

# POLAND CATCHING-UP REGIONS

## STRENGTHENING THE IMPLEMENTATION OF WORK-BASED LEARNING



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# POLAND CATCHING-UP REGIONS

**Strengthening the Implementation of WORK-BASED LEARNING  
IN VOCATIONAL EDUCATION AND TRAINING in the  
Świętokrzyskie Voivodship**



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# What is the Lagging Regions Initiative

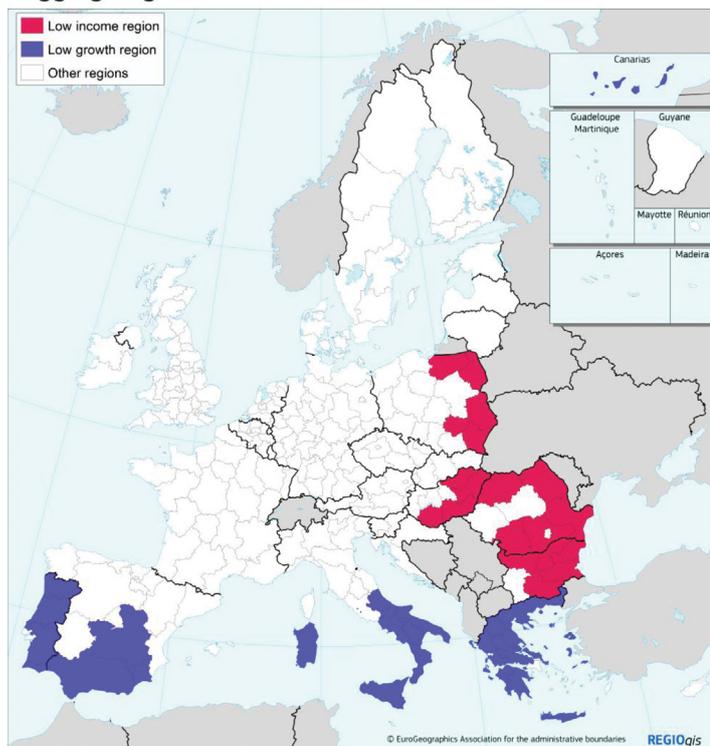
The scope of the EU Cohesion Policy is to narrow development gaps and reduce disparities between Member Countries and regions. To this extent, around €454 billion of ESI (European Structural and Investment) Funds have been allocated to help EU regions become more competitive. However, not all EU regions have been able to fully take advantage of the benefits of EU growth, due to the effects of the 2008 economic crisis and due to a host of structural problems.

To this end, Corina Crețu, the Commissioner for Regional Policy, together with the Task Force for Better Implementation has started the Lagging Regions Initiative. The aim of the Initiative is to identify what holds back growth in less developed regions, and to provide targeted actions for unlocking their growth potential. Thus, these lagging regions will be assisted to involve a broad range of stakeholders (regional and local administrations, educational institutions, business support institutions, SMEs, entrepreneurs, investors, NGOs, IFIs) to help respond to concrete needs they have and to maximize the impact of regional investments. Two types of lagging regions have been identified:

- **LOW GROWTH REGIONS**, which cover the less developed and transition regions that did not converge to the EU average between the years 2000 and 2013 in Member States with a GDP per Capita (PPS) below the EU average in 2013. These include almost all the less developed and transition regions in Greece, Italy, Spain and Portugal
- **LOW INCOME REGIONS**, covering all the regions with a GDP per Capita (PPS) below 50% of the EU average in 2013. This group covers the less developed regions of Bulgaria, Hungary, Poland and Romania.

## Lagging Regions in the EU

### Lagging Regions



Source: DG REGIO

Poland and Romania are the first countries to pilot this initiative, with two regions each – Swietokrzyskie and Podkarpackie in Poland, and North-West and North-East in Romania. In April 2016, Commissioner Crețu together with Marshal Adam Jarubas in Swietokrzyskie and Marshal Wladyslaw Ortyl in Podkarpackie have officially launched the Polish part of the Lagging Regions Initiative called „Catching-up Regions Poland”. The „Catching-up Regions Poland” is an implementation-focused program that aims at providing tailored support to the two Polish regions to boost the impact of EU and private investments in specific areas selected by the two regions.

Over a year of joint work, the World Bank provided hands-on technical assistance and helped coordinate five activities that were selected by the Podkarpackie and Swietokrzyskie regions in coordination with the European Commission, Ministry of Economic Development, and the Bank. The five selected activities were:

- Improving the commercialization of Research & Development (R&D) results generated by public research facilities and enabling better utilization of existing technology transfer centers in the Podkarpackie region.
- Strengthening the vocational education and training system in the Swietokrzyskie region, using best practice examples from around the world and tailoring them to the regional context.
- Activating entrepreneurship in deprived areas in the Podkarpackie and Swietokrzyskie regions.
- Identifying ways to improve conditions for starting a business in the Podkarpackie and Swietokrzyskie regions.
- Supporting the creation of in-house financial instruments in the Podkarpackie region.

This report constitutes one of the outputs of the “Catching-up Regions Poland” work. More outputs, including an overview report and reports for individual activities in both English and Polish can be accessed on the World Bank’s website.



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# Overview

This Report has been prepared as part of the pilot project of the European Commission titled: Catching-up Regions Initiative, implemented in 2016-2017 in selected regions of two European Union states, i.e. Poland and Romania. In Poland, the pilot project included Świętokrzyskie and Podkarpackie regions.<sup>1</sup>

The initiative objective is the identification of economic growth restraints in lagging regions of Europe and – on that basis – provision of advisory assistance consisting of individualised activities (specific for each region), contributing to the reduction of those restraints to improve conditions for investment and economic growth. The scope of advisory activities was determined with participation of the European Commission, regional and central government (in Poland: Marshal Offices of both regions and the Ministry of Economic Development) and the World Bank which also played the role of an entity implementing advisory services.

One of the intervention areas, agreed for the action plan for Podkarpackie, were matters related to the development of regional mechanism of supporting micro, small and medium enterprises in accessing financing (Task no. 4). The subject of advisory services performed by the World Bank experts specifically concerned management of funds allocated in the region under the Regional Operational Programme for 2007-2013 (Podkarpackie ROP 2007-2013) to financial engineering instruments, subject to return following project implementation by financial intermediaries (approximately PLN 135 million). The objective was, therefore, to develop a strategy for this and to choose organisational form and to design operational model of re-engagement of funds, also considering the next programming perspective of EU aid (European Structural and Investment Funds) for 2014-2020, which also includes support of financial instruments.

