



Nordic Voices
Teaching and Researching Comparative
and International Education
in the Nordic Countries

Edited by Halla B. Holmarsdottir and Mina O'Dowd

Nordic Voices

COMPARATIVE AND INTERNATIONAL EDUCATION:
A Diversity of Voices
Volume 3

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Nordic Voices

Teaching and Researching Comparative and International Education in the Nordic Countries

Halla B. Holmarsdottir
Oslo University College

Mina O'Dowd
Lund University



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TABLE OF CONTENTS

1. Introduction.....1
Halla B. Holmarsdottir and Mina O'Dowd

PART I: VOICES OF THOSE INVESTIGATING DISCOURSE, THEORY AND METHOD IN THE RESEARCH FIELD

2. The post-Lisbon discourse on skills mismatches and competence upgrading ...9
Marcella Milana
3. Global influences and national peculiarities in education and training:
the Finnish case25
Sara Frontini
4. Interprofessional cooperation between teachers and librarians: analysing
theoretical and professional arguments for cooperation in an era
of globalization39
Joron Pihl
5. Citizenship education and intergovernmental organizations: contrasting
the national model to the emerging post-national agenda59
Nelli Piattoeva
6. Social cartography mapping in theory and practice: a method
for visualizing discourse and social change.....75
Mina O'Dowd

PART II: VOICES OF THOSE STUDYING TEACHERS, SCHOOLS AND CHILDREN

7. Private schools and social segregation in basic education: the case
of Norway97
Jon Lauglo
8. Teachers' voices: challenges with democracy in multicultural
Scandinavian schools121
Heidi Biseth
9. Trajectories in a changing field: Teacher education students in Denmark
and the USA143
Jette Johanne Elisabeth Steensen

TABLE OF CONTENTS

10. Voices from the field: negotiating literacy education in a multicultural setting159
Kristin Skinstad van Der Kooij and Joron Pihl

11. A digital divide: challenges and opportunities for learners and schools on each side.....173
Gréta Guðmundsdóttir and Sólveig Jakobsdóttir

PART III: VOICES OF THOSE RESEARCHING THE INTERNATIONAL CONTEXT

12. The HIV/AIDS pandemic in South Africa: cultural constraints and education205
Anders Breidlid

13. A tale of two countries: language policy in Namibia and South Africa.....221
Halla B. Holmarsdottir

14. Making and implementing education policy in the context of external support to sector development programs: the case of Mozambique, with comparisons239
Tuomas Takala

15. Education that builds peace or fuels armed conflict257
Kendra Dupuy

PART IV: CONCLUSION

16. A way forward281
Holger Daun

17. Reflections309
Mina O'Dowd and Halla B. Holmarsdottir

Contributors.....313

1. INTRODUCTION

The Nordic countries have much in common, not only historically, but also culturally and linguistically. A common labour market and strong co-operation have existed between the countries for many years. For example, these countries have had an employment and educational mobility policy, which resembles that which the EU is currently implementing. Moreover, the Nordic welfare state model, based on the rights of individuals to a decent life and equal opportunities for social promotion, is viewed as best achieved through education. In the Nordic countries free and equal access to education at all levels has played an integral roll as regards ensuring equal educational opportunities. It is safe to say that education has long been seen as one of the pillars of Nordic societies, with a long history of literacy.

While the Human Development Report recognizes the Nordic countries overall as some of the best countries in the world in which to live, it simultaneously lists a number of countries in Africa, for example, at the bottom of the list. Given the high levels of democracy, education, income and public wealth, the Nordic countries have historically been committed to development co-operation in the name of solidarity, such as it is reflected in development policies, the aim of which is the support of many of the world's poorest countries. In addition to clearly defined priorities with development policies in such areas as the environment and climate change, crisis prevention and support for peace processes, the Nordic countries underscore the importance of education, especially as regards its capacity to effect change in the aforementioned areas.

Despite overall similarities, there are many features of the individual Nordic countries that make them distinctively different. In this volume some of the differences are manifest in the chapters, written by the sixteen comparativists whose work is presented herein. This volume aims to provide insight into the diversity of research being conducted in the northernmost parts of Europe. Although it would be incorrect to assert that research in this far away part of Europe represents something drastically different than that done in other parts of the world, it would be equally incorrect to maintain that being at the outskirts, on the cusp, or on the periphery – whichever way one wishes to describe the position of the Nordic countries in relation to the rest of the world – does not influence the ways in which educational processes, phenomena and their consequences are viewed.

We have divided the book into four parts. In Part I Marcella Milana examines EU policy-making processes and agenda settings for competence development.

This discussion is framed within the context of the Lisbon Agenda, or as it is often referred to, the Lisbon process, which the author stresses constitutes a regulatory ideal for competence development in the European context. Milana makes clear the discrepancy between national labour markets and the education and training policy put in place by the EU, problematising the consequences of this discrepancy at the individual and national levels. Moreover Milana concludes that the EU regulatory ideal is based on a number of assumptions that appear to conflict with the diversity that is represented by the many different national and labour market contexts that is Europe. Finland represents one of these contexts that has over the years adopted its own strategy with regard to the EU education and training policy, especially as this relates to vocational education and training (VET). As Sara Frontini describes in her chapter, Finland has been able to move from its geographically peripheral position in relation to Europe to the forefront and gain a central position with regard to vocational education and training policy and practice, influencing EU policy through its own success and best practices in this field. The case of Finland, Frontini maintains, shows that “a fundamental element that underlies the Finnish centrality in the VET is the tradition of anticipating skills and competence needed in the labor market”, a tradition that the EU would appear to lack. Frontini’s research indicates that the case of Finland shows that “central countries are those realities that have the strongest relations with the global level, obtaining apparently immediate benefits”.

