

Lifelong learning policies in Europe and Greece. Did “Policy Transfer” take place?

Aggelos Kavasakalis¹
University of Patras

Abstract

The policies related to lifelong learning are policies that are strongly internationalized in their formulation. In this paper, we focus on the “transfer” of policies and related programmes from the European level to the national level. We explore the turning points in the evolution of these policies at the European and national level and the existence and characteristics of possible policy transfer. In the introduction of this paper, we briefly explain the broader context in which lifelong learning policies are developed and then we describe the methodology of research and conclude with the central research question of this paper. In the next part, we discuss and analyze the theoretical notion of “policy transfer”. We are going to discuss its definition, the categories of policy transfer, the types of what is being transferred, and the manner and prerequisites of a possible successful transfer. Then we will focus on international organizations and their role in the promotion of education policies (in our case, lifelong learning policies). The European Union (EU) will be at the centre of this analysis. Finally, we intend to present a timeline of the lifelong learning policies that have been promoted and established during the last decades at two levels: the European and the national (Greek) level. Based on these data, we are going to conduct an initial analysis using the theoretical tool of “policy transfer” and produce conclusions about the individual characteristics of lifelong learning policy transfer between EU and Greek policy subsystems.

Keywords

Policy transfer; lifelong learning policies; EU; Greece.

¹ Assistant Professor, agkav@upatras.gr

1. Introduction

In general, educational policies fulfil specific intentions and are carried out by government bodies on a local, national and international level. It usually gains our interest how these (educational) policies are interpreted and applied, and how they are “transferred” in a complex internationalized environment. Where there was once a national decision-making center there is now an obligation to take supranational rules and procedures into account (Stamelos et. al, 2017).

If we focus on lifelong learning policies, they have been central to the international agenda since 1990. In 1995, the White Paper on Education and Training with the title “Teaching and Learning towards the learning society” is published and it is stated that it is no longer realistic to consider education, working life and retirement as successive phases of life, as the knowledge acquired in the early years is increasingly outstripped. The idea of lifelong learning, by promoting education and training throughout the life cycle, opens new perspectives on how people shape and shape their lives, and how they manage both their work and their leisure time (Commission of the European Communities, 1995). It is also argued that it is important to establish a European area of lifelong learning: “to empower citizens to move freely between learning settings, jobs, regions and countries, making the most of their knowledge and competences, and to meet the goals and ambitions of the European Union and the candidate countries to be more prosperous, inclusive, tolerant and democratic. [And] This development will be facilitated by bringing together within a lifelong learning framework education and training, and important elements of existing European level processes, strategies and plans concerned with youth, employment, social inclusion, and research policy” (European Commission, 2001, p. 3).

In this context the notion (and relative policies) of lifelong learning is established and a definition is necessary: Lifelong learning are all forms of learning activities throughout a person's life, aimed at the acquisition or development of knowledge, skills and competences which contribute to the formation of an integrated personality, to the professional integration and development of the individual, to social cohesion, to the development of the capacity for active participation in society and, more generally, to social, economic and cultural development. It can include formal, non-formal and informal learning (Kavasakalis, 2018).

The relevant policies reflect the changes in technology, information and production and employment structures that have been evolving since the last quarter of the 20th century,

leading (according to many) to a new 'revolution' perhaps on a par with the industrial revolution and the rise of what is called the knowledge society.

The knowledge society requires the independent, highly skilled, and well-connected worker. The internationalization of the economy and production requires telecommunications. Jobs can be performed simultaneously and remotely in low-wage countries. Finally, with developments in science, technology and culture, a new pattern of knowledge and know-how production is emerging, linking specialization, research and creativity with industry and markets (Kavasakalis, 2018). In this context, what is needed is the strengthening of a massified system of education and training with multiple entry points and interconnections to create conditions for different (individual) learning paths that will be continuous from the moment we start compulsory education until the end of our lives! It is in this broader context that lifelong learning policies are developed, relevant policy programmes and internationalized synergies and partnerships are created.

2. Methodology and research question

For this highly internationalized policy issue, we would like to focus on exploring the existence of “policy transfer” from the supranational (in the case of this article, the European) to the national level. This analysis will also provide answers as to the characteristics of a possible policy transfer from the European to the national level in the field of lifelong learning policies.

Thus, the central research question relates to the investigation of the characteristics of policy transfer from the European (EU) to the national (Greece) level in relation to Lifelong learning policies. Specifically, the research question posed in this paper is:

- *What are the characteristics (if any) of policy transfer between the EU and national level in the establishment and development of lifelong learning policies?*

The research will be based on the analysis of policy (official) papers and the turning points in the specific policy axis. Relative official policy documents at European and national level will be analyzed in relation to the production of policy programmes, their central objectives, individual actions and funding and the choices and characteristics of lifelong learning policies. This analysis and comparison will reveal the turning points and the characteristics of policy transfer from European to national level for LLL policies.

3. What is the theoretical tool of Policy Transfer?

3.1 Definition of policy transfer

In this section of the article, we are going to analyse the notion of policy transfer. However, before the definition of the notion, it is necessary to understand that, if our analysis was purely at the macro-level, the distinctive ability of this theoretical view to investigate the processes of the production and implementation of policies could be lost. If our approach was purely at the microscopic level, information about the broader structures and social-political conditions affecting the creation and implementation of policy programmes might also be lost.

Therefore, as Evans and Davies point out, “operating at the meso-level acts as a corrective device for ensuring that policy scientists don’t lose sight of the macro- or micro- level questions, while simultaneously observing that much policy making takes place within multi-layered, self-organizing, inter-organizational networks. Meso-level analysis has become the crucial analytical tool for multi-level, integrative analysis” (Evans and Davies, 1999, p. 363).

A second remark is that the use of “policy transfer” in this article aims merely to facilitate the study of how lifelong learning policies developed at the European level and were then “transferred” to the national level. It is not our intention to produce a theoretical paper about this perspective. We only intend to use this theoretical view to understand and explain the interdependence of lifelong learning policy programmes between the EU and the national (Greek) level.

In the era of late modernity, in the field of education and training, international organisations, supranational formats, specialists, think tanks, interest groups and policy networks are acting to promote common policies in specific policy programmes at different levels, areas and policy subsystems. Daily policies are transferred in the context of the production and implementation of comprehensive reforms and/or individual political practices. In any case, even though research around policy transfer developed particularly between 1990 and 2000, it is currently in a more mature phase. Thus, instead of a distinct research area, the concept of policy transfer is usually utilised for the analysis of broader issues such as Europeanisation, globalisation and political innovations.