As part of advisory services, activities leading to incorporation of a limited liability company in Podkarpackie have been taken already. The company is to be called Podkarpacki Fundusz Rozwoju [*Podkarpacki Development Fund - PDF*]<sup>2</sup> and it will take over tasks related to the organisation and management of financial instruments based on funds returned from Podkarpackie ROP 2007-2013 financial instruments and (like in the past) other financing sources.

This document constitutes final report on advisory services performed from November 2016 to March 2017 in the scope described above.

Warsaw, March 2017

<sup>1</sup> [http://ec.europa.eu/regional\\_policy/pl/policy/how/improving-investment/lagging\\_regions/](http://ec.europa.eu/regional_policy/pl/policy/how/improving-investment/lagging_regions/)

<sup>2</sup> Resolution of Podkarpackie Voivodeship Self-government (Sejmik) as of 27 February 2017 on consent to creation of a company under the name: Podkarpacki Fundusz Rozwoju Spółka z ograniczoną odpowiedzialnością [*Podkarpackie Development Fund Limited Liability Company*].

# A

## Introduction

### Global context

**Worldwide, Vocational Education and Training (VET) is receiving increasing attention, particularly as a potentially useful instrument to address high unemployment rates among youth.** By improving the employment and earnings potential of VET graduates, and addressing skill constraints of enterprises, VET is a possible means to improve the alignment of skill supply with demand.

**Across countries, there are substantial differences in the way that VET systems are designed, the share of students that are enrolled in VET compared to those that participate in general education, and the extent to which VET succeeds in preparing graduates for productive careers.** For example, the percentage of upper-secondary level students in VET programs varies from 25% in Hungary, 31% in Greece, and 34% in Spain, to 70% in Austria and 73% in the Czech Republic. Enrollment in Poland is between these extremes and in 2014 was 49% (Eurostat, 2016).

**Despite the substantial differences across countries in the design, scope and performance of VET systems, one concept that appears to be broadly accepted are the benefits of ensuring that students gain practical work experience during their training.** Through Work-Based Learning (WBL), students develop essential skills by participating in activities on enterprise premises, including on-site training and particularly contributing to business operations. When implemented effectively, the technical skills that students acquire are better aligned with actual labour market demand than those that are gained through other learning methods, such as classroom teaching or training in venues that aim to simulate work situations. In addition, it is assumed that the 'real work-floor experience' of WBL equips students with essential non-technical skills (such as the ability to work in teams, problem solving, and communication) to an extent that is not achieved through other learning approaches.<sup>3</sup>

**Various countries, particularly in Europe, have well-established VET systems that historically emphasize integrating WBL in training provision.** In addition

<sup>3</sup>There is not yet a globally agreed definition and grouping of skills. For the purpose of this report, we define 'non-technical skills' as socio-emotional and higher-order cognitive skills that transcend the skill needs of a particular occupation, such as those related to communication, team work, and problem solving.

to countries such as Austria and Switzerland, this includes particularly Germany, where the approach to apprenticeships is considered to be so successful that effective WBL implementation is colloquially referred to as ‘the German model’. In Germany, in 2014, 87% of students in upper-secondary VET engage in apprenticeships, compared to the EU average of 34%. The employment rate of recent VET graduates in Germany is substantially higher than the EU average, i.e. 90% compared to 77%, respectively, in 2015 (CEDEFOP, 2017).

**The relatively sound labour market performance of graduates from VET systems which integrate strong WBL elements, has resulted in a desire to emulate the approach elsewhere.** The European Commission, for example, has highlighted the need to strengthen linkages between VET and the labour market in country specific recommendations, and has developed a set of practical recommendations for Member States on the implementation of WBL (European Commission, 2013). The European Alliance for Apprenticeships (EAfA), a platform bringing together governments, business, social partners, VET providers, and other stakeholders, aims to strengthen cooperation in the field of WBL at the European Union level. Outside of Europe, Singapore and South Korea are examples of countries which have also successfully introduced strong WBL elements in their VET provision. However, in other countries, especially those where traditional VET provision is largely school-based or where the private sector is weak and unorganized, efforts to strengthen WBL in VET are not always immediately successful. In quite a few cases, stakeholders struggle to translate intent into concrete actions that result in the strengthening of WBL, and subsequently, improved employment outcomes of VET graduates.

## Poland’s context and the Catching-Up Regions Initiative’s to strengthen WBL in Świętokrzyskie

**Whereas basic vocational schools in Poland offer programs with a considerable WBL component, training provision in upper-secondary level technical schools remains largely school-based.** Less than 8% of Polish students engage in in-firm activities beyond the obligatory four weeks that students are required by education regulations to spend in firms throughout their training program. In Świętokrzyskie, this share is lower still, at 4.3%. Nearly 8% of students in the region do not meet the regulatory minimum requirement of participating in a four week traineeship at employers’ premises.

**In 2016, the World Bank started providing technical assistance to the self-government of Poland’s Świętokrzyskie region, aimed at strengthening the implementation of WBL in technical schools.** This support was part of a formal programme of collaboration between the Government of Poland, two regional self-governments, the European Commission (EC), and the World Bank, with the aim to improve the impact of EU financing allocated to improve innovation, employment, and economic growth in catching-up regions in Poland.<sup>4</sup> The two regions, Świętokrzyskie and Podkarpackie, participated in the program since structural challenges to economic and employment growth substantially impede their potential to converge toward

<sup>4</sup> The Poland Catching-up Regions Initiative was part of a more extensive “Lagging Regions” project launched by the EC’s DG REGIO, composed of theoretic and practical strands.

European levels. As part of this programme, the World Bank provided technical assistance to the regional governments on a number of priority areas as proposed by the regions. In the Świętokrzyskie region, the regional government selected the strengthening of the implementation of WBL in VET as one of the priority areas.

**This report summarizes the main activities, findings, and outcomes of the collaboration to strengthen WBL in VET in Świętokrzyskie.** During the implementation of the programme, which took place during a ten-month period between May 2016 and March 2017, the World Bank worked closely with the regional self-government, as well as the national government, the European Commission, and other stakeholders, to pave the way for further interventions that will structurally increase the incidence and effectiveness of WBL, including those that will be financed from EU funds. This report summarizes the applied approach; the main findings from the analysis of strengths and weaknesses for WBL implementation in Świętokrzyskie and of international approaches to address key challenges; and the pilot project to strengthen WBL implementation that was designed based on these findings.