Whereas Frontini discusses the pre-conditions for active EU participation by a specific nation state, Nelli Piattoiva discusses the internal and external challenges that face nation states, especially with regard to citizenship education. That which once was considered the relatively uncomplicated task of educating the citizenry is increasingly being challenged by, among other things, the rapidly changing socio-political position and legitimacy of the nation state and the ever-increasing influence of supranational organisations. Piattoiva stresses the importance of understanding the significance of post-nationalism, which “decouples citizenship from nationality as it posits citizen rights within a wider global context”. Through her analysis of supranational organisations and their documents as regards citizenship education, the author argues that “[T]he co-existence of the national discourse of citizenship and the post-national discourse of universal human rights indicates that the supranational script of citizenship education is far from renouncing the traditional notion of national citizenship”. Linked to the issue of citizenship Joron Pihl maintains that interprofessional cooperation between teachers and librarians can benefit, not only literacy and empowerment, but also citizenship within ever more diverse national contexts. Pihl argues that “[t]oday literacy is conceptualized in terms of cultural literacy, computer literacy, information literacy, visual literacy and political literacy”. This means that schools as well as libraries can contribute to the development of these rich and complex forms of literacies”. The potential of interprofessional cooperation is advanced as a possible contribution to teachers’ own professionalism through the realization of the educational mandate, which at the same time contributes to pupils’ learning, literacy and democratic participation.

Ending this first part of the volume is a chapter on social cartography. Developed by Roland G. Paulston, social cartography is a method for visualising educational and social change. In this chapter Mina O'Dowd focuses on the usefulness of social cartography: "as a heuristic tool for comparative education" in which mapping demonstrates "its epistemological value, practical utility and ethical-political worth" (Paulston, 1996: 432). This chapter deals also with the future of comparative education, such as it is expressed in the on-going debate on methodology. As the field increasingly welcomes more and more comparativists, especially from mainland China, Hong Kong, Taiwan and the Philippines (Bray, Adamson & Mason, 2007), Paulston's challenge appears even more relevant than when it first was made: "By using maps as a part of our comparative studies we may provide an insider view, a visual dialogue of cultural flow and changing influences appropriate for future work in comparative education, particularly in those instances where cultural values and differences are revealed by competing knowledge claims (Liebman & Paulston, 1994: 244).

In Part II we turn our attention to teachers and the institutional setting for education in which they work. Jon Lauglo describes free choice and how it has affected private schooling in many parts of the world. Against this background, Lauglo presents data from Norway on the highly regulated free choice option offered parents. Lauglo's research clearly shows that, due to the Norwegian government's intervention, private schooling in Norway does not result in widening the socio-economic gap between private schools and public schools.

While Jon Lauglo's chapter focuses on private school, Heidi Biseth's focuses on public schooling in the multicultural contexts of Norway, Sweden and Denmark. Interviewing teachers on questions concerning their practice and its consequences for pupils' attitudes, knowledge and behavior as regards democracy, the main concern of Biseth's chapter is the increasingly complex multicultural school settings in the Nordic countries. Biseth shows that "education for democracy is taking place through the provision of a solid general education containing fundamental knowledge needed in a democracy, yet without necessarily a thorough investigation or problematization of the concept of "democracy" itself". Jette Steensen's research on teacher education students in Denmark and the United States reveals interesting differences as to how teacher training programs, socio-economic background and cultural contexts interact. Whereas "the interplay of diversity and identity emphasizes the limitations of teacher education aiming at the creation of a standardized professional identity", the effort to re-socialise teacher education students into such a "standardized professional identity" may have serious consequences for both the students themselves and in the long-term for schooling as well, leading to reduced socio-cultural and socio-economic diversity.

Addressing the situation for pupils with limited linguistic skills and with different academic abilities in increasingly diverse Norwegian schools, Kristine Skinstad Van Der Kooij and Joron Pihl describe a research development project involving schools, teacher education institutions and a public library. The project is two-fold. On the one hand, it strives to establish interprofessionalism between teachers and librarians (See Pihl's chapter in this volume) and, on the other hand,

it strives to provide pupils with greater opportunities to develop their linguistic and other skills through the pooling of resources that interprofessional cooperation between teachers and librarians constitute. Also focusing on opportunities for learners, Gréta Guðmundsdóttir and Solveig Jakobsdóttir share with us the results of their comparative study of the digital divide from research conducted in schools in Iceland and South Africa. Problematizing the concept of digital divide, the authors apply Kanwar's recommendation (2007) to view the same phenomena as an opportunity to re-conceptualize the concept as "digital dividend". Showing the stark contrast between the opportunities for ICT skills and knowledge development in Iceland and South Africa, the chapter gives rise to many important questions: What of the negative consequences of the widespread usage of ICT in Iceland? To what extent can Icelandic pupils' experiences with ICT benefit pupils in South Africa? Or are the Icelandic experiences of ICT relevant in the South African context? These are also questions that can be posed with reference to the research reported in the next part of this volume.

In Part III the query as to whether universal or local contexts can and should provide the framework for analysis of comparative research conducted in so-called developing countries is of significance. Anders Breidlid's chapter on schooling and HIV/AIDs in South Africa focuses on the cultural and sexual traits associated with South Africa and their consequences for knowledge and behaviour in HIV/AIDS educational intervention programs. Breidlid maintains that, given that neither cultures nor behaviour/practices are static, prevention programs aimed to meet the challenges inherent in the South African HIV/AIDS pandemic require acknowledgement of the cultural and contextual aspects that clearly play an important role with regard to sexual practices and the spreading of HIV/AIDS.

