
Exploiting the Potential of the Open Method of Coordination in Slovenian Education Policy*

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Abstract: The open method of coordination (OMC) holds great potential to improve various (qualitative and quantitative) aspects of education policies in EU member states. Due to its soft/non-obligatory way of influencing policy, it is particularly interesting to investigate to what extent its potential is actually put to good use in member states and which factors determine whether member states actually achieve the Lisbon Strategy's goals. Bearing in mind the lack of empirical evidence for the OMC's influence on national education policies, and considering the theoretical assumptions of soft modes of governance, Europeanisation processes and policy learning, this article identifies the potential of the OMC, and analyses its (possible) impact on education policy in Slovenia. Here, the article limits itself to the lifelong learning policy and seeks to discover the extent to which the OMC's potential in this regard is taken advantage of in Slovenia. The article concludes that, although relatively good results are visible in National/EU Progress Reports, its full potential has not been exploited. The authors explain that good quantitative goals are achievable for member states even without respecting the qualitative goals related to good governance. In order to make use of all of the potential, more knowledge about the OMC in Slovenia would be required.

Keywords: open method of coordination, education policy, Slovenia, European Union, good governance

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Introduction

The open method of coordination (OMC) is a relatively new method of 'soft' (i.e. non-obligatory) decision-making introduced within the European Union (EU). It involves voluntary cooperation between EU member states and EU institu-

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tions on those policy fields in which treaties establishing European Communities allocate few if any competencies for direct decision making within the framework of EU institutions [Dehousse 2002: 5]. One such policy field is education. Education is an area of EU policy in which the harmonisation of national laws and regulations with the EU's legislation is not required. In accordance with the Amsterdam Treaty, the EU's primary aim in education has been to contribute to the development of high quality education by encouraging cooperation between member states and by supporting and complementing their actions, whilst fully respecting the responsibility of member states to create their own curriculum content, organise their own education systems, and manage domestic cultural and linguistic diversity. Nevertheless, at the EU level we can find various declarations¹ and other documents that refer to education. Within the EU activities in the field of education that represent an area of cooperation (on a voluntary basis) among member states, and it was the OMC that laid the foundations for cooperation among EU member states. By introducing the OMC, the Lisbon Strategy established a common European education space in which (hitherto completely heterogeneous) education systems could connect to create a uniform base for life-long learning [Gornitzka 2005].

The growing political stress on the (use of) OMC, coupled with the widening diversity of the processes it involves, has resulted in many contrary judgments concerning the OMC—not only by (EU) policy actors but also by researchers and academics [Zeitlin 2005a: 22]. According to Zeitlin [2005a: 19], no other development within European integration has triggered as much interest and debate as the OMC. Radaelli [2003: 16] and many others [Alexiadou 2007; Chalmers and Lodge 2003; Goetschy 2005; Kröger 2006]² have asserted that, while the OMC is the subject of much theoretical debate, it is too soon to offer a unanimous and exhaustive estimation of its effects in practice, primarily owing to the lack of qualitative empirical analysis of the OMC's influence on national beliefs, decisions, and policies. In addition, there have also been debates about the relationship between its advantages and drawbacks and on the question of whether the method *de facto* works within and between the member states [Alexiadou 2007; Chalmers and Lodge 2003; Goetschy 2005; Kröger 2006; Radaelli 2003]. At issue here is the readiness and capability of member states to decide and initiate the kind of cooperation that would require bigger obligations from them and would enable comparisons of the development levels of respective member states. The OMC's potential is ready to be put to good use. But an essential question remains: how to achieve a better application of the method (thus far used unsatisfactorily)

¹ The declaration expresses general positions on particular issues and fundamental questions in distinct policy. It is not a legally binding document, but represents only a general direction for future actions.

² Zeitlin [2005a: 26] also warns of the lack of empirical research and states that some research work is based on deficient and out-of-date data to which authors have applied their own theoretical and normative assumptions.

without undermining its ambitious goals of greater efficiency, safety, better quality decisions, improved implementation, and enhanced democratic legitimacy?

Exploiting the various dimensions of the OMC's potential is important in two ways: first, for achieving the quantitative goals of the Lisbon Strategy; and second, for its qualitative goals, such as the greater convergence of education systems and a greater degree of democratic governance in the EU. The OMC's potential in the area of education policy reveals considerable capacity for strengthening horizontal and hierarchical interactions and for achieving the future convergence of decisions and actions. Applied appropriately the OMC should enable the EU's future education policy agenda to become deeper and broader, while upholding the principle of subsidiarity in relation to the Commission and other European agencies as important OMC process initiators. Taking into account the bottom-up approach, it is particularly important to exploit the OMC's potential in each member state since all member states (should) contribute to the quantitative and qualitative dimensions of the common EU educational space. Only with contributions from all member states can the EU become 'the most competitive knowledge-based society in the world' (as defined in the *Presidency Conclusions* [European Council 2000]).

Taking the above mentioned theoretical presumptions into consideration, especially Zeitlin's [2005a: 26] warning about the need for more qualitative empirical research, the main aim of this article is to analyse to what extent the OMC is being put to its best possible use in Slovenia. In this respect, the article will conduct a systematic review of its de facto reception in the field of education policy and will limit itself to examining the lifelong learning policy. The article will draw on theoretical arguments about soft modes of governance, Europeanisation processes, and policy learning, and on the opinions of actors dealing with the OMC in education at national and EU levels.