Strengthening the Implementation of WORK-BASED LEARNING IN  
VOCATIONAL EDUCATION AND TRAINING in the  
Świętokrzyskie Voivodship

# B Strengthening WBL in Świętokrzyskie: APPROACH

**The approach taken to strengthen WBL implementation in Świętokrzyskie consisted of four phases, of which three were supported by the Catching-Up Regions Initiative.** The first phase comprised the identification of the main strengths and challenges to effective WBL implementation in Świętokrzyskie – and to an extent in Poland as a whole. The second phase included a review of practices applied in other countries to address the main challenges that were identified in the preceding analysis, and an assessment of the replicability of these practices in Świętokrzyskie. During the third phase, a program to pilot interventions to strengthen WBL was designed, and approved to benefit from EC funding. The final phase, implementation of the pilot project, is expected to take place during the period of 2017-2020. The phases of the approach are illustrated in Figure 1 and further described, below.

**Figure 1.** Sequence of activities in the Catching-Up Regions Initiative



**The analysis of strengths and weaknesses of WBL in Świętokrzyskie was based on the 2015 European Commission’s publication ‘20 guiding principles of high-performing apprenticeships and work-based learning’.<sup>5</sup>** The analysis included desk reviews of relevant regulations and literature, as well as extensive consultations with key stakeholders, including representatives of VET providers, firms, and local, regional, and national government officials. This effort resulted in the identification of six ‘key dimensions’ that pose a significant challenge to WBL implementation in Świętokrzyskie, as follows:

1. An appropriate governance and financing framework;
2. Effective mechanisms for stakeholder consultation and coordination;
3. Adequate incentives and capacity of VET providers;
4. Adequate incentives and capacity of firms;
5. Quality assurance (QA) mechanisms for WBL;
6. A facilitating role for Centers for Practical Training (CPT).

**The review of international WBL practices focused on policies and interventions that address the key dimensions that were identified as main challenges in the region.** The analysis of international practices was based on desk reviews and supplemented by a stakeholder study visit to Latvia.<sup>6</sup> In collaboration with regional stakeholders, the relevant practices were subsequently reviewed in terms of replicability in the Polish, and particularly the Świętokrzyskie, context.

**The design of interventions to strengthen WBL in Świętokrzyskie culminated in the preparation of a pilot project proposal that is expected to receive financing through the European Social Fund (ESF).** The project was developed following intensive consultations with national and regional stakeholders, and based on the preceding analyses of key regional challenges and international practices. It is

<sup>5</sup>European Commission, DG Employment. 2015. *High-Performing Apprenticeships and Work-Based Learning - 20 Guiding Principles*.

<sup>6</sup> Latvia was selected for a study visit since it recently started implementing a comprehensive set of interventions to transition from a VET system that is mostly school-based to one that incorporates strong elements of WBL.

expected to be managed by the Świętokrzyskie Marshal Office, and support the piloting of various approaches to strengthening WBL in several municipalities in the region.

**The implementation of the pilot project is scheduled to take place from 2017 to 2020.** (i.e. beyond the scope of the Catching-Up Regions Initiative), and aims to generate lessons learned that can usefully be applied to further strengthen WBL in Świętokrzyskie and other regions of the country, as well as inform policy reforms at the national level.

Strengthening the Implementation of WORK-BASED LEARNING IN VOCATIONAL EDUCATION AND TRAINING in the Świętokrzyskie Voivodship

# C KEY DIMENSIONS for Improved WBL in Świętokrzyskie

**In 2015, the European Commission published guidance on the main aspects that influence the effective delivery of WBL.<sup>7</sup>** The '20 guiding principles' identified in this report (summarized in Textbox 1) are clustered in four categories relating to mechanisms for governance and engagement of social partners; support for companies; the attractiveness of WBL and career guidance for students; and quality assurance in WBL.

## TEXTBOX 1 Guiding Principles for Effective WBL

### A. National Governance and Social Partners' Engagement

- 1** A clear and consistent legal framework which enables all WBL partners to act effectively and guarantee mutual rights and responsibilities.
- 2** A structured, continuous dialogue with a transparent method of coordination and decision making between all WBL partners.
- 3** Strong ownership and implementation of social partners, supported through capacity building.
- 4** Systematic and effective cooperation between VET schools or training centers and companies.
- 5** All WBL partners (companies, VET providers, learners) share costs and benefits.

<sup>7</sup>European Commission, DG Employment. 2015. High-Performing Apprenticeships and Work-Based Learning - 20 Guiding Principles.

## TEXTBOX 1 Guiding Principles for Effective WBL

### B. Support for companies, in particular for SMEs, which participate in WBL

- 6 Support measures are in place that make WBL more attractive and accessible, especially for SMEs.
- 7 Achieving the right balance between skill needs of firms and learning needs of students.
- 8 Particular attention is paid to supporting firms without experience in WBL provision.
- 9 Particular attention is paid to supporting firms offering WBL to disadvantaged learners.
- 10 Companies are motivated and supported to assign qualified trainers and tutors.

### C. Attractiveness of WBL and career guidance

- 11 Pathways between VET and other education and career pathways exist.
- 12 The image of VET and WBL are improved by promoting excellence.
- 13 Sound career guidance is provided to ensure young people make well-founded choices.
- 14 The attractiveness of WBL by raising the quality of VET teachers.
- 15 The attractiveness of VET and WBL is promoted through a broad range of awareness-raising activities.

### D. Quality Assurance in WBL

- 16 A clear framework for quality assurance exists at the system, provider, and company levels, with systematic feedback.
- 17 Training provision is responsive to changing skill needs in companies and society.
- 18 Mutual trust and respect between WBL partners is fostered through regular cooperation.
- 19 The assessment of learning outcomes is fair, valid, and authentic.
- 20 In-firm trainers can access continuous professional development and have adequate working conditions.

Adapted from: European Commission (2015). High-Performing Apprenticeships and Work-Based Learning - 20 Guiding Principles. European Commission, DG Employment.