In Halla B. Holmarsdóttir's chapter the focus is on the development of discriminatory language-in-education policies, especially as these reflect the influences of apartheid in Namibia and South Africa. Through "systematic social engineering, which lead to an uneven distribution of resources, inequitable access to institutions and knowledge production", apartheid was responsible for the oppression of generations of women, men and children. Holmarsdóttir shows how remnants of Apartheid can be seen in the current language-in-education policies in present day Namibia and South Africa: "the policies have merely remained a symbolic gesture", rather than concrete governmental support in implementing language policies in education. Both governments have instead allowed "people to make their own assumptions". Moreover, Holmarsdóttir's analysis shows that, seen in relation to the influence of globalization on the language-in-education policies, both countries have been influenced differently, Namibia through external pressure and South Africa through both external actors and internal activism. External support to sector development programs in making and implementing education policy is the focus of Tuomas Takala's chapter. Takala presents research on sector development programs in Nepal, Ethiopia and Tanzania and contrasts these findings to the case of Mozambique. "As an evolving new mode of development cooperation, support to sector development programs is intended to bring about national ownership of these programs. Paradoxically, however, aid-dependence has been a contributing

factor in those developing countries that have devised and adopted sector programs”. Takala identifies in both Nepal and Tanzania the Government-donor relationships as prescriptive and “watchdogging” its implementation, while in Mozambique and Ethiopia the relationships “can be characterized as more matured dialogue”.

In all of the countries that have been reported on in Part III, armed conflict has severely crippled many of these countries’ potential for growth and social justice. In her chapter Kendra Dupuy addresses the issue of education that builds peace or fuels armed conflict, advocating peace education as a means by which to ensure inclusion. Dupuy maintains that “[e]ducation cannot be considered fully inclusive and thus able to play a role in building peace until it is codified as a universal right in national laws and practices”. Such laws and practices will serve to ensure equal access to the education system, which in turn is dependent upon the equal and/or equitable distribution of resources within the system. Together with merit-based selection practices, a carefully constructed curriculum and appropriate language-in-education policies, education can build peace. This is especially important in countries such as those described in this part of the volume, but also in other contexts where the potential for armed conflict is ever present. Furthermore, Dupuy stresses that “building peace through education necessitates a shift away from the authoritarian model of formal schooling that predominates throughout the world”.

Concluding this volume in Part IV Holger Daun discusses the future prospects for comparative and international education in the Nordic countries. Against the background of the historical development of comparative and international education, a broad perspective on current educational issues and the interaction between policy-making and comparative education research, Daun presents a way forward for comparative and international education training and research. The main thrust of Daun’s suggestion for the future is his understanding of the mission of comparative and international education as a critical field of knowledge and knowledge production. Daun suggests, among other things, that the “generation of knowledge in the field needs to be placed in the larger context of philosophical, theoretical and methodological orientations” (See Part I in this volume), encouraging comparativists to focus attention on such important issues as “what learning is and how and why it takes place”. Moreover, Daun maintains that “a sound society can hardly develop and preserve its humane characteristics and humanistic values without continuous “insider criticism” coming from free and autonomous intellectuals”.

This volume closes in the spirit of Daun’s concluding remarks, with the reflections of the volume editors, highlighting some of the significant features of comparative and international education in the Nordic countries, such as these are expressed by the Nordic Voices represented in this volume. The overall idea of this publication is to include chapters written by established researchers combined with chapters by up-and-coming researchers within the field in the Nordic countries. This combination is seen as both a means of informing non-Nordic readers of the present practice and the foreseeable future of Comparative and International Education in our five Nordic countries.

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AFFILIATIONS

Halla B. Holmarsdottir
Faculty of Education and International Studies,
Oslo University College

Mina O'Dowd
Division for Education
Department of Sociology,
Lund University

**PART I: VOICES OF THOSE INVESTIGATING
DISCOURSE, THEORY AND METHOD IN THE
RESEARCH FIELD**

MARCELLA MILANA

2. THE POST-LISBON DISCOURSE ON SKILL MISMATCHES AND COMPETENCE UPGRADING

INTRODUCTION

The European Union is a pooling of sovereignty, thus Member States delegate part of their political power to shared institutions, which have direct responsibility in decision-making and co-decision processes. These are the Council of the European Union, the European Parliament and the European Commission. These institutions, often referred to as the institutional triangle, have a certain influence on policy-making processes occurring at national, regional and local level. In particular the European Parliament, representing the European Union's citizenship, and the Council of the European Union, representing the Member States, jointly adopt new laws on the basis of proposals from the European Commission that represents the European Union as a sovereign body.¹

The institutional triangle, according to the *Treaty establishing the European Community* (2002), acts in accordance with the principle of subsidiarity. This is the principle whereby the European Union does not take action in areas that do not follow within its exclusive competence, unless it is considered necessary for achieving the objectives of the Treaty. However, the restrictions posed by the principle of subsidiarity can be bypassed when Member States agree upon new common objectives by means of intergovernmental activities and agreements.

In the field of education and training, the principle of subsidiary has been de facto circumvented at the Lisbon meeting of the European Council (2000) when the Heads of EU Governments approved the "Lisbon Strategy", also known as the Lisbon Agenda or Lisbon Process.² Thus it is not surprising that the Lisbon Strategy has been identified by Ertl (2006) as a "turning point" in the process of "unionization" of policies, which are formally under the full responsibility of Member States (Nóvoa & deJong-Lambert, 2003).³ On the same premise, Nóvoa argues (2002: 133) that the Lisbon Strategy creates the conditions for the EU to function as "a regulatory ideal that tends to influence, if not organize, national policies". The Strategy gives, in fact, the EU the mandate to develop a common approach that goes beyond existing diversity in national education and training systems.