The article is based on an analysis of Slovenian legislation and other official documents that steer education policy in Slovenia (e.g. the National Strategy of Lifelong Learning, National Reports on the Implementation of the Education and Training 2010 Work Programme³), EU official documents in the field of education policy (e.g. Council Conclusions on a strategic framework for European cooperation in education and training), and semi-structured interviews conducted with

³ Some scholars [Büchs 2003; Gornitzka 2006; Jacobsson 2007] warn that member states in their National Progress Reports can only express their symbolic compliance with EU education policy and goals. From this perspective the relevance and neutrality of the data presented in the National Progress Reports can be considered doubtful. Taking into account these observations, we balanced these (possibly) biased data with an analysis of Slovenia's participation in clusters and peer learning activities, and with an analysis of the EU indicators and benchmarks in the European Commission's benchmarks in the European Commission's progress reports (*Progress Towards the Lisbon Objectives in Education and Training—Indicators and Benchmarks* [European Commission 2004, 2005, 2006, 2007, 2008, 2009]).

relevant officials in the Slovenian Ministry of Education and Sport (at the Education Development Office and EU Department) from 2008 to 2010 (four interviews), at the Slovenian Permanent Representation in Brussels (one interview), and with relevant officials at the Directorate General for Education and Culture in Brussels (ten interviews) in January 2010. Data gathered through semi-structured interviews present an additional source of information and were used only to clarify those open issues that we were unable to identify from our analyses of official documents.

The article is structured as follows. The first section describes the origin and key features of the OMC, with a special emphasis on the OMC in the field of education. The second section explores what potential the OMC holds. Based on empirical evidence, the third section analyses the appropriate application of the OMC's potential in the field of Slovenian education policy. Finally, the fourth section synthesises the main findings.

The various faces of the Open Method of Coordination

Since its introduction, the OMC has spawned a wide debate among scholars and has so far been investigated and explored as a new mode of governance [Armstrong 2006a; Chalmers and Lodge 2003; Jones 2007; Rodrigues 2001], as an instrument for reducing the EU's democratic deficit [Armstrong 2006a; Duina and Raunio 2006; Smismans 2008; Syrpis 2002], as part of Europeanisation processes [Alexiadou 2007; Büchs 2008; Heidenreich and Bischoff 2008; Jacobsson 2003; Munkholm and Kjølsen Olsen 2009; Sacchi 2004], and finally as a policy learning process [de la Porte, Pochet and Room 2001; Kan 2005; Radaelli 2004; Rose 2002]. The OMC is a technique that operates somewhat like the OECD; since the early 1960s this Paris-based club of western industrialised nations has served as a forum within which its members can appraise and compare each other's ways of developing public policies [Wallace: 98]. According to Wallace [2010: 99], three factors have served to emphasise policy coordination as a technique: (1) the move to a form of EMU with a single monetary policy but only a coordinated macroeconomic policy; (2) the Lisbon Strategy, which specifically identified and elevated the OMC as a distinctive policy technique that uses soft policy incentives to shape behaviour instead of hard, often legally binding, methods of compliance; in those fields of socioeconomic policy-making where the EU lacked—and was unlikely to gain—strong delegated policy powers; (3) the increasing recognition of cross-country variations in policy and economic performance, which has made it harder to argue for uniform policy templates that would be applicable across the whole of the EU. In this respect, in the range of public policy instruments used by the EU, coordination seems like a second-rate solution [Dehoussé 2002].

The OMC is not a treaty-based procedure of cooperation within the EU. Although by the 1990s (and even earlier) EU policy processes contained many

elements of the OMC, the method was only formally introduced by the Lisbon Strategy; hence the perception that the Lisbon Strategy was the starting point of the OMC. However, Radaelli [2003: 17] believes that the OMC only represents a genuine novelty in some fields (such as education), those in which previously no real forms of coordination had been used, whereas for other fields (economic co-operation, social policy) the method represents the simplification and improved coordination of already existing cooperation within the Cardiff, Cologne, and Luxembourg processes (Paragraphs 35 and 36 of the *Presidency Conclusions. Lisbon European Council. 23 and 24 March 2000* [European Council 2000]). In Paragraph 37 of the Lisbon Strategy the OMC is described as addressing the following activities: (a) fixing guidelines for the EU along with specific timetables in which to achieve the short-, medium-, and long-term goals that have been set; (b) establishing, where appropriate, quantitative and qualitative indicators and benchmarks in reference to the best standards in the world and tailored to the needs of different member states and sectors as a means of comparing best practices; (c) translating these European guidelines into national and regional policies by setting specific targets and adopting measures while taking national and regional differences into account; and (d) periodic monitoring, evaluation, and peer review organised as mutual learning processes.

As mentioned above, the OMC represents a foundation for cooperation between EU member states in the field of education. The Lisbon process and the introduction of the OMC formed a basis for situating the education sector in the wider EU context and thus legitimising it as a subject of European integration [Gornitzka 2006]. In this respect, the OMC represents a milestone in European education policy since it has arguably increased and strengthened the education sector at the EU level, whilst opening it up to influences from other fields (economic and social policy) [Gornitzka 2006: 10]. The core of the OMC process in the field of education is the Education and Training 2010 Work Programme [Lange and Alexiadou 2007]. In this context, the OMC process includes: the formation of diversified working groups that bring together national experts and partners; the sharing of practices and experiences connected with tackling the common objectives adopted by ministers; defining indicators for monitoring progress; and producing European benchmarks to support national reforms.