“Policy transfer” refers to the process with which different actors adopt policies and specific regulatory projects that have been developed and implemented elsewhere, with the aim of harmonizing or identifying policy objectives. As Sabatier & Jenkins-

Smith (1999, pp. 118-120) say, the best way to think of policy change in a modern society is through "policy subsystems" rather than within a particular governmental organization or a policy programme. This is necessary because the policy-making process in any policy subsystem is extremely complex due to the required understanding of the related laws and regulations, the magnitude of the problem being analysed, and the effect of groups of collective, institutional and individual actors on it. Additionally, a policy subsystem is not considered to be isolated from other policy subsystems, and it is expected to include an intergovernmental dimension. It is therefore argued that the perspective of the policy subsystems is clearly broader than its classic treatment through "strong (policy) triangles" that restricts the focus of the analytical lens to a level of government. Therefore, when one tries to analyse a policy change, they should focus on other actors (individual or collective), apart from the classical actors, from all levels of governance.

Also, in this analysis process of policy production and implementation, according to Stone (2001), there are two points we should pay attention to in the study of policy transfer:

a) The emphasis on the process and the actors involved in it, and b) the different meanings, the different ways of understanding, that could exist during the policy transfer in space and time.

Essentially, our focus should be on the *process* and the *place*:

- *Process*: The emphasis of policy transfer literature is on understanding the process by which policies and practices move from exporter to importer jurisdictions. The focus is on the agents of policy transfer and the processes of decision-making in the importer jurisdictions.
- *Place*: Transfer can take place across time, within countries and across countries. However, relevant literature has evolved from its rather narrow, state-centred roots to cover many more actors and venues (Benson and Jordan, 2011). Transfers can also take place across policy fields (education, economy, data protection laws)².

Following the previous effort of "setting the wider scene", a common definition of policy transfer is necessary at this point. Dolowitz and Marsh in 2000 define that: "[policy

² The logic of privatisation, for example, has been applied from public industries (steel or automobile production) to public services (user-pays in health and education). Similarly, transfer occurs between the private and public sectors. Finally, transfer may be inter-institutional (Stone, 2001).

transfer] is concerned with the process by which knowledge about policies, administrative arrangements, institutions and ideas in one political system (past or present) is used in the development of policies, administrative arrangements, institutions and ideas in another political system” (Dolowitz and Marsh, 2000, p. 5)³.

Evans and Davies (1999) point out that there are four key assumptions for the notion and use of policy transfer:

“First, we argue that policy transfer is a model of policy change. It is therefore, better focused on identifying processes of change than on the measurements of continuity and change, which intra-organizational transfers point toward. Second, it is assumed that policy transfer must seek to identify and classify remarkable phenomena not otherwise explained. Here, it is suggested that the day-to-day diffusion of knowledge, intentional or otherwise, at the micro-level within organizations is not remarkable in the context of policy transfer either in terms of process or of fact. These transfers are better the subject of organizational analysis or management studies. Third, when remarkable intra-organizational transfers occur it is likely to be extra-organizational factors, which are remarkable, rather than the intra-organizational process of transfer. Fourth, there is a presupposition that policy transfer in international dimensions is most likely to be remarkable in falling outside other explanatory frameworks. Here, the argument is supported by much of the prior and contemporary literature which focuses on inter/transnational transfers” (Evans and Davies, 1999, p. 367).

At this point, it is also necessary to note that, if anyone wanted to delve deeper into the theoretical discussion concerning the concept of policy transfer, it would be advisable to explore the differentiations and distinguish it from other related concepts. Indicatively, we mention the concepts: Policy diffusion, Lesson Drawing, Policy convergence etc.

3.2 Different types of policy transfer

Holzinger and Knill (2005, p. 779) argue that, in policy transfer literature, it often remains unclear “where voluntariness ends and where coercion begins” for some form of pressure is bound to be present for policy change to occur. In recognition of this fact, Dolowitz

³ Let us also add that the ideal space for using the concept as an analytical tool, beyond different states, is where there is change and/or development, production, of a new policy programme.

and Marsh (2000) propose a continuum, from voluntary lesson drawing to coercive imposition, rather than a sharp distinction.

For simplicity reasons only, we will proceed to the necessary distinction between the main types of policy transfer: the direct coercive transfer, indirect coercive transfer and voluntary transfer of policy.

3.2.1 Direct coercive policy transfer

The direct coercive policy transfer occurs in cases where the adoption of a specific policy based on examples of its implementation in another context is enforced in the new environment.

The direct imposition of policy transfer on one country by another is rare. However, supra-national institutions often play a key role in coercive policy transfer. For example, supra-national institutions have played a crucial role in the spread of Western monetary policies to Third World countries. International Monetary Fund (IMF) or World Bank loans are much cheaper for these countries, but in return, the IMF will stipulate certain economic policies that have to be implemented if the loan is to be granted. Another example is the action of Trans-national corporations (TNCs). TNCs could also force governments into policy transfer because they usually threaten to take their businesses elsewhere. This potential mobility could force governments to adopt policies capable of attracting industries (Dolowitz and Marsh, 1996).

3.2.2 Indirect coercive policy transfer

Functional interdependence plays a significant role in indirect coercive transfer: “There is little doubt that externalities which result from interdependence, push governments to work together to solve common problems” (Dolowitz and Marsh, 1996, p. 348).

The conditions in the era of knowledge society and technology could also push governments into policy transfer because of the speed with which it forces change. Governments, not knowing how to deal with the issues technological advances create, turn to each other for precedents and ideas. In the same context, the world economy constrains individual governments, and economic pressures can lead to transfer. A country could also be indirectly pushed towards policy transfer if political actors perceive their country as falling behind its neighbours or competitors. The emergence of an international consensus may also act as a push factor.

As it is characteristically underlined: “When the international community defines a problem in a particular way, and even more when a common solution to that problem

has been introduced in several nations, then nations not adopting this definition or solution will face increasing pressure to join the international ‘community’ by implementing similar programmes or policies” (Dolowitz and Marsh, 1996, p. 349).

3.2.3 Voluntary policy transfer

Most researchers suggest that the key catalyst for carrying out voluntary policy transfer is the frustration that could occur during the resolution of a long-time issue. However, the feeling of dissatisfaction is not the only reason behind the voluntary policy transfer. In fact, much of the literature on policy transfer implies that the actors involved in the transfer operate mainly rationally. In this sense, the transfer of a policy, as previously mentioned, is driven by a feeling of frustration. Those involved in the policy process are acting to reduce the possibility of electoral defeat, while also assessing the disadvantages and effects of implementing a policy programme.