**The initial '20 principles', combined with a review of relevant policy documentation and intensive stakeholder consultations, were used to identify the priority dimensions that need to be addressed to strengthen WBL implementation in upper-secondary VET in Świętokrzyskie.** Key considerations that informed the identification of the regional priorities were the following:

- Ensuring focus by prioritizing among the '20 principles': criteria applied to prioritize among the dimensions included:
  - A focus on dimensions that are directly and exclusively related to WBL, such as the legal framework for WBL provision and support to firms for WBL implementation;<sup>8</sup>
  - A focus on dimensions that are structurally impeding overall WBL implementation.
- Adding relevant priorities: an important impediment to WBL implementation in Świętokrzyskie that was absent from the original '20 principles' relates to weak incentives and capacity of both VET providers and CPTs. This aspect was thus added as a key priority for the region.

<sup>8</sup> Largely due to the scope of the assistance that was provided under the Catching-Up Regions Initiative, this approach excluded a focus on aspects such as education pathways and career guidance, since these are dimensions that determine the quality of VET provision in general, and are not exclusively related to WBL.

The resulting dimensions that were determined to be key priorities in Świętokrzyskie are the following:

## SIX PRIORITY DIMENSIONS

for Strengthening WBL in Świętokrzyskie:

**Combined, the six dimensions result in a strong focus on facilitating key stakeholders by providing them with the appropriate incentives and capacity to effectively implement WBL.** The requirements for each of these dimensions to contribute appropriately to effective WBL implementation are as follows:

1

### An appropriate governance and financing framework

- The regulatory framework guiding WBL is clear and prescribes sufficiently high minimum criteria for the incidence and duration of WBL, while providing adequate flexibility to providers and firms to implement context-appropriate solutions;
- Monitoring, accountability, and financing mechanisms facilitate effective implementation of WBL.

2

### Effective mechanisms for stakeholder consultation and coordination

- Regional and/or local stakeholder platforms with a broad range of participants to provide strategic directions and identify and address key constraints to WBL implementation, with a focus on strengthening collaboration between VET providers and enterprises;
- Stakeholders coordinate and collaborate to ensure that effective support mechanisms exist to address key constraints of individual stakeholders to engage effectively in WBL.<sup>9</sup>

3

### Adequate incentives and capacity of VET providers

- VET providers have sufficient incentives to transition from school-based VET provision to an increasingly WBL-based VET system;
- VET providers have the technical and financial capacity to increase the incidence, duration, and quality of WBL;

4

### Adequate incentives and capacity of firms

- Firms are aware of the direct and longer term benefits of WBL provision;
- Firms have the capacity to engage in WBL in a manner that maximizes direct firm benefits, and minimizes the costs associated with WBL provision;
- Firms receive appropriate financial incentives and technical assistance to facilitate the provision of high-quality WBL.

5

### Quality assurance mechanisms for WBL

- The achievement of appropriate learning outcomes is assured through clear and effective QA mechanisms, within which the division of responsibilities between VET providers, firms, and students is clearly delineated.

6

### A facilitating role for Centers for Practical Training

- Training provided in CPT is responsive to skill demand, facilitates (rather than competes with) WBL provided in firms, and simulates the working environment to the extent possible.

<sup>9</sup>These support mechanisms would, principally, address key constraints related to the other key dimensions for effective WBL implementation, especially those related to incentives and capacity of firms and VET providers, and quality assurance.

**For each of the key dimensions, specific challenges were identified that constrain effective WBL implementation in Świętokrzyskie.** In some cases, these challenges apply nationally, particularly where they relate to constraints related to the national-level regulatory, governance, and financing framework. These key challenges are summarized in Table 1, below.

**Table 1.** Specific Challenges for WBL Implementation for each Key Dimension in Świętokrzyskie

Focus area	Key challenges
<p><b>1</b> Appropriate governance and financing framework</p>	<ul style="list-style-type: none"> <li>• Low minimum requirements for the duration of in-firm learning</li> <li>• Elements of regulations related to WBL are ambiguous</li> <li>• Accountability mechanisms do not explicitly promote WBL</li> <li>• Financing mechanisms are not effective in providing incentives for WBL</li> <li>• The regulatory environment is unstable and not strongly reinforced by measures that facilitate its implementation</li> </ul>
<p><b>2</b> Effective mechanisms for stakeholder consultation and coordination</p>	<ul style="list-style-type: none"> <li>• A structural mechanism for effective coordination and collaboration among a wider range of stakeholders remains to emerge (existing coordination and collaboration is mostly limited to partnerships between an individual VET provider and enterprise);</li> <li>• Stakeholders lack incentives, capacity, and financing to engage in WBL;</li> <li>• No “WBL champion” has yet emerged to facilitate the establishment of effective consultation and collaboration mechanisms.</li> </ul>
<p><b>3</b> Adequate incentives and capacity of VET providers</p>	<ul style="list-style-type: none"> <li>• VET providers lack the technical capacity, tools, and human resources to engage in effective WBL implementation.</li> <li>• VET providers have concerns about the quality of training that can, at this stage, be provided through WBL.</li> <li>• Schools have incentives to provide practical training through Centers for Practical Training, rather than in firms.</li> <li>• Reform resistance is exacerbated by concerns about the impact of increased WBL on the demand for teaching staff and teachers’ skills.</li> </ul>
<p><b>4</b> Adequate incentives and capacity of firms</p>	<ul style="list-style-type: none"> <li>• Costs associated with engaging in WBL tend to be high, and actual and perceived benefits tend to be low.</li> <li>• Costs are relatively high, since firms tend to lack the capacity and tools to efficiently engage in WBL.</li> <li>• Functional mechanisms to provide financial compensation to firms are largely absent.</li> <li>• Firms do not reap direct benefits from WBL, since students tend not to contribute to production processes.</li> <li>• Employers do not take into account all potential medium and long-term benefits of WBL.</li> <li>• WBL engagement tends to be insufficiently marketed to have a notable impact on a firm’s image.</li> <li>• Enterprises do not necessarily consider VET providers as sound partners.</li> </ul>
<p><b>5</b> Quality assurance mechanisms for WBL</p>	<ul style="list-style-type: none"> <li>• The current QA system for VET does not yet incorporate key recognized good practices to ensure demand-responsiveness of training provision, and is not specifically geared toward assuring the quality of WBL provision.</li> <li>• No regulations or clear guidance is made available to firms and schools to guide them in carrying out sound quality assurance of WBL.</li> </ul>
<p><b>6</b> A facilitating role for Centers for Practical Training (CPT)</p>	<ul style="list-style-type: none"> <li>• The current operating model of CPTs discourages, rather than facilitates, a stronger focus on WBL, since CPTs “compete with” or “crowd-out” in-firm training provision.</li> <li>• Mechanisms to ensure the relevance and demand-responsiveness of training provision in CPTs tend to be weak.</li> </ul>

# D INTERNATIONAL APPROACHES to Strengthening WBL

**Internationally applied approaches to address the majority of key challenges facing Świętokrzyskie were identified and reviewed.<sup>10</sup>** Subsequently, the extent to which these international approaches could serve as useful examples for strengthening WBL in Świętokrzyskie was examined. A summary of this analysis is presented below.

