recommendation of 19 December 2016 on Upskilling Pathways: New Opportunities for Adults*, 2016/C 484/1, Official Journal of the European Union, available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ%3AJOC_2016_484_R_0001

Figure 9: Variations in per capita expenditures for non-formal education between 2010/2011 and 2015/2016 (AES, ALMP, CVTS)



Sources: Eurostat, [EU Adult Education Survey](#) (reference years – 2011 and 2016), special data extraction for DG EMPL; Eurostat, [EU Continuing Vocational Training Survey](#) (reference years – 2010 and 2015), special data extractions for DG EMPL; DG EMPL [Labour Market Policy \(LMP\) Database](#) (reference years – 2010 and 2015). Note: AES figures for HU and NL not shown since respective country experts have queried the accuracy of the data. AES percentage change for BE, CZ, HR, IE, and UK could not be calculated due to missing data. CVTS percentage change for IE and RO could not be calculated due to missing data. ALMP percentage change for CZ, HR, and UK could not be calculated due to missing data.

When looking at variations in expenditure *per participant*, Cyprus, Portugal and Sweden reported a decrease in all categories of expenditure analysed. This can be explained by different and in some cases contradictory factors, spanning from the limited ability of governments and individuals to invest in non-formal education as a prolonged consequence of the economic crisis, to a reduction in the need of such investments due to economic recovery.

For example, in Greece public investment in Active Labour Market Policy non-formal education and training experienced a substantial increase between 2010 and 2015 in terms of total expenditure (see Figure 8), but an almost equal drop if expressed in terms of *per participant* expenditure over the same period (see Figure 9). The Greek expert indicated that this was due to the significant rise in unemployment which, between 2010 and 2015 rose from 12.9% to 24.9%, thus dramatically increasing the need for investment in adult education, but also the pool of beneficiaries of ALMP measures.

Overall, the highest expenditure levels per participant across the EU Member States from 2010/2011 to 2015/2016 were in state investments in Active Labour Market Policies. This may be due to the fact that state-sponsored education and training opportunities often

involve longer and more in-depth programmes aimed at supporting vulnerable target groups, which tend to be more costly. However, variations in expenditure *per participant* exist. For example, in some Member States a decrease in all categories of expenditure analysed was reported which may be due to the limited ability of governments and individuals to invest in non-formal education as a prolonged consequence of the economic crisis and a reduction in the need of such investments due to economic recovery.

5 IMPLICATIONS AND CONCLUSIONS

This report has brought together data in the area of adult learning participation, providers and investment. It has considered the state of play in adult learning across European Member states, drawing on examples, analysis and interpretation provided by a set of in-country experts.

This section presents an overarching summary and conclusion to the report.

In summary, the following key points can be highlighted in relation to the following areas of Adult Learning on the basis of the data reviewed as part of this report:

- Participation in Adult Learning:

Participation of adults in formal education in the EU has decreased slightly from 2013 to 2016, while the participation of adults in non-formal job-related training across the EU increased between 2011 and 2016. These trends in participation vary greatly across the Member States and can be seen to reflect changes in the socio-economic landscape in Member States, the 2008 economic crisis and migratory flows. On the basis of the evidence from country reports, the economic crisis can be seen to have had a particular impact on the participation of adults in formal education as it prompted governments to adopt policy measures aimed at encouraging or enabling adults to re-train and/or further their education in order to improve their ability to access the labour market. Moreover, the increased willingness of employers to provide non-formal education activities to their employees was often due to the economic expansion experienced by many Member States after the economic crisis, and increased government or other funding for non-formal job-related activities. Migratory flows also caused an influx of participants in programmes up to upper secondary education level in some Member States and a decrease of adults in higher levels of education in other Member States. Similarly, the participation rate of adults in job-related non-formal education and training was very high, while the participation rate in non-job-related non-formal education and training activities was lower across the EU in 2016 (i.e. the 12 months preceding the AES). This is also mainly due to the shift in attention in adult education towards employability after the economic crisis, which led to an increase in policy measures and training opportunities aimed at improving adults' job-related skills, overlooking non-job-related education.

Considering the evidence presented by experts, and the apparent focus on the provision of job-related education and training, it may be an opportune juncture for a review of the degree to which this focus on job-related competencies has ensured that employer's needs are well met in the period of recovery following the economic crisis. It may be that there are some skills and competencies that are less technical in their nature, or more 'tacit' which may be developed amongst those entering and progressing through the labour market which will better position labour markets for growth and competitiveness going forward. An audit-type exercise of employers based in European Member States, to determine reported skill gaps within labour market entrants, and indeed existing employees would be an interesting focus for comparative research. This would help to identify whether there are certain types of skills that could be better developed within the EU workforce to ensure that it is competitively placed for the future. This may form a basis for European Commission, and other EU level institutions and agencies to encourage development of shortfall skills through measures such as peer-learning initiatives.