What potential does the Open Method of Coordination hold?

The method's flexibility means it is used in a variety of ways across many policy fields. As a result, among the various policy fields to which it is applied the method is employed differently depending on how ambitious the common goals, modes, and procedures of cooperation are, and depending on the use and institutionalisation of the method's tools and monitoring procedures [Alexiadou 2007: 5; Goetschy 2005; Zeitlin 2005a: 20].

The use of the OMC in the area of education policy is less formalised and determined than in any other field. For example, unlike employment policy and Economic and Monetary Union, in education the use of OMC does not have a basis in a treaty. It is also less determined in that it does not prescribe guidelines or national reform/action plans [Mabbett 2007 in Lange and Alexiadou 2007]. On the other hand, Laffan and Shaw [2005] estimate that the OMC's use in the field of education is a strongly institutionalised process, even though not all of its potential has been equally utilised and institutionalised.⁴ Application of the OMC in the education sector therefore involves not just the question of how far it is possible to Europeanise education policies, but also of how the OMC can help to innovate national methods of governing the education system [Halász 2003: 5]. This view is in accordance with Hodson and Maher's [2001] assessment that the OMC is designed not only to deliver new policy outcomes but also to act as a process for improving policy settings.

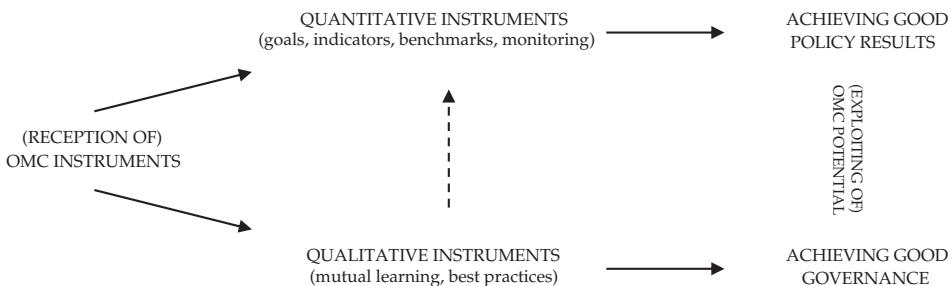
According to the Lisbon Strategy, the OMC's activities include the following instruments: common goals, indicators, benchmarks, mutual learning, best practices, and periodic monitoring [Laffan and Shaw 2005: 15].⁵ Figure 1 shows that the introduction of all these instruments would provide member states with the potential to improve their education policies in two ways: good results (achieving EU indicators and benchmarks) and improved their policy processes in education resulting from respect for the principles of good governance in the EU. According to these two areas of improvement we can divide OMC instruments into quantitative (common goals, indicators, benchmarks, monitoring) and qualitative (mutual learning, best practices) instruments. These quantitative instruments have the potential to improve results in the field of education policy, whereas the qualitative instruments have the potential to promote good governance.

The main aim of the potential described above is to encourage the identification and transfer of new and useful knowledge. This should result in new policy ideas and decisions, institutional diversification, policy implementation, and common priorities. Convergence should be achieved at the level of goals and outcomes. In this respect, the OMC aims at convergence only in the final results, not in the methods and procedures leading up to them; thus, there can be significant differences in the methods adopted by different member states to achieve common EU goals. Using the OMC process, member states should improve their education policies and simultaneously contribute to the convergence and enhanced quality of education across the EU. The main point to bear in mind is that

⁴ Laffan and Shaw [2005] believe that the institutionalisation of the OMC process in a respective policy field depends upon the time period of exploiting potential in the respective policy field. The longer the method is applied in a respective policy field, the more institutionalised is the process.

⁵ According to Laffan and Shaw [2005], these instruments are not hierarchically related; they have different levels of institutionalisation, between which a logical correlation exists.

Figure 1. Research model to investigate the relationship between the reception of OMC instruments (OMC influence) in EU member states and the exploitation of the OMC's potential



Source: Authors' compilation.

OMC is based on the expectation that the convergence of ideas will produce policy change at the domestic level. After this, so the argument goes, policymakers with the same 'Europeanised' ideas will learn and change their domestic policies accordingly. But the question is, how powerful is Europeanisation in the case of governance by coordination? How far can it go? [Bulmer and Radaelli 2004]

The OMC institutional framework offers information and methodological support to European education policy as a decentralised system of governance. The OMC process is structured differently in individual fields, as is apparent from the selective inclusion of the broad selection of elements the method offers [Zeithlin 2005a: 21]. EU member states select by themselves the means they perceive as useful (either upon recommendation or based on their own choices) in the context of their individual capabilities [Kohl and Vahlpahl 2005: 6]. Member states are not passive recipients of EU policies. Rather, they are included in the complex process of selectively adopting policy instruments [Alexiadou 2007: 2]. However, the flexibility and non-obligatory nature of the OMC can lead to its simply not being applied in member states.