The aim of this chapter is to examine EU policy-making processes and agenda settings for competence development in the wake of the Lisbon Strategy.⁴ In particular, part I focuses on the EU "regulatory ideal" for competence development that emerges from key policy documents, i.e., working papers, reports, communications,

directives and resolutions, issued by the institutional triangle in the period 2000-2007.⁵ The analysis presented is highly condensed, but it still contains substantial descriptive information. My main argument is that the emerging EU “regulatory ideal” for competence development is grounded on a simplified account of the social problem it aims to address. This account does not pay due consideration, for instance, to possible mismatches between generic requirements for a perfect skills match and specific individual needs for learning and working opportunities. In order to support my argument, part II discusses key contextual factors that characterize the institutional shaping of European labour markets. The investigation, limited to older Members States, is undertaken in the light of existing empirical studies. These studies highlight, among other aspects, the existence of differences in ways in which skills and competences are being assessed and valued in national labour markets. As a result of the analysis, I claim that, by subjugating learning processes to strictly economic principles, the EU’s “regulatory ideal” for competence development may have unanticipated effects on societal wellbeing, which are not being given adequate attention from either a policy or from a research perspective. In the concluding section, the main results are summarised and their implications for comparative and international research discussed.

THE EU “REGULATORY IDEAL” FOR COMPETENCE DEVELOPMENT

In the post-Lisbon phase, national education and training policies are being influenced as never before by EU policy-making processes and agenda settings. With a point of departure in the Lisbon Strategy, the following sections are devoted to a close investigation of key policy texts, issued by the institutional triangle in recent years. These policy documents have, in fact, a strong influence in reshaping current national labour markets and education and training systems in all Member States.

Enhancing economic growth through education and training

In 2000, due to low productivity and the stagnation of economic growth diagnosed at a European level, a 10-year development program, the so-called Lisbon Strategy, was launched by the European Commission. The main goal is to make “the EU the world’s most dynamic and competitive economy” by 2010. The background for the development plan has to be found in ongoing innovation, processes, e.g. product innovation, process innovation, organizational innovation, marketing innovation. These are considered the motor for economic growth and changes in production, with a subsequent importance given to knowledge as a key resource for enhancing economic benefits. A basic assumption for the development plan is that a “dynamic and competitive economy” will drive job creation and ensure sustainable development and social inclusion.

Besides “a radical transformation of the European economy”, at the Lisbon-summit, the Heads of States and Governments of the Member States also agreed upon “a challenging programme for...modernising...education systems”. Hence, a

detailed working plan on *The concrete future objectives of education and training systems* (2002) was adopted by the Council of the European Union, generally referred to as The Education and Training 2010 program (hereafter E&T 2010 program). The plan integrates the Lisbon Strategy with the specific goal of enhancing the quality of education and training systems (hereafter E&T systems) in order for Europe to become the world leader in this field. In so doing, the importance of E&T systems going beyond equipping Europeans for their professional life has been stressed. In particular, there is a concern with creating a basis for personal development for a better life in democratic societies. The program, which integrates all actions undertaken at a European level in the field of education and training⁶ set up three strategic objectives that need to be implemented at both national and European levels. Specifically, objective one is concerned with improving the quality and effectiveness of E&T systems in Europe and has a particular focus on developing skills required for tackling the challenges of the knowledge society.

The analysis of the Lisbon Strategy and the E&T 2010 program discloses a convergent view on a skills shortage in the labour market and a general low-level of competences among the European population, which are impeding EU from becoming “the world’s most dynamic and competitive economy”. Thus the institutional triangle envisages a solution by claiming a high level of skills and competences for all EU citizens through a modernization of European E&T systems. This modernisation process, however, is driven by economic reasons and directed towards the optimisation of the relation between the input – the level of investment in education and training – and the output – the level of skills and competences acquired – so as to ensure an efficient functioning of the labour market. Hence it is characterised by performativity (Lyotard, 1984), and instrumentalism (Hartley, 2006; Harris 2008). It is this claim that frames the EU “regulatory ideal” for competence development and justifies its primary focus on the demand for skills and individual mobility as well as on the recognition of (professional) qualifications and (key) competences for lifelong learning.

The demand for skills and individual mobility

On the premises set up by the Lisbon Strategy and the E&T 2010 program, the Communication of the European Commission Realizing the European Union’s potential: Consolidating and extending the Lisbon strategy (2001: 10) states that

New jobs will remain unfilled unless the European Union invests more in education and skills...and encourages labour force mobility within emerging new European labour markets.

Mobility in relation to the labour force was consequently strengthened, as confirmed by a publication of a Communication on *New European Labour Markets, Open to All, with Access for All* (2001).⁷ The Communication aims at setting up a framework for removing skills barriers as well as tackling the skills gaps, as solutions to these problems are a prerequisite for labour force mobility within the European borders. In particular, the Communication highlights the impact of globalization processes,

technological developments, changes in production as well as social and demographic changes in shaping current European labour markets and stresses that the above-mentioned phenomena

Affect not only the mobility of labour, but also the need for and availability of skills at all levels, including basic and intermediate skills (Commission for the European Communities, 2001: 3-4).

A specific *Action plan for skills and mobility*⁸ was issued in 2002 in order to pursue, among others, the following objects: ensuring that E&T systems become more responsive to a market reflecting an increasingly knowledge-based economy and society,⁹ introducing and consolidating effective competence development strategies for workers;¹⁰ and developing language and cross-cultural skills.¹¹ In the *Action Plan* learning provision is, therefore, identified as the main response to the “mismatches in labour supply and demand”. In this regard, the societal demand for skills is justified in the Action Plan by the fact that a mismatch exists between a demand for skills in the labour market and specific skills available in the labour force. Consequently, the skills deficit in specific economic sectors, such as industry, manufacturing and ICT-related sectors, the skills mismatches in the supply and demand for labour across sectors and regions as well as skill shortages across a range of sectors and occupations, are addressed in the Communication, as threatening factors which “impede the Union’s ability to maximise growth”. In order to tackle these skills deficit, mismatches and shortages, the European Commission argues:

All citizens must have a decent level of initial education and the opportunity to update knowledge and acquire new skills throughout their working lives and beyond (Commission of the European Communities, 2002: 4).