At the same time, the process cannot be considered as a purely rational process. In fact, the establishment of a policy may be related to the acquisition of comparative advantage and the power to be committed, with references to existing "problems" and best qualifying "solutions". However, it is most commonly a "disorderly" process in which different policies, solutions and problems need to be combined at the right time to develop a policy programme. Therefore, as Dolowitz and Marsh imply, it is often a messy process in which different policy, solutions, and problem streams need to be combined at the appropriate moment for a policy to develop (Dolowitz & Marsh, 1996).

In addition, as Kingdon suggests, there are three kinds of processes involved in determining the governmental agenda: problems, policies (or solutions), and politics. The first contributors to governmental agendas might be “problems pressing in on the system”. A second contributor “might be a process of gradual accumulation of knowledge and perspectives among the specialists in a given policy area, and the generation of policy proposals by such specialists”. A third influence are political processes—such as public opinion, interest group behaviour, and changes in government or ministers—that may establish new agendas or modify existing ones. In the governmental agenda-setting processes, problems, policies and politics flow independently, but policy change happens on occasions when they can be coupled (Kingdon 1995, pp. 172–179 as cited in Bakir, 2009, pp. 388-389).

3.2.4 Policy transfer different types of continuum

With respect to the continuum of different types of policy transfer Dolowitz and Marsh suggest: “if policy transfer is undertaken during periods of social, political and economic stability within a nation such transfer is likely to be voluntary. However, if there is some form of political crisis, then policy transfer is likely to have some coercive elements. Equally, if there is some form of “global” crisis, such as the economic downturn during the mid-1980s, actors are more likely to feel some pressure to engage in transfer” (Dolowitz and Marsh, 2000, p. 17).

At the same time, Evans and Davies also refer to cases where, although there is some interaction of a political subsystem with external subsystems related to a particular policy issue, there is no policy transfer, as the key components of innovative ideas of a policy programme are either rejected or filtered to such an extent by political actors, so that ultimately, we have the phenomenon of non-transfer policy (Evans and Davies, 1999, p. 382).

3.3 What is being transferred and in what way?

3.3.1 What is being transferred?

During the policy transfer, the object of the transfer is not always the same. For this reason, it is useful to distinguish between hard and soft policy transfer.

“Hard transfer” usually refers to the transfer of policy instruments, institutions and policy programmes between governments and policy subsystem in different countries (Dolowitz, 2004). “Soft transfer” usually refers to the transfer of ideas, norms, ideologies, and sometimes to the transfer of previous negative experiences (Stone, 2004, Dolowitz, Greewold and Marsh, 1999, p. 719). Although this distinction is helpful for any analysis, we have to keep in mind that soft and hard forms of policy transfer often coexist and may very well complement one another (Benson and Jordan, 2011). There is also some differentiation regarding whether the objective of the policy transfer is specialised or not. This relates to the degree of freedom available in the policy framework, both in terms of implementation and in terms of policy-making.

Finally, there are cases related to negative experiences. This, in our opinion, is a key advantage of this theoretical view for others dealing with the subject of policy change, as policy transfer focuses not only on convergence and positive experiences, but also on divergence and the production of ‘negative experiences’, which are considered important for understanding policy transfer.

3.3.2 Different ways of policy transfer

There are different ways of policy transfers. According to Dolowitz and Marsh (2000), these are *copying*, *emulation*, *hybridisation and synthesis*, and *inspiration*.

- "*Copying*" means the immediate and complete transfer of the entire political programme. It occurs when a country adopts a programme in use elsewhere without any changes. The easiest way to prove that copying has occurred is to examine the wording of the legislative bill authorizing a programme;
- "*Emulation*" involves transferring the ideas behind the policy or the policy programme and is generally combined mainly with the categories of "soft transfer". It usually happens when a country: reject(s) copying in every detail, [but] accepts that a particular programme elsewhere provides the best standard for designing legislation at home;
- "*Hybridization and synthesis*" involve combining elements of programmes found in two or more policies at different countries and/or policy sub-systems to develop a policy best-suited to the emulator;
- "*Inspiration*" appears when a policy programme and/or institutional function in a given context and environment (in another policy subsystem) could inspire a policy change, which in its final form is not fundamentally based on the primary material.

Dolowitz and Marsh (2000, p. 9) also argue that one could find in specialised cases of transfer the ways of "non-transfer, failed transfer and transfer of negative experiences". And finally, Evans & Davies (1999, p. 382), adopting a harsh approach, claim that if a policy programme (or a policy idea), during its transfer, is filtered through its local implementation reality and alters some of its key characteristics, then it should be treated as a case of *non-transfer policy*.

3.4 Conditions for successful policy transfer

Scholars have distinguished six conditions that could enhance successful policy transfer, as, in general, it seems that complexity affects the success of policy transfer (negatively) (Dolowitz and Marsch 2000, 1996; Rose, 1993):

- Policy transfer seems to be easier when it comes to reform programmes (projects) with simple goals, rather than programmes with multiple goals.

- It is also clear that the simpler the problem (the policy issue) the more likely a transfer is to take place.
- Also, the more direct and visible the relationship between the problem and the (proposed) "solution", the more likely it is that policy transfer will take place.
- Fourthly, the fewer possible – perceived – side-effects of a policy, the greater the possibility of a transfer.
- On another level, adequate information on how a programme operates in another political environment (subsystem) facilitates policy transfer.
- Finally, the more easily the results of the transferred programme could be foreseen, the easier it was for the transfer of the policy programme to happen.

Beyond these conditions, Rose (1993) makes another important key point: new programmes cannot be constructed on green field sites, and we should keep in mind that they must be introduced into a policy environment dense with past commitment. Additionally, institutional and structural constraints faced by agents transferring policies are crucial. Policy transfer is also dependent upon the transferring political system possessing the political, bureaucratic and economic resources to implement the policy. Finally, since implementation costs money, economic resources and technological abilities are another critical element for successful policy transfer.

3.5 International actors and policy transfer

The relevant literature highlights several categories of actors involved in one way or another in the policy transfer process. Among them we could distinguish between elected officials, political parties, bureaucrats and civil servants, interest groups, supranational organisations, etc. (Dolowitz and Marsh, 2000).

Supranational organisations, developed mainly after WW2, have a role to play in policy transfer. Having considerable financial and human resources, they increase their production of findings, reports and programmes to promote common policy axes. This is how they shape the political agenda at an international-global level. In fact, through international organisations, global funding systems seem to play a significant role in indirect policy transfer.

Among these actors, policy entrepreneurs have an important role to play. They usually have interest in specialised issues. This interest could lead them to the formation of national and/or supranational (policy) networks, which in turn could be a source of

ideas for the adoption of new policies (Rose, 1993). As Bakir argues (2009), policy entrepreneurs are able to “*translate new powerful ideas into policy processes and utilize discourse to change well-established financial policy networks' subjective perceptions and preferences about their interests. It seems that new ideas do not prevail, despite the pressure of ideational entrepreneurs, when domestic institutions, interests, and dominant ideas are clear and aligned toward the status quo, and a policy entrepreneur challenging this stability is absent in the policymaking processes*” (Bakir, 2009, p. 387).