Paragraph 38 of the Lisbon Strategy states: 'A fully decentralised approach will be applied in line with the principle of subsidiarity in which the Union, the member states, the regional and local levels, as well as the social partners and civil society, will be actively involved, using variable forms of partnership. A method of benchmarking best practices on managing change will be devised by the European Commission networking with different providers and users, namely the social partners, companies and NGOs.' [European Council 2000] This means that, in its ideal form, the OMC represents a new mode of governance. This is in line with its chief characteristics: participation, and a specific approach to problem-solving whereby knowledge and policy learning are dispersed among member states. The emergence of policy learning as a central mode of governance has

been explained and justified from various perspectives [Gornitzka 2006; Hartlapp 2009; Kan 2005; Radaelli 2000, 2008], while policy learning in official EU documents is also presented as an essential component of EU governance [Radaelli 2008: 241].⁶ Radaelli [2008] defines policy learning as an expression of experimental democracy, and consequently a potential mechanism for stimulating experimental learning and deliberative collective problem-solving since it encourages member states to exchange information, draw comparisons and evaluate existing practices. Similarly, Kan [2005: 2] estimates that policy learning as a prime mode of new governance responds to the need for flexible, deliberative, and participatory problem-solving.

The emergence in the field of education policy of forms of coordination based on the principle of subsidiarity could be said to represent the development of a more democratic culture in the European education space, thus tackling the democratic deficit [Armstrong 2006a]. Many scholars [e.g. Rodrigues 2001] regard the OMC as a possible vehicle for increasing democratic participation and accountability within the EU by opening up the policy-making process to include civil society and sub-national actors. The democratic legitimacy of the OMC depends on the extent to which the process is open to broader participation, while simultaneously it is also important in terms of the method's efficiency [Radaelli 2004: 13].

The European Commission's *White Paper* on European governance [2001] highlights the need to open up the policy process to encompass a broader set of policy actors. In this respect, it encourages the greater openness, accountability, and reliability of the actors involved. This approach allows European citizens to observe how member states, through joint cooperation within the EU, are able to cope effectively with different problems. In the *White Paper* the OMC is mentioned as a form of governance that should satisfy the prescribed needs. Here, according to the European Commission, five principles of 'good governance' are crucial. 'Each of them [principles] is important for establishing more democratic governance. They underpin democracy and the rule of law in the member states, but they apply to all levels of government—global, European, national, regional and local.' [European Commission 2001: 10] These principles are: openness, participation, accountability, effectiveness, and coherence [see European Commission 2001: 10].

⁶ In the European Governance White Paper adopted by the European Commission in 2001, learning is mentioned at some points as a form of new governance. In relation to the OMC it states: 'The process of EU policy-making, in particular its timing, should allow member states to listen to and learn from regional and local experiences.' [European Commission 2001: 12] The OMC is described as: 'a way of encouraging co-operation, the exchange of best practices and agreeing on common targets and guidelines ... allowing member states to compare their efforts and learn from the experience of others' [European Commission 2001: 21]. 'The need for a stronger culture of evaluation and feedback is stressed in order to learn from the successes and mistakes of the past.' [European Commission 2001: 22]

Estimating the OMC through the above-mentioned principles of good governance reveals that, although the Lisbon Strategy envisions that learning be transmitted through the mechanism of participatory governance, national parliaments, regions, and local authorities play just a marginal role in this process [Borrás and Jacobsson 2004: 199; Zeitlin 2005b]. This is a serious weakness in a method that relies heavily on the possibility of benefiting from local knowledge. Borrás and Jacobson [2004: 199] state that the OMC's openness to different actors is not being fully exploited, especially within member states. Instead of stressing broader participation, some scholars [e.g. Zeitlin 2005b] believe that the OMC's essential advantage is to form national and European coordination bodies and a transnational, highly professionalised arena for the coordination of national modernisation processes. A considerable share of cooperation takes place in bureaucratic, highly professionalised, and politically unsupervised decision-making committees, and even in bilateral relations between the Commission and the Council [Zeitlin 2005b].

At the moment, despite initial hopes, the OMC is not a particularly open process. The OMC is based on a network of public civil servants and experts, which could increase the technocratic nature of the EU policy process rather than opening the way to more democratic decisions processes. Situations in which the OMC process includes trade unions, chambers of commerce, and social actors tend to be the result of national practices rather than the result of changes brought about by the use of this method. The OMC's potential to bring about change and expand possible cooperation is thus not being fully exploited [Radaelli 2004: 14].

With regard to the bottom-up approach,⁷ it is important for every member state to respect all the principles of OMC, since only then can good governance be an attribute of the EU as a whole. In the next section we will review Slovenia's introduction of the OMC's instruments and evaluate how their potential to achieve quantitative (positive results) and qualitative (respecting principles of good governance) goals is being put to best use.

Exploiting the potential of the OMC in Slovenian education policy: empirical evidence

In this section, we will first explain the key features of Slovenian education policy in a European context, and then we will analyse how the OMC could be best put to work on the basis of the four activities defined in Paragraph 37 of the Lisbon Strategy [European Council 2000].

⁷ The 'bottom-up' approach in the EU means that the national political systems and cultures of the member states are regarded as the main source of input into the process of establishing supranational norms [Olaf, Zoethout and Peters 2007].

Slovenian education policy in a European context

The education system in present-day Slovenia has a long history. It was formed over the course of different administrative systems,⁸ and a turning point in its development occurred in the 1990s—following Slovenia's independence in 1991. In its efforts to set up a high quality education system which would enable the maximum number of its residents not only to exercise their rights to education, but also to achieve their desired occupation, Slovenia introduced new legislation regulating the entire education system from pre-school through to university education (1993–1996). Since then, the legislation regulating matters of management, organisation, and financing has undergone many changes. These relate to specific issues, and have been, at least to some (limited) extent, subject to conformity with the requirements of Slovenia's membership in the EU [Eurydice 2009; Gabrič 2009; Ministry of Education and Sport 2007b].