Furthermore, individuals who have not yet entered or are temporarily excluded from the labour market are welcomed by the institutional triangle to take up formal education and vocational training opportunities in a country different from that where they reside, i.e., educational mobility. But it is first and foremost workers, who are expected by the institutional triangle to be mobile, in order to fully explore the “benefits” of the internal market, i.e., occupational mobility. In the latter sense mobility is envisaged as both geographical relocation, which implies the movement of the work force within and between Member States, as well as transfer between jobs or sectors, either within or between geographical borders. In both cases individual mobility is the response to enhancing the internal market’s economic efficiency.

Despite the occupational or educational aim, mobility at a governmental level is assumed to be the primary means to: improve skills levels required by labour markets, achieve full employment, respond to the labour market demand for workers with European outlook and experience, and hence to promote skills development and combat skills shortages and bottlenecks, which act as a brake on the EU economy. At individual level, increased mobility for either occupational or educational purposes is considered by the institutional triangle as a basic right, secured by the

Treaties, which creates new employment opportunities, enhances career opportunities and improves the quality of life in more general terms.

In short, the emphasis by the institutional triangle on the need for all individuals to adjust to a globalising society does not take into account the diverse demand for skills posed by employers and employees, across sectors, occupation and professions. Additionally, individual mobility of European citizens, although addressed by the institutional triangle as a means to increase individual opportunities, it is often limited by legal barriers, language barriers, family circumstances and existing taxes, pensions, social security and immigration policies.

Recognition of (professional qualifications) and (key) competences for lifelong learning

The abovementioned limitations also include difficulties in cross-border recognition of (professional) qualifications. In contrast to other types of limitations, these are among the limitations that have received special attention by the institutional triangle. In fact, in 2005, a Directive on the recognition of professional qualifications¹² was jointly adopted by the Council of the European Union and the European Parliament. This Act establishes rules according to which a Member State must recognise professional qualifications obtained in one or more other Member States, including recognition of skills acquired through professional experience. In the Directive the concept of professional qualification is delimited, however, by a direct reference to regulated professions.¹³ As a consequence it is applicable only to a limited number of professionals who by providing services for the wellbeing of the population are primarily concerned with ensuring a “high level of health and consumer protection”. Furthermore, the offer of professional services is restricted to citizens living within a specific nation-state, inasmuch as their professions are regulated at a national level. Accordingly, the Directive states that the ability to pursue professional activities should be made independent of the context where professionals have acquired their title and qualification, i.e., free provision of services, in order to increase career opportunities for those who possess a professional qualification and to enlarge the audience of potential consumers of intellectual and conceptual services. However, professional qualifications should be recognized as valid in the country of professional practice, in order to acquire the right to pursue a professional activity. Therefore, different aspects related with the legal recognition of qualifications become the central issue of political concern.

In 2005, for instance, the European Commission submitted a Proposal to the European Parliament and the Council of the European Union for a Recommendation on key competences for lifelong learning, on the basis of the extensive production of a working group on “Basic skills, entrepreneurship and foreign languages”.¹⁴ The Recommendation, which was jointly adopted in 2006,¹⁵ defines a competence as

A combination of knowledge, skills and attitudes appropriate to a particular situation (Commission of the European Communities, 2005: 12).

Consequently, key competences are defined as:

Those [competences] which all individuals need for personal fulfilment and development, active citizenship, social inclusion and employment (Commission of the European Communities, 2005: 12).

In spite of such broad definitions, the Recommendation includes a *European framework on key competences for lifelong learning* as a reference tool, identifying eight distinguished key competences that are given priority within the Union: 1) Communication in the mother tongue; 2) Communication in the foreign languages; 3) Mathematical competence and basic competences in science and technology; 4) Digital competence; 5) Learning to learn; 6) Social and civic competences; 7) Sense of initiative and entrepreneurship; and 8) Cultural awareness and expression. These key competences are defined in terms of knowledge, skills and attitudes and are strongly linked to the concept of lifelong learning that, according to the *Council resolution of 27 June on lifelong learning* (2002), must go from pre-school age to that of post-retirement.

Knowledge, skills and attitudes constitute also the basis for a *European qualification framework for lifelong learning* (EQF), published in 2005 by the European Commission and followed up in 2006 by a *Proposal to the European Parliament and the Council for a recommendation establishing the EQF* as a reference tool for making qualifications transparent and transferable within European borders.¹⁶ The Proposal defines qualifications as:

Formal outcome of an assessment and validation process, which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards (Commission of the European Communities, 2006: 16).

Learning outcomes are hereby defined as:

Statements of what a learner knows, understands and is able to do on completion of a learning process and are defined in terms of knowledge, skills and competence (Commission of the European Communities, 2006: 16).

These definitions imply a strict relation between the learning process an individual has been engaged in - either participating in education and vocational training programmes or through experience acquired on the job – and the learning outcomes.

In brief, the identification of a limited number of key competences that should be given priority in the years to come as well as their transposition in objectified learning outcomes, which constitute the basis for a formal recognition of individual's qualifications, does not take into account the possible mismatch in value between governmental and individual levels. At a governmental level the possession of key competences, learning outcomes and qualifications are considered valuable conditions for individuals to enter the labour market and further education and training. Nevertheless the possession of knowledge, skills and competences becomes valuable, at the individual level, only when formally recognized by a specific employer or educational provider.