Policy experts (think tanks, NGOs, etc.), while they are usually independent from the government, influence the transfer of ideas-attitudes in relation to a policy issue. Consultancy companies also play a role in policy transfer. However, while effectively pressing for the promotion of certain "models", they usually give little importance to the characteristics and conditions prevailing in the specific policy subsystem in which the transfer is to take place. Therefore, as Stone mentions, they usually promote and/or enforce advice on "best practices" with the logic that “one size fits all”, and this could often lead to inappropriate (unsuccessful) policy transfer (2001, p. 26).

University is also among the actors having a role in policy transfer, since the role of its members in promoting knowledge about a policy issue cannot be ignored. As Stone states, their contribution to policy transfer could be made either directly or indirectly:

“There are at least three dimensions to university involvement in policy transfer. Firstly, academics can be directly involved in transfer. [...] Transnational knowledge elites are often attractive to local governing elites. They represent an authority beyond their borders to which to appeal in reform processes. Governments are sometimes willing to voluntarily listen or defer to the expert authority of academics in that academics and their institutional base are presumed to hold insight, understanding or experience of especial eminence” (Stone, 2001, p. 29).

3.5.1 European Union (EU) and policy transfer

The issue of policy transfer within the European Union (EU) takes on a special dimension and is of great interest, proportional to the specificities that are inherent with EU formation. Among EU member States, everything can be transferred: policy instruments, institutions, policy programmes, ideas, norms, ideologies and even previous negative experiences. Moreover, all kinds of policy transfer also coexist: copy, emulation, hybridisation and synthesis, inspiration. However, if we want to analyse the processes

and interactions that take place during policy transfer in greater depth, things are becoming complex.

Initially, in the EU context, the actors behind the export of a political practice, institutional change or even a simple idea are usually indistinguishable. The analysis also shows that it is not common for a policy to have been created from scratch in Brussels (in a *tabula rasa* situation), without being based on similar experiences or successful practices submitted by specific member countries (nowadays usually Germany or France).

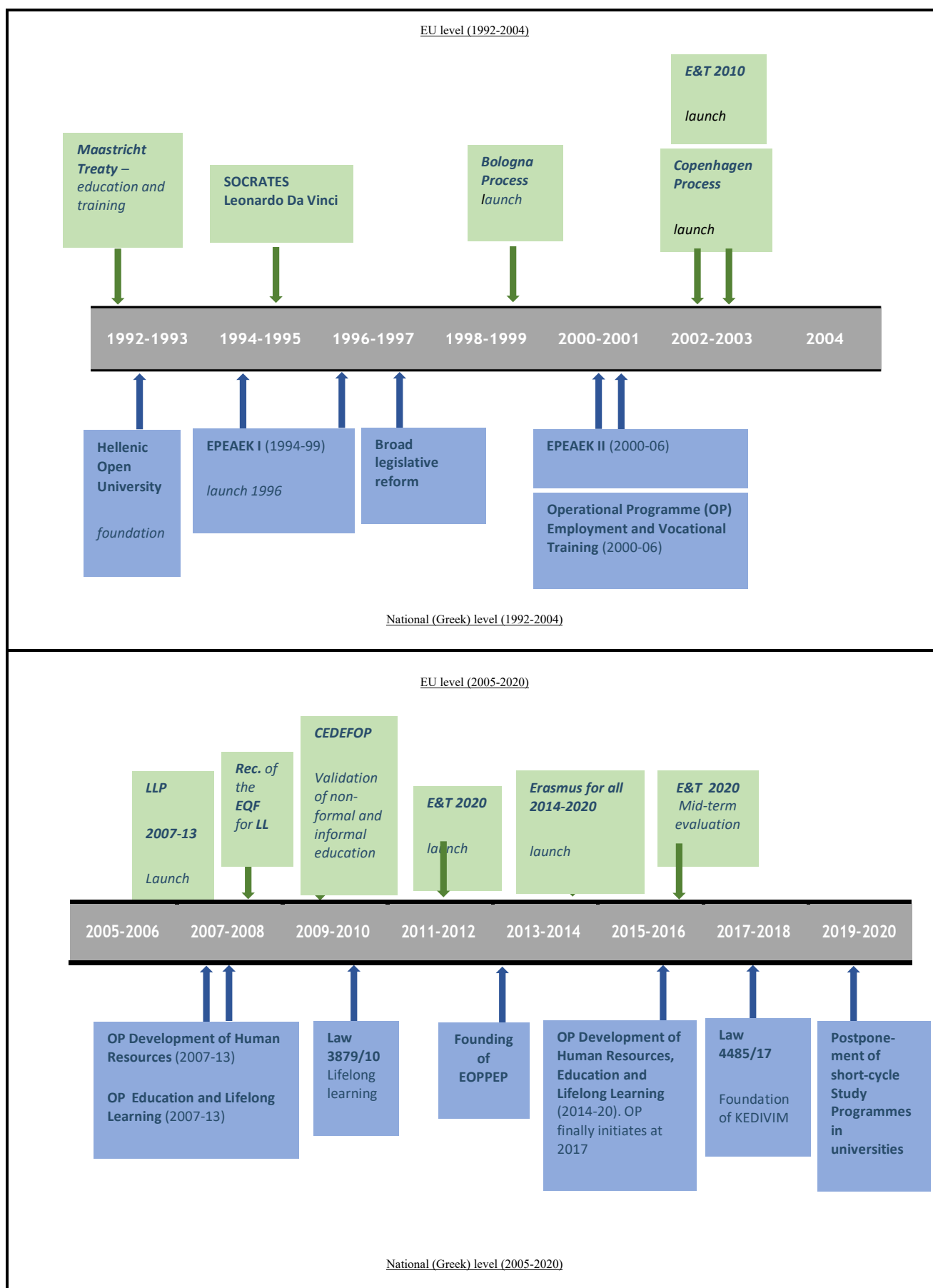
There is also an important role for pressure groups, organised interests and policy entrepreneurs in Brussels in terms of production and, ultimately, possible adoption of policies by the supranational institutions of the EU. In addition, analysts specializing in the operation of the EU are aware of the important role played by *Euro Working Groups* both in the initial formulation of the decisions that the Ministers of the Member States and/or the European Council take, and in the final configuration. In this final formal formulation of policies an analyst could identify interesting changes to which the formulation of an EU policy is subject from the point that it is formed (in the European Commission) to the point that it is finally an official EU policy (i.e. a European Council decision).