In 2004, when Slovenia became a full member of the EU, the Slovenian education system was already fairly well developed, with some targets and indicators already matching or exceeding EU averages. However, Slovenia's efforts to improve the quality, accessibility, and openness of its education and training systems remain an ongoing project. A fundamental problem stems from the frequent reforms that have been made to the education system. Slovenia's independence triggered social and political changes and the education reforms introduced shortly afterwards have not yet been brought to a successful closure as modernisation of the system had to be addressed yet again when Slovenia joined the EU. Adaptation to the European Education Area has been a demanding task, since some of Slovenia's national standards were previously different⁹ from those in the EU [Ministry of Education and Sport 2005: 3].

Among issues related to policy content, the question of changes to the policy process is also relevant. The OMC represents a supplementary activity to the

⁸ The development of Slovenian education policy has been shaped by three key periods. The first period includes the developments that took place within the different administrative systems prior to the Second World War. This period was marked by different interventions and enforced rules. The second period was the development of education within socialist Yugoslavia, from the end of the Second World War until Slovenia's independence in 1991. During this period, Slovenia, as one of the socialist republics of Yugoslavia, (partially) developed its own education policy, whilst at the same time keeping its policy consistent with the common federal arrangement. The third period is the development of education policy in an independent Slovenia from 1991 onwards. In all three periods, we can observe different developments that took place across the entire education system, extending from pre-school up to university education.

⁹ Slovenia had to devise a national lifelong learning strategy, develop a national qualifications framework, develop systems for the recognition of non-formal and informal learning, enable progression from post-secondary vocational education to higher education, improve financial incentives for employers and employees, provide for public accountability in higher education and heed the social dimension while pursuing the current

principal process and does not extend to bringing about any change in the process. Because the OMC employs a soft method of activity and cooperation at the EU level, the national parliament is excluded from the process. Underdeveloped partnership relations constitute a major obstacle to the progress of lifelong learning in Slovenia [Ministry of Education and Sport and the Slovenian Institute for Adult Education 2001: 3]. Thus, in the future Slovenia needs to develop the means to stimulate and strengthen the inclusion of social partners, civil society, and local communities, since their role in planning and implementing the Strategy for Lifelong Learning is still too passive. The Strategy for Lifelong Learning in Slovenia was mainly developed by the Ministry of Education and Sport. Therefore, the main emphasis is on creating solutions and measures directly connected to the field of the Education and Training 2010 Work Programme. Policymakers from the education field report that other fields, for instance the economy, have been responding relatively well to their various proposals, but that it is still hard to foster the mentality that the issue of lifelong learning demands an integral inter-sectoral approach [Ministry of Education and Sport 2007a]. As Mandin and Palier note [in Dehoussé 2002: 13], the Coordination of Education and Training has not taken full advantage of European procedures so as to increase its influence by drawing the attention of political leaders to educational priorities and projects. Inter-ministerial cooperation is also welcomed from the perspective of the congruity of policies. Education policy in Slovenia is to some extent still developing too independently, with insufficient support from other sectors and an insignificant connection with other sectors.

Fixing guidelines, timetables, and common goals

Establishing common goals and measuring progress according to specific guidelines demonstrates the political will to identify the common problems of European education. Such identification can unleash the envisioned capacity of cooperation to foster greater convergence of ideas [Dehoussé 2002; Gornitzka 2006]. An analysis of Slovenian strategy documents (*Slovenia's Development Strategy* [Institute of Macroeconomic Analysis and Development 2005a]; *Resolution on the Master Plan for Adult Education in the Republic of Slovenia until 2010* [National Assembly of the Republic of Slovenia 2004]) reveals a correlation between national benchmarks defined in these documents and the European benchmarks defined in the Education and Training 2010 Work Programme. Therefore, strategies as-

higher education reform, forge partnerships in vocational education and training (VET) at regional and local levels, improve the image of VET, and thus attract more students into the system. Substantial attention was also devoted to the mobility of pupils, students, teachers, and trainers as the process has a profound impact on the introduction of the European dimension into the national framework [Ministry of Education and Sport 2005].

sociated with lifelong learning that have been adopted in Slovenia and at the EU level follow common goals. At the same time, timetables for achieving national goals in the field of education in Slovenia are harmonised with the European timetables.

In 2004 the Slovenian Parliament adopted the 'Resolution on Adult Education Master Plan until 2010'. The resolution declares that in the context of the EU Slovenia faces new challenges in adult education and should therefore take responsibility for achieving Lisbon goals. The following goals are defined in accordance with the EU benchmark (i.e. the percentage of the adult population participating in lifelong learning) in the Resolution: to increase participation in adult learning by six percent; to raise the educational attainment of the adult population; and to increase the employability of both employed and unemployed. Adjusting the education system to meet EU goals is also recognised in the report issued by the Ministry of Education and Sport and the Slovenian Institute for Adult Education [2008: 13].