## Effective mechanisms for stakeholder consultation and coordination

**Stakeholder collaboration and coordination mechanisms can be organized in different ways,** taking into account several dimensions such as territorial, sectorial, and organizational considerations. Examples of coordination and collaboration mechanisms include Apprenticeship Offices in Austria, and Local Training Committees in Denmark. The Austrian Apprenticeship Offices are located in the regional Economic Chambers, and are the main contact point for companies for questions and information related to apprenticeships. The Danish Local Training Committees comprise representatives of actors with a stake in demand-responsive VET provision, and among others work to ensure suitable WBL placements for students.

**In Świętokrzyskie, a 'critical mass' of key stakeholders appears to have increased their interest in WBL implementation as a result of the recent engagements in WBL under the Catching-Up Regions Initiative, and would benefit from coordination and collaboration mechanisms.** These stakeholders include VET providers and enterprises, as well as the regional and several local governments. While capacity to implement WBL is still rather low (which reinforces

<sup>10</sup> Considering the regional focus of the Catching-Up Regions Initiative, the review of international approaches focused on interventions that can be taken at the regional level; a review of approaches to strengthen the national-level regulatory, governance, and financing framework was hence not included in this exercise. The review did not include an in-depth review of national practices. Considering the strong WBL elements incorporated in basic vocational education in Poland, a review of the determinant of successful WBL implementation in this VET segment could provide useful insights, in addition to those generated by the review of international practices.

the need for strong coordination and collaboration mechanisms), this development implies that there are stakeholders willing to actively engage in coordination and collaboration activities.

**An effective entity that will lead WBL coordination in Świętokrzyskie is unlikely to emerge unless constraints related to incentives, capacity, and financing are addressed simultaneously.** International practices highlight that strong institutional structures to support individual VET providers and firms are essential to ensure WBL implementation. This is also assumed to be the case in Świętokrzyskie. However, while first steps have been made to pave the way for stakeholder coordination (e.g. through the VET cluster under the Special Economic Zone, or by the Regional Center for Teacher Development), there are scant signs that a 'champion entity' is already emerging to lead WBL coordination activities.

## Adequate incentives and capacity of VET providers

**Analyses carried out by the European Training Foundation (ETF) in a number of countries which made efforts to make the transition from largely school-based to increasingly firm-based training provision, underline a few critical elements that facilitate the process.** While these elements relate to all stakeholders involved in promoting and implementing WBL, they are particularly relevant for effectively engaging VET providers. They include, among others, the need to involve all key stakeholders and ensure that they share the same vision; avoiding competition between the new approach and existing approaches to WBL or other forms of practical learning (such as, in the case of Poland, practical training provision in CPTs); starting with pilot programmes and ensuring that lessons learned can be incorporated in subsequent activities; investing substantial efforts in developing tools and building stakeholder capacity; and actively marketing and communicating the new approach to all key stakeholders.

**In Świętokrzyskie, good practices related to stakeholder engagement and communication, producing tools and building capacity, and upgrading teacher competencies can be introduced at the regional level without the need for national-level reforms.** Some WBL pilots are already taking place in Świętokrzyskie (and in other parts of Poland), and a worthwhile start could be to generate and disseminate their lessons learned to a broader audience. While the challenge of competing approaches and incentives for practical learning cannot be addressed at the regional level alone, as they are likely to require national-level reforms, there appear to be no insurmountable barriers to initiating regional or local initiatives to implement the other identified good practices. What this does require, however, is a champion and a critical mass of stakeholders to manage and engage in collaboration and coordination activities (see also above), as well as sufficient financing and technical capacity to develop tools, provide capacity building activities, and develop processes such as for in-firm training of teachers. Concerning financing, whereas currently EU financing can be applied to fund the proposed activities, this is not a permanent source of funding, and an alternative and sustainable financing mechanism (possibly through a mix of public and private sector contributions) would eventually need to be identified to ensure a consistent service provision.

# Adequate incentives and capacity of firms

**Across Europe, a plethora of varied initiatives are being implemented to incentivize and support firms in offering sound WBL.** Each of the mechanisms aim to address constraints that also apply to firms in Świętokrzyskie. Examples include voluntary sectoral training funds that provide compensation to firms participating in WBL in Austria; training officers providing advice and support to firms who receive students in Norway; and a website for in-company trainers in Germany; and the presentation of awards to firms with special achievements in apprenticeship training in Austria.

**In Świętokrzyskie, firms' constraints related to incentives and capacity would ideally be addressed simultaneously, since they are reinforcing determinants of WBL provision.** On the one hand, weak capacity increases the costs of WBL provision, which reduces firms' incentives to engage in WBL. On the other hand, lacking incentives for WBL provision reduces the motivation of enterprises to build knowledge and capacity for its provision.

**In the short term, funding schemes that are initiated, managed, and financed by the private sector are unlikely to emerge in the region, and hence public or external financing could be considered.** Considering the low degree of organization of the private sector, combined with little confidence in the possibility to implement WBL effectively, the establishment of a financing scheme for WBL is likely to require engagement and funding from other stakeholders, especially government actors. Once trust in the WBL approach increases, and ideally collaboration among firms strengthens, both the appetite and ability of the private sector to manage and sustainably finance WBL can be expected to increase.

**With numerous examples of mechanisms to support firms in WBL implementation available, a pragmatic approach to identifying schemes that are workable within the Świętokrzyskie context, may be advisable.** Considering the weak capacity and financial constraints among all stakeholders, the region might want to opt for approaches that require relatively limited efforts and resources. For example, developing guidance material for WBL implementation and training of workplace instructors, and ensuring their online dissemination, may be a more feasible approach than aiming to establish an extensive and costly network of apprenticeship liaisons. Rewarding firms with strong WBL performance through awards ceremonies could be considered a cost-effective and relatively easy-to-implement approach to generating publicity and to incentivizing firms to increase their engagement in WBL.