Finally, no one should underestimate the extremely important role played by the scientific communities, interest groups, policy networks, or other communities of the EU itself with the considerable funding of research programmes and/or other projects.

4. EU and corresponding Greek policies and programmes in lifelong learning: A timeline analysis

In this section, we intend to present a timeline of the key points of the developments in policies and policy programmes in the field of lifelong learning at the European level (EU) and the National (Greek) level. The start of the period of lifelong learning policies and the interaction between the European and Greek levels, in our opinion, could be none other than 1992, the year of the Maastricht Treaty. The following table shows the timeline of turning points with respect to EU and corresponding Greek policies and programmes in lifelong learning (LLP).

Table 1: Timeline of corresponding EU and Greek LLP



1992-93. Maastricht Treaty – education and training

With the Maastricht Treaty the whole spectrum of social policies is part of the objective of the new EU supranational organisation. Therefore, in the Treaty there is an article dedicated to education (126) and an article on training (127). From the first paragraph of each article, the initial differentiation in the EU's involvement in education and training is evident. In article 126 it is stated that "The Community shall *contribute* to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action, while fully respecting the responsibility of the Member States for the Content of teaching and the organization of education systems and their natural and linguistic diversity", and in the first paragraph of article 127 it is stated that "The Community shall *implement* a vocational training policy that shall support and supplement the action of the Member States, while fully respecting the responsibility of the Member States for the content and organization of vocational Training" (European Union, 1992)⁴. Therefore, since 1992, the EU has placed education and training at the core of its involvement and has gradually entered the era of lifelong learning.

The advent of knowledge society and globalisation seem to be the main driving forces. Due to globalisation and the fastest growing ageing of knowledge because of major technological changes and innovations, it becomes clear that a qualification (degree) is not enough to cover professional needs throughout a lifetime. Thus, the need for lifelong learning is being consolidated; it is education that, by its very object, can only be part of the field of vocational training, in the area where the EU implements its own policies. So, from now on, the (new) EU can formally develop policies and programmes on education, training and ultimately lifelong learning.

1992-93. Foundation of Hellenic Open University

The Hellenic Open University was founded in 1992⁵. Among other things, its mission was the provision of open and distance undergraduate and postgraduate learning and learning programmes through the development and utilisation of appropriate educational material and learning methods. The Hellenic Open University essentially constituted the main carrier of continuing education in Greece in the field of HE

⁴ Highlight does not exist in the official document.

⁵ Law 2083/1992, article 27.

(Vassilopoulos et al., 2020). It should be noted that the admission of its first students began towards the end of the century.

1994-95. Launch of the European programmes SOCRATES and Leonardo Da Vinci

The SOCRATES Programme related to the area of education. The objectives of the Programme were to strengthen the European dimension in all education levels, develop language skills, promote cooperation and mobility, encourage innovation in education and promote equal opportunities in all educational sectors. The central sub-programmes were the: (a) *Comenius* concerning school education, (b) *Lingua* associated with language education at all levels, (c) *Minerva* that promoted open and distance education, (d) *Grundtvig* that promoted Adult education⁶, and, finally, (e) *Erasmus* related to higher European education with three action fields: i) The development of European education policy, ii) the cooperation of universities in the European area, iii) the mobility of students and teaching staff, and the establishment of thematic networks, an action that was innovative in nature (Kavasakalis, 2015).

Leonardo Da Vinci was mainly concerned with the area of vocational education and training. The main objectives of the programme were: (a) to strengthen the competences and skills of workers in Europe, b) to improve quality and access to continuing education and training and to lifelong acquisition skills, to create a versatile workforce, c) to promote and strengthen the offer of vocational training in the process of innovation. The programme's actions were related to mobility, to pilot vocational training programmes and actions for the development of language skills, and to the creation of transnational networks in the field of vocational education and training, alongside with the development of necessary databases (Stamelos et al., 2015).

1994-95. Launch of the National Programme: “Education and Initial Vocational Training” (EPEAEK I)

In Greece, the corresponding national programme in this period was EPEAEK I. The programme's actions and objectives during the period 1994-99, were: (a) to ensure all young people aged 15 to 20 have access to education and vocational training; (b) to strengthen, reform, upgrade and develop education and initial vocational training, so that institutions can gain more flexibility, c) to attract students and take into account recent developments and needs of the market, and d) to improve the infrastructures necessary for the implementation of the above objectives (Ministry of Education, 1994). EPEAEK

⁶ This latter dimension, in the following years, became the core of joint actions (lifelong learning).

I consisted of 4 sub-programmes concerning: a) General and Technical Education, b) Initial Vocational Education, c) Higher Education, and d) organisational and administrative modernisation. It is briefly presented in the next table:

Table 2: *Structure of EPEAEK I⁷*

Sub-programmes	Actions
General and Technical Education	Overhaul of general education programmes. New Lyceum (upper secondary education). Teacher education and other supportive actions. Development of logistical infrastructures.
Initial Vocational Education	Vocational training Institutes (IEK in Greek). Other bodies of initial vocational education and training. Development of logistic infrastructures and educational equipment.
Higher Education	Reform of educational curricula. Postgraduate studies, research and scholarships. Development of logistic infrastructures and educational equipment. Promotion of links between training and production.
Organisational and Administrative Modernisation – Technical support	Modernisation of education management. Technical assistance. Infrastructure and equipment.

1996-97. Broad legislative reform at national (Greek) level

Almost in the same period, a wide legislative educational reform was developed mainly by means of the Law with the title “Unified Lyceum, access in tertiary education, evaluation of educational work and other provisions” (Law 2525/1997). The main areas of the reform are summarised in the next table, as several changes are related to the development of LLP in Greece.

Table 3: *Legislative reforms: key areas⁸*

Uniform framework curriculum in primary and secondary education.	Regulate access to higher/tertiary education. Aims: Broaden access, restructure university curricula, establish new postgraduate programmes, strengthen university libraries, regulate student welfare and evaluation of higher education units.
All-day kindergarten and all-day elementary School.	Promotion of Lifelong education and learning. (a) Hellenic Open University and (b) Elective study programmes (for employees as continuing education and training).

⁷ EPEAK I (1994-99) – republished from Kavasakalis, 2015.

⁸ The data presented in the table resulted from the analysis of the report: Evaluation Committee of Educational Reform Programmes (2000).