Qualitative and quantitative indicators and benchmarks

Though a soft form of cooperation, the OMC nonetheless relies on mechanisms that are generally viewed as strong—namely indicators and benchmarks. When indicators are being established, it is first necessary to determine the starting points for dialogue between member states that reflect their different achievements. Indicators and benchmarks should lead to a greater degree of transparency and a more comparable environment. The role of indicators (and benchmarks) in European education and training policy is thus twofold: to measure progress and to highlight cases of good practice [Lange and Alexiadou 2007]. As quantitative instruments, indicators should not only be used to provide direction in those fields where more progress is needed, but also as a tool for sanctioning and for increasing the consensus on common EU policies.

The annual progress report on member states (*Progress Towards the Lisbon Objectives in Education and Training—Indicators and Benchmarks* [European Commission 2004, 2005, 2006, 2007, 2008, 2009]) reveals that Slovenia does not enable access to data for all indicators, and that some indicators in Slovenia are not being taken into consideration (for example, the number of early school-leavers in Slovenia is not measured). This represents a serious obstacle to the proper exploitation of OMC indicators (for instance, comparisons with other member states). In addition, the non-performance of an indicator system in Slovenia was identified in the 2007 *Slovenian Report on the Implementation of the Education and Training 2010 Work Programme* [2007a]: 'It is necessary to realise projects of monitoring and evaluation of education effects in accordance with the agreed indicators and to reasonably and suitably respond to results—findings of research projects; to develop indicators at the national level and—if they prove to be effective—at the

EU level influence the formation of indicators for monitoring and measuring the development of individual key competencies.¹⁰ We can identify two reasons for the non-inclusion of certain indicators: (a) indicators can be politicised so that some states do not want to be measured in fields in which they perform poorly [Munkholm and Kjølsen Olsen 2009]; and (b) a shortage of (financial) resources and infrastructure for measuring them [Livingston 2003].¹⁰

Translating European guidelines into national policies

The OMC is particularly interesting for the way in which it directs both national and sub-national policy-making in EU matters [Ferrera and Sacchi in Alexiadou 2007: 4]. Although the method is non-obligatory, the logic of this process and its potential and goals mean that it is important that it be taken into consideration [Šenberga 2005: 6]. Because its use is not obligatory, adaptation pressures and demands for the harmonisation of legislation cannot be applied directly. The OMC does not require new legislation or the transposition of EU legislation to suit European directives; further, this is not a precondition for change, reform or implementation within a respective member state [López-Santana 2006]. Therefore, the EU's influence in the education field is intended to be visible not just in structural and policy changes but also in the internalisation of European values and policy paradigms at the national level and in the way political debates and identities are changing. It is argued that the OMC has an impact especially on the cognitive level of public policies, for example, on the discourse of political actors and policy concepts. It stimulates national debates and provides various interests with arguments in support of policy change, and consequently offers arguments that legitimise national reforms [Radaelli 2003]. It can infuse national debates with new knowledge and new policy concepts, forge connections between policy fields, and thus lead to changes in the way in which problems and solutions are understood.

The OMC's influence on EU member states is twofold: it can change the behaviour of member states' officials, and it affects their readiness to gain information for comparisons, learning, and adaptation [Chalmers and Lodge 2003: 11]. Due to the desire of member states to achieve positive results, governments are compelled by the OMC to become attentive to new approaches and instruments. The desire to achieve positive results presupposes the development of capacities and means that can be used to those goals [Dehousse 2002: 13].

The dynamics of cooperation in European education suggest that mutual learning and transformation via a cognitive process leads to convergence at a declarative level, and is expressed in a common language of cooperation, a joint

¹⁰ Financial resources are not the reason why measurements are not made. Slovenian representatives claim that funding from the European Social Fund, dedicated to successful implementation of the Education and Training 2010 Work Programme, have been appropriately redistributed to priority fields [Ministry of Education and Sport 2007a].

understanding of basic mechanisms and instruments, and cooperation and recommendations on key competencies. Although it is hard to assess how deep the cognitive convergence of opinions and persuasion between member states is, some scholars [e.g. Larionova 2007] argue that the Education and Training 2010 Work Programme clearly expresses a cognitive convergence of common goals and fundamental principles in the various education systems of Europe. On the other hand, a greater degree of convergence at the decision-making level and execution level is more complex and barely being accomplished.

From the point of view of the OMC, cognitive Europeanisation can be identified in Slovenian official documents. This means that the nature of Slovenian discourse on education is coming to resemble European discourse. For example, the Strategy for Lifelong Learning, which was prepared on the basis of more than 15 European and over 17 national analyses, reports, strategies, and action plans, and represents the main education document that responds to the Education and Training 2010 Work Programme, stressed that, in accordance with the paradigm shift from education to learning in the EU, the name of the Slovenian Ministry should also be changed. The adoption of European discourse in Slovenia can also be seen from the activities and results of the project 'The Influence of the Concept and Strategy for Lifelong Learning on Professional Terminology in Education and Training'. In the framework of this project two consultations were organised and a guide to Slovenian terminology in the field of lifelong learning was published, which discusses some of the difficulties of adopting the new vocabulary [Educational Research Institute 2008].

However, the majority of education-related legislation in Slovenia was passed during the first years of the country's independence and thereby established the new democratic grounds for managing this field. Legislation was adopted before Slovenia joined the EU and, consequently, despite some later amendments, it is impossible to trace in it the OMC's influences. After the introduction of the Lisbon Strategy in 2000 it is possible to find some formal and informal documents¹¹ on the concept of lifelong learning that represent Slovenia's response to the European Commission's initiatives. In terms of timelines, indicators, and benchmarks, they closely reflect the Education and Training 2010 Work Programme.