## Quality assurance (QA) mechanisms for WBL

**International practices highlight that the quality of WBL provision should be taken into account from the moment when firms are considered for WBL provision, until the final examination of VET graduates.** In particular, QA

considerations come into play when identifying firms for WBL provision; assuring the competences of in-firm tutors and trainers and a sound organization of WBL in firms; identifying learning outcomes incorporated in the curriculum that should be achieved through WBL, as well as assessing these learning outcomes and ensuring that they are adequately covered in (final) examinations.

**Examples of QA and quality improvement measures applied in EU member states with strong WBL systems include a range of both internal and externally executed measures, such as the screening of firms before they engage in WBL; self-evaluation tools for firms; clear training plans; student education portfolios; and WBL monitoring mechanisms that help direct support to firms who most need it.** Specific examples include, among others, formal firm screening and accreditation processes in Belgium; the provision of tools to allow the self-evaluation of firms in Switzerland; the mandatory inclusion of a clear training plan in WBL contracts in Norway; and the development of a 'personal education portfolio' by students in Denmark.

**In Świętokrzyskie, considering the absence of effective oversight and support mechanisms for quality assurance and improvement in WBL, in addition to weaknesses in the overall QA mechanism for VET, an approach that "starts small and expands gradually" appears appropriate.** For example, while external QA measures such as through a formal accreditation mechanism for firms that engage in WBL may eventually be appropriate, there is currently no credible institution that could ensure its implementation, and it might deter firms' willingness to participate in WBL. Similarly, establishing an elaborate WBL support system where 'WBL-advisors' provide relatively intensive tailor-made support to individual firms, may be unfeasible in the short term, given (among others) the financial constraints facing the VET sector. Options that appear more feasible are those that require relatively limited resources and institutional capacity. This could include, for example, the development and online dissemination of tools and templates, including for (self-)evaluation of firm readiness to provide WBL, preparing WBL training plans, and guiding students in the preparation of education portfolios.

## A facilitating role for Centers for Practical Training (CPT)

**Internationally, there are few examples of institutions like the Polish CPTs, which are public entities providing almost exclusively practical training, and that are not fully integrated in individual VET schools.** If not through actual work-floor learning, most practical training options are either an integrated part of individual VET schools, or operated by the private sector. A well-developed system of 'shadow apprenticeships' exists in Austria for students who cannot find regular apprenticeships. In this set-up, a government-run workshop mimics the employer, e.g. by operating quasi-commercially as a restaurant or a furniture production company. This is used to provide apprenticeships to those who cannot find regular apprenticeships. Private sector initiatives include large companies, such as Siemens in Germany, which have workshops separate from actual production facilities where novice apprentices

receive initial training. In some industry sectors in Switzerland, firms jointly own and run a workshop to provide either basic skills needed by all apprentices in the sector, for novices; or specialist skills needed by apprentices but not available in the individual training company. Such a model can be particularly useful to tackle the challenges of apprenticeships in SMEs.

**In many countries, entities that aim to address a lack of appropriate WBL placements in enterprises tend to focus on promoting firm collaboration and supporting students in finding placements, sometimes complemented by practical training provision outside of firms.** In Germany and Austria, in case one firm is unable to ensure that a WBL-student achieves all necessary learning outcomes, initiatives exist to promote collaboration between this firm and other enterprises or with training providers. In Denmark, Centers of Placement, in addition to supporting students in identifying WBL places in firms, provide practical learning to students for whom in-firm placements were not available.

**In Świętokrzyskie, due to the scarcity of WBL places, the provision of practical learning outside of firms (including by CPTs and VET schools) will remain relevant on the short term.** As long as in-firm training opportunities remain limited, practical learning provided by CPTs and VET schools will be the only option for VET students to acquire practical skills, and hence it will be justified to continue offering this opportunity. As WBL incidence and duration increases, the offer of practical learning options through CPTs and schools would be envisaged to (gradually) reduce.

**However, for CPTs to promote (rather than discourage) WBL provision, their operating model needs to substantially move away from a sole focus on practical training provision, to one that emphasizes facilitating WBL.** Depending on capacity, needs, and preferences, a variety of roles of the CPTs can be envisaged, ranging from serving as an intermediary between school and firms, to taking on a more substantive role in the management and organization of WBL, training in-firm instructors, and serving as a location for learning assessments. As this would entail a rather substantial change in operating approach of the CPTs, such changes would require substantial efforts from the CPTs managing authorities (the powiat government), as well as sufficient technical assistance to effectively achieve these changes.

**CPTs are potentially well-placed to play an important role in the strengthening of WBL.** Since CPTs have strong linkages with schools and (to an extent) with enterprises, they could in principle play a strong role in functioning as an intermediary to help identify WBL placements. For example, the practical training instructors at CPTs could not only be engaged in identifying appropriate WBL placements, but also potentially engage in activities such as WBL supervision and the training of in-firm instructors. CPTs could facilitate collaboration among firms in case students need placement in more than one enterprise to acquire all relevant skills through WBL, or help determine the appropriate mix of practical learning that will take place in-firm and in the CPT.

**Moreover, as long as CPTs continue to provide practical training, they should improve the relevance of training through strengthening the engagement of the private sector.** One option to achieve this is to increase the extent to which the private sector determines the scope and content of training provision. While limited information is available on the manner in which CPTs currently determine their training offer, there generally appears to be ample scope to improve demand-

responsiveness. This can be achieved, for example, through formalized mechanisms of consultation between the private sector and CPTs, or by including a strong private sector representation in the oversight and management of CPTs. Another option to strengthen private sector engagement is to increase their involvement in training provision, for example by inviting firm staff to provide 'guest lectures' or to help design student assignments that reflect 'real-life' problem solving activities.

**CPTs can promote the acquisition of essential non-technical skills by increasing the extent to which CPT-training simulates the work environment.** For example, project and team based assignments are likely to contribute to the acquisition of skills related to problem-solving, time management, and team work, which tend to be highly valued on the work floor and are less likely to be acquired when the focus of teaching is solely on equipping students with technical skills.

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# E NEXT STEPS: Recommendations and the Pilot Project to Strengthen WBL in Świętokrzyskie

## GENERAL RECOMMENDATIONS for strengthening WBL in Świętokrzyskie

**The relatively large number and diversity of identified constraints to WBL implementation in Świętokrzyskie raises the question whether WBL is best strengthened through a narrowly targeted or a more comprehensive approach.** A narrowly targeted approach, aiming to address one or two main constraints in depth, could for example entail an exclusive focus on strengthening coordination platforms or financial incentives. A comprehensive approach would aim to simultaneously address, at least to some extent, all or most of the identified key dimensions that require addressing in the region.