Uniform Lyceum (upper secondary education). Aim: General education at high level, development of students' skills, initiative and critical thinking.	Intercultural education.
Establishment of technical professional schools. Aim: Provision to lower secondary school (Gymnasium) graduates of modern vocational education	Development of Initial professional education and training.
Evaluation at the level of School Unit and at the level of teacher.	Actions supporting the educational policy. The Organisation of school buildings, the strengthening of the Centre for the Greek language and the restructuring of the Institute of Continuing Adult education.
<i>New approach to special education issues.</i>	

It appears that the main developments of Law 2525/1997 were related and selected as measures of EPEAEK I and were therefore financed mainly through European funds. Also, regarding LLP policies, a correlation appears between policies and programmes at national level with the respective decisions and developments at the European level in the area of education and training, by the changes provided by law and by the objectives and sub-programmes of EPEAEK I. Finally, as will be seen from the timeline of corresponding developments in the era of LLP at European and national level, there is a gradual interaction and interconnection between these two policy sub-systems.

1998-99. Bologna Process

At a level broader than the EU, the Bologna process begins. 29 Ministers of Education of European countries meet in Bologna and end up in the now known "Bologna Declaration", which mainly concerned the broadening of the cooperation of European universities with the central aim of building the European Higher Education Area (EHEA)⁹. The objectives of this effort, as stated in the Bologna Declaration, were to accept transparent and comparable degrees of university education; to accept a system of the two main courses of study (avoiding the reference to rigorous and specific durations in the courses); the establishment of a system of transferrable teaching units (the ECTS system); the promotion and improvement of the students' (and teachers', researchers', administrative staff's) mobility; the promotion of European cooperation in the field of quality assurance in European higher education; the necessary promotion of the European dimension in higher education while respecting the different culture, language and

⁹ In addition to EU Member States, the associated States were invited, as well as the European Commission, and international organizations such as UNESCO, the OECD and the Council of Europe. Social partners such as representatives of European higher education institutions (EUA and EURASHE), the European student union (nowadays named ESU), researchers and employers' organizations were also invited.

national education systems (Bologna Declaration, 1999). Therefore, if we wanted to group the policy axes that would henceforth be promoted by the Bologna process, they would be:

- Quality;
- Compatible structures, comparable studies, Recognisable Degrees, Transparency;
- Mobility;
- Attractiveness beyond Europe, external dimension, Internalisation;
- Lifelong learning (also later on, alongside student-centred learning);
- Research.

2000-01. Launch of the National Programme: “Education and Initial Vocational Training II” (EPEAEK II)

EPEAEK II begins with the rise of the 21st century, comprising specific priorities and objectives for the promotion and upgrading of education, vocational training and more generally lifelong learning (Stamelos et al., 2015). The next table summarises the priorities and objectives of the 6-year programme.

Table 4: EPEAEK II: Priorities and Objectives

Priorities	Main Objectives
Promoting equal opportunities for access to the labour market for all - and especially for all those who are threatened with social exclusion.	Improvement of education provided through the upgrading of Programme Studies.
Promotion and improvement of education and professional training in the context of lifelong learning.	Broadening the choices of youth and the whole population – through lifelong learning and enhancing the mobility of students – for inclusion in social and production processes.
Development and promotion of entrepreneurship and adaptability of young people.	Promoting equal opportunities and combating social exclusion.
Promoting gender equality and improving women's access to the labour market.	Raising awareness on issues related to environmental protection, health education and sustainable development.
Creation and reinforcement of infrastructures for the implementation of European Social Fund (ESF) measures.	Development of Entrepreneurship.
(Technical assistance – preparation of a new programming period).	Promoting gender equality and equal opportunities in education.

2000-01. Launch of the Operational Programme Employment and Vocational Training (2000-2006)

During the same period, the Operational Programme (OP) "Employment and vocational Training (2000-06)", whose priorities concerning vocational training coincide with the strategic objectives at European level for vocational training and, more generally,

lifelong learning, was launched. The priorities of the national OP are shown in the next table.

At this point, it is worth noting that the interaction and the coincidence of priorities and actions with the corresponding European level fully emerge for this 1st decade of the 21st century through the European Programme Education and Training 2010, although the decision for its inception was delayed till 2003.

Table 5: *OP “Employment and vocational Training (2000-06)”*: Priorities and Objectives

Preventing unemployment through personalised interventions.	Promoting entrepreneurship and the adaptability of the workforce.
Promoting equal opportunities for access to the labour market.	Improving women's access and participation in the labour market.
Strengthening and enhancing the effectiveness and quality of interventions in the labour market.	

2002-03. Launch of the programme “Education & Training 2010”

The programme begins with the corresponding European Commission announcement in November 2003. The programme had four strategic objectives: (a) the implementation of lifelong learning and mobility, (b) improving the quality and effectiveness of education and training, (c) promoting parity, social cohesion and active participation in the Common Market and (d) fostering innovation and creativity, as well as entrepreneurship, at all levels of education and training (Official journal of the European Union, 2004). The programme had eight key areas:

Table 6: *Education & Training 2010: Key Areas*

More equality in education and training.	Modernisation of school education.
Promoting efficiency in education and training.	Modernisation of professional education and training.
Implementation of Lifelong learning.	Modernisation of Higher Education.
Key competences of young people.	Employability.

This European programme has a duration of almost a decade and includes actions implemented in the context of the Copenhagen process for vocational education and Training (VET), as well as actions for European higher education (Bologna Process).

2002-03. Copenhagen Process

During the same period (2002), the Copenhagen Process starts. The aim of this process is to create and promote a European area, complementary to the EHEA, the

European Training Area. The policies developed within the Copenhagen process will address all segments of the population. Qualifications acquired in one country will be recognised throughout Europe, thanks to the use of common frameworks, instruments, tools and homogeneous use of comparable data, thus enhancing the mobility of young people and adults and enhancing the relevance between the training offered and the needs of the labour market (Stamelos & Vassilopoulos, 2013: 78).

2007-08. Lifelong Learning Programme (2007-13)

The main objective of the programme is to contribute through actions covering all the Member States' vocational education and training structures to the employability of European citizens and to strengthening social cohesion in the Member States by bringing education and training activities close. Therefore, LLP aimed to promote high performance, innovation and a European dimension in the systems of the sector; to improve the quality, attractiveness and availability of opportunities for lifelong learning; to strengthen its contribution to social cohesion and awareness of European citizenship; to promote creativity, competitiveness, employability and entrepreneurship; to increase participation in lifelong learning; to promote language learning; to promote cooperation in quality assurance in all areas of education and training in Europe (Official Journal of the European Union, 2006; Stamelos and Vassilopoulos, 2013).

The LLP consisted of four sub-programmes: (a) Comenius for school education, (b) Erasmus, which is the most important on the basis of the projected allocation of funds, for all types of education, c) Leonardo Da Vinci for Initial and continuing vocational education and training, and (d) Grundtvig for Adult Education (Official Journal of the European Union, 2006).