Although the transposition of OMC documents (as a kind of 'European legislation') in member states is not a precondition for the OMC's operation, we believe that the inclusion of individual OMC elements in preparing new legislation

¹¹ *The National Report from Slovenia on the Consultation Process of the Memorandum on Lifelong Learning* [Ministry of Education and Sport and Slovenian Institute for Adult Education 2001]; *Slovenia's Development Strategy* [Institute of Macroeconomic Analysis and Development 2005a]; *Reform Programme for Achieving the Lisbon Strategy Goals* [Institute of Macroeconomic Analysis and Development 2005b]; *Resolution on the Master Plan for Adult Education in the Republic of Slovenia until 2010* [National Assembly of the Republic of Slovenia 2004]; *National Programme of Education for Democratic Citizenship and Education for Human Rights* [Ministry of Education and Sport 2004]; *Guidelines for Education for Sustainable Development from Pre-school to Pre-university Education* [Ministry of Education and Sport 2007c].

and future development documents could represent potential for enhancing the OMC's visibility and elevating recognition of and responsibility for its application in Slovenia.

In the case of Slovenia we can confirm that a majority of initiatives at the EU level influence the deliberations of governmental actors by directing Slovenian education policy towards achieving comparable results across Europe. On the other hand, legislative changes have yet to be made and there have been no perceptible changes in the policy process (in the sense of more democratic governance). In terms of education as a policy field, the introduction of the concept of lifelong learning is responsible for the greatest shift in relations between the individual subfields of education (i.e. the increased importance of some subfields such as early childhood education, adult education), which may be regarded as a result of inclusion in European cooperation.

Periodic monitoring, evaluation and peer review organised as a mutual learning process

The OMC represents an opportunity to establish an institutionalised learning capability [Gornitzka 2006: 39]. This means that states, irrespective of their different traditions, systemic differences, and lack of a normative interpretation of European integration, can learn from each other and improve their policies for achieving common goals. Since all the actors are aspiring towards the same goals, mutual learning is regarded as a rational form of collective problem-solving. The OMC thus acts as a radar, searching for solutions and new applicable knowledge; the EU acts as a template for policy learning and policy transfer [Radaelli 2003], which distinguishes it from other supranational decision-making structures.

Clusters and Peer Learning Activities are the most important form of policy learning within the framework of the OMC and Education and Training 2010 Work Programme.¹² Our analysis reveals that Slovenian representatives are not actively included in all clusters. Slovenia's lack of direct inclusion in clusters and cooperation at the EU level is justified as follows: 'We are not actively participat-

¹² Clusters are a form of cooperation in which national delegates/experts, representatives of the European Commission, and other relevant institutions exchange information on different policy options, which can help advance reforms in national education and training systems and, together with other mutual learning activities, form a key part of the Education and Training 2010 Work Programme. Their main working method is the identification and planning of Peer Learning Activities (PLAs). The PLAs are a process of cooperation at the European level whereby policy makers and practitioners from one country learn from the experiences of their counterparts elsewhere in Europe in implementing reforms in areas of shared interest and concern. Within the framework of Education and Training 2010 Work Programme the following clusters were active: Information and Communication Technology (ICT); Access and Social Inclusion; Key Competences; Making Best Use of Resources; Math, Science and Technology (MST); the Modernisation of Higher Education; the Recognition of Learning Outcomes; Teachers and Trainers; and the Working Group on the Adult Learning Action Plan [European Commission 2010].

ing in the key competences cluster, but we do take into consideration the available results of the cluster's work in policy formulation and make use of them in the implementation of measures.' [Ministry of Education and Sport 2009] Lange and Alexiadou [2007] measure the level of influence of a member state on European education policy by its number of leading activities concerning lifelong learning. Therefore, despite monitoring the results, non-attendance in clusters may signify only the passive adoption of EU policies.

Whether new knowledge is appropriately distributed among different stakeholders is also a particularly important question. Munkholm and Kjølsen Olsen [2009: 42] believe that the question of whether an idea will actually become installed in the national context depends on the political influence of the national expert. In the field of education in Slovenia, a considered recommendation [Dehousse 2002: 13] is that governments in specialised networks at the EU level nominate their highest professional authorities. Their influence in the European network generally depends on their ability to demonstrate advanced knowledge in the sphere of their activity and competence. Another interesting question is whether Slovenian representatives in their respective clusters are active enough—there is no supervision when an individual cluster is represented by just one representative from Slovenia. Finally, there exists the risk that (technocratically) adopted decisions in specialised committees could later be remodelled in different ways under the (political) influence of the Council.¹³

Regarding the EU member states that achieve particularly positive results across the various indicators, other member states express a great interest in the export of knowledge and best practices.¹⁴ Although Slovenia achieves EU-comparable and even above-average results in many fields, it remains passive when it comes to exporting its knowledge. In the future, Slovenia should organise more activities directed at mutual learning; this could help Slovenia strengthen its position and identity in the EU policy arena and, in accordance with theoretical

¹³ The OMC tends to work in stages. First, the Council of the EU agrees on policy goals. Member states then translate guidelines into national and regional policies. Third, specific benchmarks and indicators to measure best practice are agreed upon. Finally, results are monitored and evaluated. The Council and the Commission publish a joint report on the overall situation in the field of education and training every two years. The Commission first prepares the Recommendation of the Report which may not always be entirely accepted by the Council. Sometimes information from politically sensitive areas are transformed or removed.