In light of the analysis presented so far, my main argument is that the set of policy documents, issued by the institutional triangle in the wake of the Lisbon Strategy (2000), creates an EU “regulatory ideal” for competence development that is grounded on a simplified account of the social problem it aims to address. The account is based on four assumptions. First, there is a general bottleneck in the labour market, due to a lack of skills and competences available in the labour force. Second, education and training provision is the only means by which to break this bottleneck as it equips the work force with required skills and competence levels. Third, it is possible to achieve a perfect match between specific skills and competences, provided by the education and training system, and skills and competences recognized as such on the labour market. Fourth, it is also possible to achieve a perfect match between the levels of skills and competences individuals have and the employment that they can acquire. This account of how the institutional triangle will address social problem results in an increased political interest in education and training as the only economic alternative to cope with the technological and structural changes that are affecting European labour markets. However, this mainstream discourse does not account, for instance, for possible mismatches between the discourse influencing the structure of learning and working opportunities at an EU level, the structure for learning and working opportunities at national level and individuals’ preferences. The next part of this chapter will, therefore, focus on available empirical data, at both macro and micro levels, which brings into light contextual factors that characterise the shaping of European labour markets and their relations to skills and competences acquired through education and training.

IS IT THAT SIMPLE? QUESTIONING THE EU “REGULATORY IDEAL”

As already mentioned, the EU “regulatory ideal” for competence development has as its points of departure an assumption regarding a lack of skills and competences among the European labour force and an assumption that this lack should be tackled by improving education and training provision for all. Furthermore the EU “regulatory ideal” assumes the possibility of achieving a perfect match between skills and competences provided by the education and training system and those recognized on the labour market as well as between the levels of skills and competences individuals’ have and the employment they can acquire. This raises an important question: What do we know about current matches and mismatches between demand and supply of skills and competences in Europe? The following sections are devoted to an exploration of available empirical research in this field.

Macro-level data on skills matches and mismatches

A first glance at available aggregate data on skills mismatches seems to substantiate the four assumptions on which the EU “regulatory ideal” for competence development is grounded, at least when we limit the analysis to older Members States. In fact, a comparative study of France, Germany, Italy, Spain and the United

Kingdom (Cedefop, 2003) highlights that employers have benefited from a general rise in the level of education among the population: Employers recruit graduates also for low-skilled jobs as a means to reduce costs of adaptation in due course. Although levels of educational attainment and formal qualifications do not reflect the workers' productive value, these factors are still being seen as "signals" of individual productivity when job-seekers enter the labour market. Similar conclusions are reached by Dekker (2002), with specific reference to the Netherlands with regard to the effects of education and training on upward mobility in different segments of the labour markets. In addition, several studies carried out in different Members States show that the incidence of over-education is overestimated, when undue attention is paid to diversity in the actual ability level or the attitude that workers with a certain level of education have to work. For example, the negative effects of over-education on earnings are lower when measured as a long-term effect. The consequences of over-education for individual workers also seem to compensate for a lack of experience, which for individual workers become a temporary disadvantage that primarily affects the beginning of their labour market career. In this regard job-to-job mobility is being addressed at an individual level as an adjusting mechanism to overcome the negative effect of over-education in the long run.

A closer look at empirical data on skills mismatch also points to remarkable differences between different studies. Empirical findings vary consistently across EU countries. Although these differences might be partially explained by differences in measurement tools, certain evidence seems to suggest the existence of differences in institutional settings of local and national labour markets as a possible cause for severe labour force selection. This is especially evident for ethnic minorities, which are often in a weaker position in the labour market. Their positioning is the most heterogeneous with respect to the country of origin, when compared with people native to the country, who have the same level of education and skills (Battu & Sloane, 2003). Furthermore, analyses of the role of qualifications in shaping transition processes from education to work in Europe highlight the supremacy of qualifications resulting from compulsory schooling and initial vocational training versus continuing education and training, on-the-job training, experience gained in the labour market, etc (Cedefop, 2003).

Micro-level data on skills matches and mismatches

The analysis of cross-sectional data from the European Labour Force Survey (EU-15) on skills matches and mismatches shows that the higher the level of education/ formal qualification, the lower is the risk of unemployment among new entrants in the labour market. Also these results seem to confirm the assumptions that substantiate the EU "regulatory ideal" for competence development. However, the strong correlation between level of education/formal qualification and risk of unemployment does not hold for all countries under investigation. In Southern-European countries, i.e., Italy, Greece and Portugal, higher levels of education/qualification hardly affect the high risk of unemployment in the transition from education to work (Müller & Gangl, 2003). Thus ways in which different European

education and training systems affect labour market entry patterns, via the indirect effect on labour market structures, matters! Against this background, further exploration of the cross-sectional data of the European Labour Force Survey (Gangl, 2003) result in a distinction between three types of institutional arrangements, characterising national labour markets in twelve old EU member states.¹⁷ First, there is the occupational labour market-type where the lack of working experience does not influence the risk of unemployment among new entrants in the labour market.¹⁸ Second, there is a hybrid of occupational and internal labour market-type. In a hybrid labour market type, the risk of unemployment for those with higher levels of education is lower in contrast to lower qualified but more experienced workers, despite low levels of experience.¹⁹ Third, there is the internal labour market-type where better qualified young people face even stronger unemployment risk than those experienced by the lower qualified.²⁰ Additional analysis (de Grip & Wolbers, 2006) focusing on the job quality of low-skilled workers in different EU countries, highlights important differences, which reflect the distinction between occupational and internal labour market-types. The quality of job for low-skilled workers is lowest in countries with occupational labour markets.

In short these analyses show that the effect of education and training on unemployment is the most important factor in distinguishing northern from southern European countries, thus substantiating the existence of differential mechanisms for the formation and recognition of skill and competences currently in place in the old Member States.

Divergences in the interpretation of skills and competences

The above discussion of the European Labour Force Survey points to the existence of differential skill formation and recognition mechanisms. This brings us straight to the issue of divergences in the interpretation of skills and competences, which relates to ways in which labour is organized and valued in different socio-economic and socio-cultural contexts. On this matter Clarke and Winch (2006) provide an empirical analysis of ways of interpreting and assessing skills, i.e., professional qualifications, in countries informed by divergent economic strategies. The United Kingdom is an example of one of the countries featuring high-skill equilibrium, while Germany is representative of the countries securing low-skill equilibrium (Ashton & Green, 1996; Brown et al., 2001). Clarke and Winch's (2006) main results highlight how divergences in official economic values, assigned to skills and related qualifications, are historically and culturally grounded.