**The recommendation for Świętokrzyskie is to apply a comprehensive approach, simultaneously targeting all key dimensions that are intertwined and considered to be reinforcing.** The current context can be described as a 'vicious circle of constraints'. For example, the absence of incentives to engage in WBL at all contributes to a lack of stakeholder willing to establish and maintain effective consultation platforms. The justification for a comprehensive approach is that addressing several key challenges creates the possibility of creating a 'virtuous circle', where progress in one area will boost the positive impact of activities in other areas. For example, increased incentives for WBL participation are expected to boost stakeholders' interest in engaging in consultation platforms, which in turn would strengthen capacity for WBL implementation, which would subsequently further strengthen motivation for WBL.

**A second recommendation is to apply a pragmatic approach,** initially focusing on facilitating WBL participation of those firms, VET providers, and students that show the highest motivation and capacity. The justification of this approach is that it is expected to increase the likelihood of being able to showcase early success. In practice, this approach may imply that in the early stages of WBL implementation, participating stakeholder will be concentrated among larger-size and more competitive firm, better-managed VET providers, and higher performing students for which there is particularly strong demand in the labor market. However, it is also possible that initiatives emerge that include participants who are generally harder to reach, such as groups of smaller-size enterprises, or firms that are willing and able to cater to students with special needs. Particular incentives and assistance could be directed to such initiatives, to ensure that while the support system for WBL implementation develops, mechanisms targeting these groups are incorporated from the start.

**Within the above-described framework, a range of specific recommendations was developed to strengthen the incidence, duration and quality of WBL.** While specifically developed for the Świętokrzyskie region, where employment outcomes and economic dynamism tend to be weaker than in most other regions of Poland, the recommendations are to a substantial extent considered to be applicable nation-wide. The recommendations are summarized below, starting with those that require national-level interventions, and following with those that can be initiated at the regional level.

## Recommendations for interventions at the NATIONAL LEVEL

### **1 Adapt the VET regulatory framework to clarify regulations, increase incentives, and introduce quality assurance mechanisms.**

In particular, revisions are proposed that would:

- *Clarify definitions* and provisions that currently lead to ambiguities and misinterpretations, such as the difference between practical training and vocational practice, which may be superfluous;

- **Increase incentives** for VET providers and their managing bodies to engage in WBL, by increasing the minimum requirements for the share of learning that is to take place in firms;
- Introduce clear mechanisms and procedures to **assure the quality** and relevance of WBL including, among others, related to identifying and assessing learning outcomes.

The above regulatory changes may need to be accompanied, at least in their initial stages, by support measures to VET schools and other stakeholders, to ensure their awareness of the changes as well as their ability to comply with them.

**2 Adapt the accountability and governance framework to increase incentives for engagement in WBL.** In addition to adapting the regulatory framework, further national-level interventions could be considered to strengthen WBL implementation. These could, for example, include introducing performance-based elements in accountability and financing mechanisms, which may need to be preceded by activities to strengthen monitoring and evaluation mechanisms that accurately keep track of performance. Similar to revising the regulatory framework, such reforms may potentially need to be accompanied by support measures to VET providers and other stakeholders, to ensure that they have the desired impact. After all, increased accountability and results-based financing will only have the desired impact when providers are able to meet performance requirements.

## Recommendations for interventions at the REGIONAL LEVEL

**3 Invest in promoting stakeholder coordination, but avoid 'paper tigers'.** Stakeholder coordination and consultation platforms can provide essential direction to individual VET providers and firms in providing relevant VET in general, and effective WBL in particular, including ideally through the development and dissemination of sound regional or local VET strategies that are based on relevant labor market information. However, international experience shows that efforts to establish such mechanism are not always successful: when incentives and capacity are lacking among key stakeholders, such platforms may be short-lived or ineffective. For Świętokrzyskie, the recommendation is to apply a gradual approach to promoting stakeholder coordination, starting with the facilitation of effective coordination and collaboration between a limited number of those stakeholders that show particular and concrete interest in implementing WBL. Building on these experiences, broader and more formalized coordination mechanisms (such as through sector skills councils) can be foreseen in the future.

**4 Address constraints related to incentives and capacity with a well-balanced package of financial and technical support for all key stakeholders.** International practices show that strong support structures are in place in those countries that have a sound WBL implementation. Particularly in contexts where VET provision is still largely school-based, such as in Poland, the availability of effective support is even more important

to facilitate the transition to increased WBL. The following broad principles are recommended to apply when determining the exact scope and nature of support:

- **Include all essential stakeholders:** effective WBL implementation depends on the willingness and capacity of both firms and VET providers and, to a somewhat lesser extent, CPTs and government authorities. Support measures therefore need to include all these stakeholders. For example, ensuring incentives and capacity of VET providers, but not of firms (or vice versa), is unlikely to generate the desired impact.
- **Provide a well-balanced mix of technical and financial support:** technical support builds capacity and reduces the (transaction) costs of implementing WBL; financial support further improves incentives for participation in WBL.
- **Tailor technical support to stakeholder needs:** sound stakeholder consultations should inform both the scope and the delivery methods of the technical support that will be offered.
- **When determining the level of financial support, consider that stakeholders may require more substantial financial support during the 'transition period' than in a mature WBL system,** since:
  - In a mature WBL system, VET providers will have adjusted their human resource planning to ensure that sufficient staff can allocate time to supporting WBL. During the transition period, providers may need to (temporarily) recruit additional staff with the appropriate skills.
  - Both the real and perceived cost-benefit ratio of firms participating in WBL is higher than in a mature system, because (i) it may take some time for firms to acknowledge the long-term benefits of WBL; (ii) the actual immediate benefits of WBL for firms may initially be relatively low, as firms may only gradually learn how to ensure the contribution of WBL-students in firms' production processes; (iii) costs of WBL provision will initially be relatively high, as it will take some time for firms to develop the most efficient way to guide students during their WBL experience.
- **Consider the broader implications of transitioning from a school-based system for VET providers.** Substantially strengthening the provision of VET through WBL comprises a significant systems' change, with potentially relatively strong implications for, particularly, VET schools and CPTs. Support provided should acknowledge the need for appropriate change management which could include, for example, reallocating and training teaching staff so that they can be effectively engaged in the process of WBL implementation, and training teaching staff to ensure that they are up to date with the production processes and skills requirements in firms that offer WBL places.