2007-08. Recommendation of the EQF for LLL

In 2008 the Recommendation for the establishment of the European Qualifications Framework provided by all levels of education and training in the context of lifelong learning is published by the European Commission. EQF is a hierarchical record of degrees and learning outcomes with eight reference levels. The aim is to consolidate a single set of national vocational education subsystems and to enhance transparency and recognition of qualifications throughout the European Training Area (Official Journal of the European Union, 2008).

2007-08. Operational Programmes: “Development of Human Resources (2007-13)” and “Education and Lifelong Learning (2007-13)”

At national level at the same time, alongside the corresponding developments at the European level on LLP, the launch of two Operational Programmes (OP) that are in coordination with the corresponding European developments takes place.

Indicatively, in the OP “Development of Human Resources (2007-13)”¹⁰, actions and measures related to:

- The enhancement of the adaptability of human resources aimed at workers and self-employed persons;
- The facilitation of access to employment, addressed to unemployed persons;
- The strengthening of the employment of women, young people, older workers and vulnerable groups of the population;
- The promotion of equal access to the labour market, the reduction of social exclusion and the strengthening of social cohesion;
- The consolidation of the reform in the field of mental health, the development of primary health care and the protection of the public health of the population.

(Ministry of Employment and Social Protection, 2008).

In the OP “Education and Lifelong Learning (2007-13)”¹¹ the following four strategic objectives are mentioned:

- Enhancing the quality of education and promoting social inclusion;
- Upgrading initial vocational training and vocational education systems and linking education to the labour market;
- Enhancing adults’ lifelong learning;
- Strengthening human resources to promote research and innovation.

It is clear even by this brief reference to the two national Operational Programmes that there is a link between developments and the “policy transfer” from the European to the national level in LLP.

2009-10. CEDEFOP –Validation processes of non-formal and informal learning

Continuing the timeline concerning the developments in LLP to highlight any elements of policy transfer in 2009, a series of European guidelines on the issue of validation of non-formal and informal learning, published in combination with

¹⁰ Data from the programme's website: <http://www.epanad.gov.gr/default.asp?pID=14&la=1> (accessed 15.9.2023).

¹¹ Data from the programme's website: http://www.edulll.gr/?page_id=5 (accessed 15.9.2023).

experiences, were exchanged between representatives of more than 20 states in international initiatives undertaken by CEDEFOP¹².

2009-10. Law 3879/2010 – concerning the promotion of lifelong learning in Greece

At the same time, at national level, Law 3879/2010, mainly concerning policies on lifelong learning, was voted. The law defines:

- The bodies and functions of the National Lifelong Learning Network;
- The organisation of the Lifelong Learning management system;
- The institutions for lifelong Learning and Employment Association;
- The National Centre for the certification of lifelong learning structures;
- The operation of Institutes of Vocational Training (IEK) and Vocational Training Centres (KEK);
- The framework of informal learning;
- The National Qualifications Framework.

(Law 3879/2010).

As Vassilopoulos et al. imply, it was the first time that a homogeneous national strategy for LLL, in the vein of European standards, was formed in Greece, since this Law tried to link the educational needs of adults to the demands of the market, recognising the part played by learning outcomes, stressing the need to recognise and certify alternative educational routes, decentralising LLL activities by outsourcing them to municipalities and regions, providing support for socially vulnerable populations, ensuring the quality of educational actions and the establishment of a consistent national framework of qualification recognition and certification (Vassilopoulos et al., 2020).

¹² Indicative on the website of CEDEFOP (<http://www.cedefop.europa.eu/>):

CEDEFOP (2009a). Accreditation and quality assurance in vocational education and training. Luxembourg: Office for Official Publications of the European Communities.

CEDEFOP (2009b). The development of national qualifications frameworks. Luxembourg: Office for Official Publications of the European Communities.

CEDEFOP (2009c). The dynamics of qualifications: Defining and renewing occupational and educational standards. Luxembourg: Office for Official Publications of the European Communities.

CEDEFOP (2009d). The relationship between quality assurance and VET certification in EU Member States, Panorama Series. Luxembourg: Office for Official Publications of the European Communities.

CEDEFOP (2010). Linking Credit Systems and Qualification Frameworks, Research Paper No 5. Luxembourg: Office for Official Publications of the European Communities.

2011-12. Education & Training 2020

At the beginning of the 2nd decade of the 21st century, the new European programme, named “Education and Training 2020” (E&T 2020) begins. A central feature of the new European framework for education and training is the role of lifelong learning, as it is the fundamental principle on which the whole framework is based. It is therefore designed to cover all types of learning -formal, non-formal and informal-, at all levels of education and training -from pre-school and primary education to higher education, vocational education and training, and adult Education- (Official Journal of the European Union, 2009). The central strategic objectives of the programme up to the end of the 2nd decade of the century, as stated in the publication of the programme’s official proposal, were:

- Making lifelong learning and mobility a reality;
- Improving the quality and efficiency of education and training’
- Promoting equity, social cohesion and active citizenship’
- Enhancing creativity and innovation, including entrepreneurship, at all levels of education and training.

(Official Journal of the European Union, 2009).

2013-14. European Programme: Erasmus for all (2014-20)

It is a programme for education, training, youth and Sport for the period 2014-2020 and promotes three types of key actions: (a) Students’ and trainees’ mobility; (b) Cooperation for innovation and good practice; and (c) Support for political reforms.

According to the European Commission, this programme will: (a) increase cohesion and strengthen the lifelong learning approach by linking the activities of supporting formal and non-formal learning throughout the education and training spectrum, (b) It will broaden the possibilities for developing structured cooperation relationships both between the different areas of education and with businesses and other stakeholders, and (c) provide greater flexibility and incentives to the allocation of funds (European Commission, 2011).

2013-14. Foundation of EOPPEP

Although the Joint Ministerial Decision 2351/2011 establishes the National Organization for the Certification of Qualifications and Vocational Guidance (EOPPEP)

through the merger of three entities, the legal form of EOPPEP is specifically defined almost 2 years later, in January 2013 (Law 4115/2013). The central aim of the EOPPEP is to invest in more qualitative, effective and reliable lifelong learning services in Greece for the benefit of citizens, the closer connection of education and training to the needs of the labour market, the upgrading of the professional skills of the workforce, the enhancement of employment prospects and the strengthening of social cohesion (Kavasakalis, 2018).

2015-16. Operational Programme (OP) "Development of Human Resources, Education and Lifelong Learning (2014-20)"

Shortly before the start of 2015 (17.12.2014), the European Commission approved¹³ the national (Greek) OP "Development of human resources, education and lifelong learning 2014-2020". The main objectives of this OP are:

- Development and utilisation of skills and competences of human resources and active social integration in all regions of the country;
- Tackling unemployment and increasing sustainable employment for all;
- Improving the quality and effectiveness of all levels of the education system;
- Developing lifelong learning and improving the relevance of education and training to the labour market¹⁴.