Furthermore a vast amount of research on skills and competences in relation to professionalism exists that highlights important divergences in ways skills are being recognized and valued by different social actors, e.g. employers and employees, in different sectors, occupation and professions (cf. Thompson et al. 2000; Korczyński, 2002). These studies shed light, for instance, on existing relations between the assessment of nominal skills, i.e., the only skills being recognized and rewarded by employers, and effective skills, i.e., the combination of invisible or tacit skills, acquired mainly through experience, either before entering the labour market or

on-the-job. Effective skills are often underestimated by employers, thus justifying low labour status and low wages. These skills are, on the contrary, featuring a significant proportion of actual qualifications that allow employees to perform their job. Thus the identification of skills supply-demand mismatches, which is at the core of the EU acclaimed skills shortage, seems to underestimate the surplus of available skills that are not being recognized, hence incorporated into working processes. The underutilization of skills has been identified, on the contrary, as a key feature of different EU labour markets (Krahn & Lowe, 1998; Boothby, 1999). More recently, special attention has been paid to the perception of skills and the developmental needs of current and future employees among different stakeholders within a given sector, i.e., employers, employees, trainers and trainees. National comparisons among these groups identify important differences between employers, employees, trainers and trainees as regards their demand for skills and expectations on how these skills should be acquired. These divergent views question a shared understanding of existing skill shortages (Skinner et al., 2004).

In summary, education and training is without doubt a key resource shaping the match of supply and demand in European labour markets. In fact, individual investments in skills upgrading, competence development and acquisition of professional qualifications is a lifelong cumulative process. It is this process that affects individual fortunes in the labour market. At a micro level, labour market fortunes represent the outcomes of the interplay between opportunity structures, i.e., job availability in a particular occupation, sector or region, which require certain qualifications and reflect individuals' preferences. Employers expect to recruit job applicants, who are the most productive and the least costly for the kind of work required by the job, while job applicants expect to obtain jobs guaranteeing adequate returns of their investments in education and training. Return of investments can be calculated either in term of monetary and non-pecuniary rewards, including job quality and job satisfaction in their current employment or as regards using currently available jobs as stepping stones to better employment at a later stage.

However, contextual factors at a macro level, e.g. labour market conditions, industrial structures and the available skills level among the population, influence the resulting match between supply and demand in European labour markets. The linkage between specific skills and competences acquired through education and training and those recognized by the labour market, i.e., the linkage between individual levels of skills and competences and the employment they obtain, represents an additional key contextual factor, which characterizes the diverse institutional shaping of EU labour markets. All together these contextual factors provoke the contradictory phenomena of skill shortage and under-utilization of skills to occur simultaneously in the European Union.

Against this background I argue that the EU "regulatory ideal" for competence development may have unanticipated effects on societal wellbeing, which are not being given due attention from either a policy or a research perspective. When learning provision, for example, is reduced to an economic instrument for responding to skills deficits in different economic sectors, individual creativity and innovative forces may run the risk of not having a concrete opportunity to emerge. In addition, skilled workers and professionals are addressed as the only actors responsible for

present mismatch between labour supply and demand, when the assumption is made that the supply of decent jobs in EU Member States is adequate, but the work force is unfortunately not adequately skilled to fill them. This assumption may discharge EU Governments from responsibility for direct intervention, aimed at creating new job opportunities and improving general working conditions for all. Furthermore, while new responsibilities for economic growth and development are being delegated from EU Governments to companies and individual citizens, the reshaping of collective contractual relations may be left to the discretion of corporate and private organisations. Moreover, when EU citizens, i.e., constant learners and employable workers, are constructed as free, rational and autonomous agents, who readily apt to adapt to economic principles, then the structural, institutional and dispositional constraints that limit individual agency may be disregarded. Accordingly, EU citizens may be addressed as the only actors responsible for meeting the requirements of societal changes by acquiring “marketable” skills and competences. I do not dispute the fact that individuals have a certain level of agency. Rather I argue that such a level of agency is only rhetorical within the European discourse, when EU citizens are unaware of the dynamic implications of their choices. This is what is likely to happen when learning is considered in terms of an instrumental process the purpose of which is to match supply and demand in EU labour markets.

CONCLUSION

Competence development has become an increasingly accepted imperative for individuals, institutions, governments and intergovernmental institutions. The aim of this chapter was to critically examine policy-making processes and agenda setting for competence development at the EU level, resulting as it does from the intersection between economic and education policy fields. The focus has been on the EU’s “regulatory ideal”, revealed in the set of key policy documents issued by the institutional triangle in the wake of the Lisbon Strategy. My main argument is that the EU “regulatory ideal” for competence development is based on a simplified account of the social problem it aims to address. This simplified account assumes, first, that there is a general bottleneck in the labour market due to a lack of skills and competences in the labour force. Second, it assumes that educational and training provision is the only means to break this bottleneck. Third, this “regulatory ideal” assumes the existence of a perfect match between specific skills provided by the education and training system and skills recognized by the labour market. Fourth, it assumes a perfect match between the levels of skills and competences individuals possess and the jobs they can acquire. In this assessment no recognition is given to the possible mismatches between generic requirements for a perfect skills match, set by Governments, and the specific needs for learning and working opportunities expressed by individual citizens. In the analysis reported in the first section, I highlight the lack of attention given by the institutional triangle to diverse demands for skills posed by different social actors, the existence of obstacles to individual mobility within and between countries, divergences in the value assigned to specific skills, competences and qualifications by Governments, employers, education and training providers and individual citizens.