- Providers in Adult Learning:

The main providers of non-formal education (by both share of participants and number of hours) in the EU in 2016 were employers and non-formal education and training institutions. The significant share of adult education provision by employers is due to several factors including employers taking it upon themselves to train their employees and hire unskilled workers due to the lack of skilled workers in the labour market in some Member States, the provision of significant financial incentives to employers for training their personnel and a limited culture of lifelong learning. In other Member States there is a long and established tradition of non-formal education and training institutions which provide extensive courses to a significant share of adults for many hours. Formal education institutions also provide a considerable share of non-formal training and education in other Member States due to the high level of confidence in these providers, the variety of short-term non-formal courses offered by these formal institutions, and the existence of structured non-formal education and training programmes in these Member States which often have minimum and maximum amounts of hours (which influence the prominence of formal education institutions in terms of share of training hours provided).

In considering the analysis provided by in-country experts in the area of adult learning providers, the prominence of employers as an investor in adult learning and skills development in the European Member States clearly emerged. The contribution of employers in adult learning and training is important and of great value in ensuring provision that is tailored and focused on meeting sector needs. As economies recover from the economic recession and look to growing skills for the future, there may be merit in considering whether such reliance on private sector investors in developing workforce based adult skills brings with it any limitations or risks.

For instance, there may be a risk that the skills and learning developed reflects the short-term needs of commercial markets, rather than a systematic and strategic consideration of skills required for sector growth into the future. On the other hand, there may be limitations to the transferability of skills and competencies developed on the basis of learning programmes delivered by employers in a particular market or sector. In highlighting the important role of employers in the provision of adult learning, this research does in no way seek to identify any issues in the quality of provision offered by employers in EU Member States. It does however, suggest that there is a need for adult learning delivered by the public sector to complement and supplement employer investment, based on a strategic consideration of long-term growth sector forecasts as well as personal and societal needs. European institutions might further consider how employers and public providers might be supported to build capacity and facilitated to share information, working together to build skills amongst Europe's future workforce.

- Financing of Adult Learning:

Most adults who participated in formal education and training across the EU in 2016 have either fully or partly paid for the activity themselves or it was paid by 'someone else' (e.g. employers or family members). In most Member States, formal adult education is fully subsidised by the State until upper secondary level, while higher education and VET are usually subject to fees (apart from Greece, Poland and Nordic countries) that are in many cases borne by the individuals themselves or by 'someone else'. However, non-formal

education activities were more widely subsidised than formal education activities in the EU in 2016. Moreover, most non-formal education activities were reported in the 2016 survey to be free or fully paid by 'someone else' (i.e. mainly sponsored by employers).

There was a general increase in total expenditure in non-formal adult education across the EU Member States and sources of financing (i.e. individuals, private employers and public investment in active labour market policies) from 2010/2011 to 2015/2016. Individuals' and private employers' expenditures in particular increased in most Member States (e.g. in Greece and Spain as a result of increased unemployment levels coupled with improved awareness of the link between education and training and employment opportunities following the economic crisis) while levels of public expenditure fluctuated across categories and the Member States.

However, the highest expenditure levels per participant across the EU Member States both in 2010/2011 to 2015/2016 were in public investments in Active Labour Market Policies. This may be due to the fact that state-sponsored education and training opportunities often involve longer and more in-depth programmes aimed at supporting vulnerable target groups, which tend to be more costly. However, variations in expenditure per participant exist. For example, in some Member States a decrease of per participant expenditure across all sources of financing analysed was reported which may be due to the limited ability of governments and individuals to invest in non-formal education as a prolonged consequence of the economic crisis and a reduction in the need of such investments due to economic recovery.

As mentioned above, the economic crisis and resulting austerity measures have had a two-sided effect, namely a contraction of public/private investment in some Member States at the same time as expansion in others. A pattern can thus be seen in several Member States whereby economic contraction has led to a rise in unemployment and a difficulty for people to re-enter or access the job market for the first time. This has resulted in a higher demand for upskilling/re-skilling, subsequent state intervention to boost investment in adult learning, and a resulting increase in formal education participation. Conversely, in some Member States, recovery following the economic crisis has led to a drop in levels of unemployment. Reflecting this, as the job market has expanded, employers have been more able and willing to invest in employees training. As such, a rise in non-formal education participation has been seen.

It should be noted however, that whilst trends in the contraction/ expansion were observed on the basis of the expert's reports, the Member States may have been at a different point of the "curve", therefore reporting both increases and decreases in participation and expenditure even when the underlying explanations identified by the experts are very similar.

What is clear is that participation and investment in adult learning is responsive to the buoyancy of economic markets, and that public sector plays an important compensatory role in ensuring that labour markets are equipped through the development of adult skills in times of economic contraction. In addition, it can be seen that the private sector has a particularly important role in building skills amongst their workforce, especially in times when economic markets are faring well and in a position to build for the future. In this context, measures and interventions to improve the quality of adult learning through

facilitating information flows and learning between the public and private sectors as they share the role of investor and provider would seem prudent and particularly welcome in order to support Europe's labour market in capitalising on opportunities for future growth. Supra-national agencies and institutions acting in the employment space in Europe have potential to play a supportive and facilitative role in this way.

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