## **5 Support stakeholders with the implementation of sound quality assurance mechanisms without creating additional barriers for engaging in WBL.**

Feasible and appropriate QA approaches are considered to be those that can be implemented taking into account the limited capacity and resources of stakeholders, and that are not so stringent and time-consuming that they discourage stakeholders (especially enterprises) from engaging in WBL. Over time, as capacity and incentives for WBL implementation increase among stakeholders, QA mechanisms can be added or strengthened to gradually arrive at an overall system that inspires a sufficient level of confidence among all relevant actors about the quality and relevance of WBL (and overall VET) provision.

# 6

## **Adapt the operating model of Centers of Practical Training so that they facilitate WBL and provide more demand-responsive training.**

A revised operating model of CPTs that includes objectives, procedures, and incentives that are geared to promoting in-firm training and applying workplace simulations only when needed, and which more explicitly and effectively takes into account the need to provide demand-response skill development activities (for example by giving the private sector a stronger role in their management), could greatly improve the extent to which these actors contribute to the acquisition of relevant skills by VET students. An option to consider would be to engage CPTs in coordination or capacity building activities that are described above.

## **The Świętokrzyskie PILOT PROJECT to Strengthen WBL**

**Supported by the TA provided under the Catching-Up Regions Initiative, the Marshal Office of the Świętokrzyskie voivodship, in collaboration with key stakeholders, designed a pilot project to strengthen WBL.** The project is expected to be financed by the ESF in the framework of the Operational Program Knowledge Education Development (OP KED) under the Social Innovation priority axis, and will be implemented during the period 2017-2020.

**The project's objective is to pilot a variety of approaches to promote the incidence, duration, and quality of WBL, based on the knowledge generated through the Catching-Up Regions Initiative.** The project will target WBL provision to students of upper-secondary technical schools as an integral part of the formal VET program, with the ultimate objective to improve the employability of VET graduates. In addition to strengthening VET implementation in Świętokrzyskie during the project implementation period, the project is expected to generate lessons learned that will serve to inform further interventions to strengthen WBL after 2020, both in Świętokrzyskie and in other regions in Poland. The manner in which the pilot project will address the various key dimensions that are described in the earlier section of this report, are summarized in Table 2, below.

**Under the project, a grant mechanism will be established to provide financing to regional stakeholders who develop viable pilot approaches for WBL implementation, which meet the minimum criteria, established for project implementation.** Among others, these criteria concern requirements for the identification of the actors who will be involved in grant implementation (firms, schools, and supervising authorities); the establishment of clear and adequate coordination mechanisms among the implementing partners; the number of hours that students will engage in in-firm learning activities; the clear identification of WBL learning outcomes; and the application of quality assurance mechanisms.

**The pilot project will address identified constraints related to capacity and incentives through a combination of financial support and technical assistance.** Eligible expenditures as part of the financial support include, among others, the financing of in-firm instructors, training materials, and work stations; work attire, health and safety training, transport, and remuneration for students; and a flat

rate compensation per WBL-student to VET providers. Technical assistance financed through the pilot project will be provided by external experts contracted by the Marshal Office, and will include support to project beneficiaries on, among others, appropriate coordination mechanisms between schools and firms; the development of templates and guidance material for WBL agreements and quality assurance mechanisms; and the monitoring of WBL processes and outcomes. Technical assistance will also be provided to the Marshal Office to strengthen its ability to manage and provide oversight to project implementation.

**Several aspects of the design of the pilot project will help to ensure that the lessons learned generated through the pilots can feed into future activities to strengthen WBL in Świętokrzyskie and beyond.**

First, the templates and other guidance material that will be developed through the project are expected to facilitate stakeholders who implement WBL beyond the direct grant beneficiaries. Second, with the technical support that will be procured by the Marshal Office, a sound monitoring and evaluation mechanism will ensure that the strengths and weaknesses of the various implemented approaches are recorded, and can be readily disseminated. Third, to lay the groundwork for the establishment of a structural coordination and support mechanism to facilitate WBL implementation in the future, relevant stakeholders beyond the direct grant beneficiaries will be invited to engage in the implementation and monitoring of the pilot project; these may include for example the Regional Center for Teacher Development, the VET cluster of the regional Special Economic Zone, and the regional labour offices, depending on these institutions' preferences and capacity.

**Table 2.** Addressing Key Dimensions for Strengthening WBL through the Pilot Project

Key Dimension	Activities under the pilot project
1 Appropriate governance and financing framework	As the pilot project is a regional project, it will not address constraints that require national-level interventions
2 Effective mechanisms for stakeholder consultation and coordination	<ul style="list-style-type: none"> <li>• Initiate collaboration and coordination between participating VET providers and firms, associated local governments, and the regional government</li> <li>• Engage additional stakeholders who may play a leading role in coordination and consultation activities in the future</li> <li>• Recording of lessons learned and good practices.</li> </ul>
3 Adequate incentives and capacity of VET providers	<ul style="list-style-type: none"> <li>• Financing for WBL implementation</li> <li>• Capacity building on WBL implementation, e.g. on interacting with firms, adapting curricula to incorporate WBL, monitoring WBL placements, and teacher development.</li> <li>• Development of templates and guidance material on critical elements of WBL implementation;</li> <li>• Recording of lessons learned and good practices.</li> </ul>
4 Adequate incentives and capacity of firms	<ul style="list-style-type: none"> <li>• Financing for WBL implementation</li> <li>• Capacity building on WBL implementation, e.g. on interacting with schools, engaging students in production processes, in-firm instructor training, and quality assurance</li> <li>• Development of templates and guidance material on critical elements of WBL implementation;</li> <li>• Recording of lessons learned and good practices.</li> </ul>
5 Quality assurance mechanisms for WBL	<ul style="list-style-type: none"> <li>• Capacity building on QA for firms and schools</li> <li>• Development of templates and guidance material on relevant QA approaches</li> <li>• Recording of lessons learned and good practices.</li> </ul>
6 A facilitating role for Centers for Practical Training (CPT)	<ul style="list-style-type: none"> <li>• Capacity building of CPTs which participate in the pilot project, particularly on CPTs' potential facilitating role in WBL implementation, and aligning CPT training provision with WBL activities and, more generally, labor demand.</li> <li>• Recording of lessons learned and good practices.</li> </ul>

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