In support of this argument, special attention was given in the second section to the influence of contextual factors on the resulting outcome of the supply-demand matches in European labour markets. By limiting my analysis to older Member States, I emphasise the manner in which different European education and training systems affect labour market entry patterns in different ways. This is primarily due to the co-existence of different mechanisms for the formation and recognition of skills, competences and qualifications within the European Union. Furthermore national differences exist in the official economic value assigned by employers to skills and related qualifications that are historically and culturally grounded. Lastly, there are important divergences in the manner in which skills are being recognized and valued within and between national borders by different social actors, e.g., employers and employees, in different sectors, occupations and professions.

An enhanced political interest in education and training, dominated by short-term instrumental goals, seems to deny the diverse institutional settings of European labour markets as well as the under-utilization of available skills among the work force, the shortage of adequate paid work, the quality of employment and the unequal distribution of work. Moreover, structural, institutional and dispositional constraints that limit individual agency in the search for learning and working opportunities within the Union are not being given due political attention. Thus my second argument is that the EU “regulatory ideal” for competence development may have unanticipated effects on societal wellbeing, which should be given more attention at both policy and research levels.

Ways in which skills and competences are being assessed and valued by different social actors, for instance, can not be properly tackled at a supranational level only. Mechanisms for the formation and recognition of skills and competences are, in fact, strongly intertwined with contextual factors that regulate the labour market and influence its relations to the education and training system at national and local levels.

How the abovementioned issues are being addressed in the political debate by both supranational agencies, e.g. OECD, the World Bank, the World Health Organization etc, and individual governments should, on the contrary, be given priority in comparative and international education research agendas. Special attention should be given, in particular, to investigate ways in which national, regional and local policies, under the influence of supranational policies, reinterpret skill shortages and underemployment of available skills in different sectors and occupations to support competence development through education and training.

NOTES

¹ The jointly adoption of new laws by the European Parliament and the Council of the European Union occurs through either consultation procedure or co-decision procedure. During the consultation procedure, the Council of the European Union consults the European Parliament for opinion – as well as the following consultative bodies: European Economic and Social Committee and the Committee of the Regions. During the co-decision procedure, the European Parliament shares legislative power with the Council of the European Union. Cf. Treaty establishing the European

THE POST-LISBON DISCOURSE ON SKILL MISMATCHES

- Community (consolidated text), Official Journal C 325 of 24 December 2002, and Framework Agreement on relations between the European Parliament and the Commission, 16th ed., July 2004.
- ² Presidency conclusions Lisbon European Council 23 e 24 March 2000.
- ³ For direct responsibilities of the European Union in the field of education and vocational training see: Treaty establishing the European Community (cit.), Title XI, Ch. 3, Arts. 149-150.
- ⁴ Echoing Dalton et al. (1996), policy making is here interpreted as a strategic and political process in contrast to traditional policy studies, which understand policy making as a rational decision making process.
- ⁵ In this chapter, the policy texts that serve as the central points of reference are primarily legislative instruments. According to the Treaty establishing the European Community (consolidated text, 2002), the legal instruments used by the Council of the European Union and the European Parliament in producing policy are: (1) Regulations; (2) Directives, binding on the Member States to achieve results; (3) Decisions, binding on those to whom they are addressed; (4) Opinions and recommendations, non-binding documents. However, also intergovernmental agreements, such as the Education and Training 2010 program signed in 2001 by the Heads of States and Government of the Member States, are here considered of primary relevance, as they lay the foundation for a stronger political cooperation among Member States.
- ⁶ These actions include vocational education and training through the Copenhagen process and higher education through the Bologna process.
- ⁷ Communication from the Commission to the Council New European Labour Markets, Open to All with Access for All COM (2001) 116 final.
- ⁸ Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions Commission's Action Plan for skills and mobility COM(2002) 72 final.
- ⁹ Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions Commission's Action Plan for skills and mobility COM(2002) 72 final cf. Action No. 1.
- ¹⁰ Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions Commission's Action Plan for skills and mobility COM(2002) 72 final, cf. Actions No. 5, 6, 7 and 8.
- ¹¹ Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions Commission's Action Plan for skills and mobility COM(2002) 72 final, cf. Actions No. 18.
- ¹² Directive of the European Parliament and of the Council on the recognition of professional qualifications 2005/36/EC.
- ¹³ Regulated professions are professional activity or a group of professional activities which can be performed by an individual in possession of a specific professional qualification that gives credit to the use of a professional title "by virtue of legislative, regulatory or administrative provisions". Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions Commission's Action Plan for skills and mobility COM(2002) 72 final, cf. Actions No 19.
- ¹⁴ This working group was later re-named "Key competences".
- ¹⁵ Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning (2006/962/EC).
- ¹⁶ Proposal for a recommendation of the European Parliament and of the Council on the establishment of the European Qualifications Framework for lifelong learning COM(2006) 479 final.
- ¹⁷ The distinction between three types of institutional arrangements has a point of departure in Marsden's (1986) conceptualization of the institutional shaping of European labour markets. According to Marsden, it is possible to distinguish between two polar systems. On the one extreme is the internal labour market-type system, characterized by employment recruitment strategies based on highly discretionary assessment/recognition of job-applicants skills and qualifications; thus prior experience in the labour market is valued as the most reliable account of individual skills and qualification. On the

other extreme is the occupational labour market-type system, where formal qualifications provided by education and training systems are considered reliable indicators of job-applicants' capacity to match a certain job.

¹⁸ The occupational labour market-type is characteristic of Austria, Denmark, Germany and Netherlands.

¹⁹ The hybrid labour market-type is found in Spain and Northern-west countries, i.e., Belgium, France, Ireland and United Kingdom.

²⁰ The internal labour market-type includes Southern-European countries, i.e., Italy, Greece and Portugal.

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AFFILIATION

Marcella Milana
Danish School of Education
Aarhus University

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