¹⁴ A statement is based on an analysis of member states' performances (as seen in the European Commission's progress reports: *Progress Reports Towards the Lisbon Objectives in Education and Training—Indicators and Benchmarks* [European Commission 2004, 2005, 2006, 2007, 2008, 2009] and its connection with member states' participation in clusters and peer learning activities [European Commission 2010]. The analysis reveals that some countries that achieve particularly good results in various indicators (for example Austria, the Netherlands, Norway, the United Kingdom) are also particularly active in organising Peer Learning Activities.

assumptions [see Lange and Alexiadou 2007], it could reorient its role of mutual policy learning towards 'imperialistic' (forced) policy learning or 'exporting knowledge'. The OMC in theory represents an opportunity for small countries to exert an influence in areas in which the OMC is in operation (in other forms of cooperation, for example, such influence is hard(er) to achieve). The notion of an influential small country with excellent results also corresponds to the foundation of 'evidence-based policy making'. By identifying best practices, the assessment of 'what works' is based on good results rather than on political influence, intuition, or a belief in certain influential actors [Sanderson 2002].

For national actors, periodical monitoring and regular reporting are a special task with set deadlines. These reports feed information back into the European educational process and ensure that national administrators support the Education and Training 2010 Work Programme. Here, a special role is played by the national group that prepares the report. In Slovenia, a national group composed mostly of government representatives prepares the report. Although this group generally does not include representatives of non-governmental organisations or social partners, Slovenian representatives claim that objectivity is ensured through the public release of these reports. Munkholm and Kjølsen Olsen [2009: 42], however, warn that a country's poor results can only become a motivation for change if the results (Progress Reports) are deliberated publicly and at the same time receive sufficient support from the media. The problem is that many countries do not discuss the results and the comparisons arising from the Progress Reports since the reports never reach all the relevant stakeholders at the national level. Furthermore, not all actors are included in the process of collecting and preparing the data. This is another factor that can result in incomplete evaluation [Munkholm and Kjølsen Olsen 2009: 41].

Conclusion

Based on the above analysis we may conclude that the OMC's potential in the field of education policy in Slovenia is not being fully exploited. The main question is why. Casey and Gold [2005], for example, mention the following possible reasons: institutional burdens (different legal framework, political structure, formal rules and procedures, symbols and moral frames, and the lack of supporting infrastructure to ensure that the policy is accepted at the national level); attitudinal restrictions (problems overcoming cultural differences); administrative bottlenecks and finances (which could represent a serious obstacle to implementation); and interruption of the learning process [see also Gornitzka 2006]. In the case of Slovenia the analysis shows that the main problems are the lack of knowledge/information about the method (its potential, activities, and instruments) and the lack of any widespread use of the method at the national and supranational levels. One of the reasons for this is that only five people in the entire Ministry of Education and Sport are working with the OMC (and have substantial knowl-

edge of the OMC). We also recognise that sometimes Slovenian representatives involved in the OMC process and activities at the national and EU levels do not recognise that they are actually involved in the OMC. As discussed, Slovenia's non-participation in clusters and its deficient sharing of experiences seems to be problematic. In this respect, the OMC is not as open as it could be and it does not include as broad a range of actors as it should. Cooperation among the different actors could stimulate not only a greater degree of 'learning about policy' from other states, but also 'learning about the OMC' between actors and sectors within Slovenia. This supports the belief that the OMC becomes more influential in policy-making processes when the policy actors are conscious of its goals and means [Büchs 2003: 33].

The Slovenian experience in the field of education policy demonstrates the limited effects of Europeanisation in the case of governance by coordination [see Bulmer and Radaelli 2004]. Most EU education initiatives do exert an influence on the deliberations of Slovenia's government actors by encouraging the country's education policy to achieve results that are comparable to European results. Nevertheless, this has not resulted in any major amendments to Slovenia's legislation, and it cannot be said that Slovenia's policy process has become more democratic either.

Given the methodological obstacles to measuring the influence of the OMC [Alexiadou 2007; Büchs 2003; Citi and Rhodes 2007; Goetschy 2005; Heidenreich and Bischoff 2006], it is hard to determine whether greater exploitation of its potential would lead to either better quantitative results or more democratic governance. This is similar to Radaelli's [2008] dilemma when measuring the impact of the OMC—should it be according to quantitative goals (better results) or qualitative goals (more democratic governance)? In spite of these obstacles and dilemmas our analysis reveals that member states like Slovenia can achieve positive quantitative results without fully exploiting the OMC's full potential, especially the qualitative potential of good governance. Slovenia certainly achieves results comparable to other member states, and in some areas of education its results are even above average. However, due to the methodological limitations of measuring the OMC's impact, we cannot attribute these results solely to the OMC. On the other hand, to achieve the goals of good governance, the OMC's potential in Slovenia should be put to better use. Representatives of the Slovenian Ministry of Education and Sport believe that more obligatory cooperation in the field of European education would be unacceptable for Slovenia.¹⁵ Therefore, in the Slovenian context, it is necessary to promote the positive elements of the OMC and its potential. Even though the question of the OMC's impact on Slovenia's education policy remains to some extent open, one thing is clear—greater knowledge about the OMC can only lead to the better exploitation of its potential.

¹⁵ Information gathered by interviewing officials in the Slovenian Ministry of Education and Sport in 2008.

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