This national OP has major European funding for the Greek education and training area and both the main objectives of the programme and the priority axes and central actions are in coordination with the corresponding European policies and developments in the field of lifelong learning.

2015-16. Education & Training 2020 – Mid-term evaluation

In the middle of the decade, a detailed assessment was made at European level (in addition to the annual monitoring reports on the implementation) of the programme E&T 2020. In this mid-term evaluation, new objectives and targets for the end of the decade were relaunched. The following table shows a summary of the objectives for the end of the programme.

¹³ European Commission (2014). Implementing Decision of the Commission of 17.12.2014 approving certain elements of the operational programme "Development of Human resources, education and lifelong learning". C(2014) 10128 final, Brussels 17.12.2014.

¹⁴ It should be noted that the programme was amended in 2017 (and approved by the Commission) and has been applied in all its dimensions from 2017 onwards.

Table 7: *Education & Training 2020: Intermediate evaluation and targets*

Areas	Targets for 2020
Employment	Employment for the 75% of people in the age of 24-64 years old.
Research-development-innovation	Investments (public and private) at a level of 3% of EU GDP in research and innovation
Climate change and energy	Reduce emissions by 20% (up to 30% if possible) compared to 1990. Use of alternative energy sources up to 20%. Increase by 20% of energy efficiency.
Education	Reduction of early school leaving below 10%. 40% of the age group of 30-34 years with a diploma in higher education.
Poverty and social exclusion	A 20 million reduction in the population below the poverty level or at risk of poverty and social exclusion.

2017-18. *Foundation of Centres of Lifelong learning (KEDIVIM) in the structures of universities.*

Subsequently, the European programme E&K 2020 is gradually implemented at national level and actions are funded through the operational programmes. A significant change is the establishment of the Centres of Lifelong Learning (KEDIVIM) (Law 4485/2017, article 48th). According to the framework provided by the new Law, KEDIVIM may organise educational and/or training programmes in collaboration with HEIs or research institutes, in Greece or abroad, providing distance learning, considering the needs of persons with disabilities and/or special education needs and ensuring electronic access to the programmes to these persons. They grant certificates of non-formal (vocational) education with a usual duration of 2 years (Law 4485/2017; Vassilopoulos et al., 2020).

2019-20. *Postponement of operation of short-cycle Study Programmes in universities*

However, the present government in Greece (after the last national election on July 2019) led to the postponement of operation commencement for the newly introduced two year short-cycle study programmes of vocational education “in view of establishing the legislation of a new framework and given the dire need to correct distortions within the system”¹⁵.

¹⁵ <https://www.esos.gr/arthra/63649/n-kerameos-giati-anasteilame-ta-dietai-programmata-sta-panepistimia> (Accessed, 29.9.2023).

5. Discussion

The analysis of the turning points and the corresponding time-line preceding the previous section, reflect the relationship among broader policies and programmes in the field of lifelong learning between the European and national level. In the light of these findings in this part of the paper we intend to further analyse and discuss upon the research question (let us repeat it):

- *What are the characteristics (if any) of policy transfer between the EU and national level in the establishment and development of lifelong learning policies?*

By the previous analysis, we could conclude that a policy transfer does take place from the European level to the national and sub-national level regarding lifelong learning policies and programmes.

It could not easily be claimed that this policy transfer is a direct coercive one. However, due to the asymmetric forces and the cost calculations in refusing to develop coordinated lifelong learning policies and programmes it is also unlikely that a voluntary policy transfer will take place. The pressure from the political environment and participation in various European processes is real and the costs of a withdrawal are high.

Therefore, we believe that the development of LLP at national level during the last three decades is a result close to an indirect coercive policy transfer, although there is space for flexibility.

In other words, in the spectrum of the different types of policy transfer we should place the formation and implementation of LLP between the indirect coercive and voluntary transfer and closer to the indirect coercive policy transfer.

If we visualise the continuous spectrum of different types of policy transfer as a straight line (such as the continuous spectrum of visible light that is imprinted on a film), then the direct coercive policy transfer is at one end of the spectrum, and at the other end is the voluntary policy transfer. In this range, the policy transfer concerning lifelong learning policies from EU to national (Greek) level would be placed between the indirectly coercive and voluntary policy transfer, but significantly closer to the indirect coercive policy transfer.

In addition, in the policy transfer that takes place for lifelong learning policies between Europe and Greece, another important question is *what has been transferred?*

From the previous timeline analysis about policies and programmes between the two levels it appears that, there is a transfer of:

- Central policy objectives and goals;
- Structures and content of policies and policy programmes and;
- Ideas, values, beliefs and priorities.

Regarding the *ways of policy transfer*, we should mention something that is a broader observation as far as Greek policy behaviour is concerned in relation to European policies. Greek policy sub-systems are usually not (very) active when a European policy is at the stage of formation. Usually, policy sub-systems in Greece become active when a policy programme is in the phase of implementation. Therefore, the usual way that European policies are transferred into the Greek policy system is copying.

This is also the case (copying) for the specific policy area of lifelong learning policies. Furthermore, our (initial) analysis predicts that, at the same time, there is a different way of policy transfer, *the emulation*. Let us further explain this:

Copying seems to take place in relation to the basic parameters and characteristics of the Greek lifelong learning policies, though emulation seems to take place in relation to subordinate characteristics during the implementation of lifelong learning programmes and not during the development of the relevant policies.

6. Conclusion

In this paper we have focused on whether policy transfer takes place on establishment of lifelong learning policies and relative programmes from EU to national (Greek) level during the last three decades (1990-2020). We explored the turning points in the evolution of these policies at the European and national level and the existence and characteristics of possible policy transfer as we have analysed it in the previous sections of the paper.

In conclusion, we could briefly answer the research question of the paper by arguing that:

- A policy transfer does take place from the EU level to the national level regarding lifelong learning policies and programmes.
- The type of policy transfer is an indirect coercive policy transfer (although there is space for flexibility); i.e.: in a spectrum with the different types of policy transfer, the formation and implementation of LLP is placed between the indirect coercive and voluntary transfer and closer to the indirect coercive policy transfer.
- Central policy objectives and goals; structures and content of policies and policy programmes and ideas, values, beliefs and priorities have been transferred.

- As far as the ways of transfer are concerned, there is a combination of copying and emulation.

Finally, one last mention about the initial findings of this paper is necessary. The further comparative analysis on lifelong learning policies at European and national level is, in our opinion, not only necessary because of the broader developments that upgrade the importance of this policy area but also to produce even more refined and in-depth findings and conclusions.

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