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„Bildungskonto Oberösterreich“: Access to education/training for precarious/disadvantaged workers?

A case study

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Research report



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„Bildungskonto Oberösterreich“: Access to education/training for precarious/disadvantaged workers? A case study.

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Abstract

The Bildungskonto is a long-lasting measure of support of adult education, started as a part of support for employees initiated by the regional chamber of labor in the context of the EU accession in 1994. The measure supports the costs of vocationally oriented further education for medium level skilled employees. It has a compensatory mission, and is targeted to certain groups. In recent years non-standard employees were gradually included as target groups. The measure has steadily expanded until the 2000s, and is stagnating since a reform in 2010.

The efficacy cannot be reasonable analyzed on basis of the available material. In particular the labor force survey that measures participation in adult education has been reformed at a critical point, thus the causes for changes in participation cannot be clearly attributed. The assessments by stakeholders are ambivalent. The measure is clearly not feasible for disadvantaged groups because they have to pay their fees in advance.

Schlagwörter: Bildungskonto, adult education, support, Austria, Individual Learning Account

Zusammenfassung

Das Bildungskonto ist eine der langlaufenden Maßnahmen der Förderung von Erwachsenenbildung (seit 1994), die im Zusammenhang mit dem EU-Beitritt als regionale ArbeitnehmerInnenförderung von der AK angestoßen wurde. Gefördert werden die Kosten von Weiterbildung für mittel qualifizierte Fachkräfte mit kompensatorischem Anspruch. Die Förderung erfolgt differenziert nach Zielgruppen, in den letzten Jahren wurden auch Positionen von Non-Standard Employees einbezogen. Die Maßnahme hat bis in die 2000er Jahre expandiert, und stagniert seit einer Reform der Bedingungen in 2010.

Zur Wirksamkeit sind mit den vorhandenen Materialien schwer Aussagen zu machen, u.a. da zu einem entscheidenden Zeitpunkt die Arbeitskräfteerhebung reformiert wurde, so dass die Veränderungen nicht klar zugerechnet werden können. Die Einschätzungen der Stakeholder sind ambivalent. Für benachteiligte Gruppen ist die Maßnahme nicht gut geeignet, da die TeilnehmerInnen die Vorfinanzierung übernehmen müssen.

Schlagwörter: Bildungskonto, Erwachsenenbildung, Förderung, Österreich, Individual Learning Account.

List of acronyms

AEI Adult Education Initiative

AK Arbeiterkammer, Chamber of Labor

AMS Arbeitsmarktservice, Austrian public employment service

bfi Berufsförderungsinstitut, employees' adult education provider

BMAGSK Bundesministerium für Arbeit, Gesundheit, Soziales und Konsumentenschutz, labor ministry

BMASK Bundesministerium für Arbeit, Soziales und Konsumentenschutz, former name of labor ministry

ECDL European Computer Driving Licence

FPOE Freiheitliche Partei Österreichs, right wing freedom party

FSG Fraktion Sozialistischer Gewerkschafter, social democratic faction in the trade union

KEBÖ Konferenz der Erwachsenenbildung Österreich, platform of selected adult education providers eligible for federal support

OE Cert federal seal of quality of adult education providers

OEAAB Österreichischer Arbeiter- und Angestelltenbund, employees organisation of the christian democrat party OEVP

OEVP Österreichische Volkspartei, christian democrat party

OOE Qualitätsiegel, regional quality seal of adult education in Upper Austria

SPOE Sozialdemokratische Partei Österreichs, social democratic party

VHS Volkshochschule, provider for adult education

WIFI Wirtschaftsförderungsinstitut, employers' adult education provider

WK Wirtschaftskammer, Economic chamber

1 Introduction

1.1 Background

We selected the *Bildungskonto* as a visible, longstanding and stable example of an ‘Individual Learning Account’, that was designed to support the access of certain target groups to education and training. The name of the measure is somewhat misleading, because it is rather a kind of fund for the support of training of certain target groups than a real individual learning account. The main target of the measure was to increase training participation of medium level skilled workers (which are in Austria mainly those that hold a certificate from apprenticeship training).

The measure was established in 1994,¹ in the context of the Austrian EU accession, to improve the qualification level and the occupational mobility of skilled workers with credentials from the Austrian dual apprenticeship system and similar school-based qualifications. A main initiative was taken by the chamber of labor, in cooperation with the regional government. Two rationales can be found behind the measure, first the idea that the completers of the apprenticeship system had received substantially less public support for their initial education and training than completers of the upper level schools and of higher education, thus a virtual ‘account’ of public educational investment could be increased, if this group would receive a certain additional compensatory amount of public financial support for further vocational education and training. The second rationale was that the Public Employment Service (AMS) has spent substantial resources for education and training measures of unemployed persons, therefore complementary measures for the public support of employed persons should be available also; this rationale was supported by estimations that showed comparatively low investment in adult education in Austria (Ofner, Wimmer 1998).

The *Bildungskonto* was explicitly and deliberately initiated as a support for employees (Arbeitnehmerförderung) in a period, when the Austrian corporatist model still worked well in Upper Austria. The two traditional parties OeVP and SPÖ formed a regional coalition government, and the social partners (Chamber of Labor: AK and Economic Chamber WK) and the Public Employment Service (AMS) cooperated intensely on social and economic policy issues. The measure was developed, governed, and delivered under continuous communication and cooperation among these actors, in particular between the Chamber of Labor and the regional administration. The chamber was involved in the

¹ The foundation and the early development are well documented by Bauer, Hofer 1999.

delivery first directly through its counselling service (Bildungsberatung)¹ and second indirectly through its close relationship to two of the main regional adult education and training providers (bfi: Berufsförderungsinstitut and VHS: Volkshochschule).² Close contacts to the administration allowed for the detection of open issues in the delivery and the conditions for support that could be solved cooperatively and successively by the periodical adaptation of the regulations. This cooperative and collegial mode of governance changed, when the electoral majorities changed and new coalitions were formed in the regional government since 2003. In particular since 2015, under the new government coalition that includes the right wing FPÖ the governance of the *Bildungskonto* takes place without the opportunity of an active involvement of the AK. The measure has also been opened to small entrepreneurs, and the demarcation of employees’ support and employers’ support has been removed.

In the meantime, other Austrian regions have developed and provided similar measures of substantial size and differentiation also; however, the Upper Austrian initiative was special in two respects: first the size of the measure was larger than in other regions, secondly the measure was more specifically targeted than in other regions. Since the beginning of the measure, the other regions have also gradually further developed their programs. In most regions payment is provided after the measure, in some schemes the support can be paid in some parts, and in some schemes the participants have only to

¹ Educational counseling (Bildungsberatung) is one of the services the AK provides to its members and also to non-members on a regular basis: see information on <https://ooe.arbeiterkammer.at/ueberuns/kontakte/beratung/Bildungsberatung.html>; a portfolio of telephone, email, online and personal counseling is provided, a check of personal strengths can be taken in this service (https://ooe.arbeiterkammer.at/beratung/bildung/bildungsundberufswahl/AK_Karriere_plus.html), including workshops, and personal counseling about career potentials. Educational counseling is supported by the central government in the course of the ESF-program by a nation-wide initiative “Bildungsberatung Österreich” that was founded in 2011 (<https://erwachsenenbildung.at/bildungsinfo/orientierung/bildungsberatung.php>; summary in German: <https://erwachsenenbildung.at/images/themen/dossier/ebooks/dossier-bildungsberatung.pdf>) and mainly includes lobbying, quality development, support of professional counselors, etc. EURO 18 million were foreseen as support 2015 through 2017 with envisaged 280.000 counseling contacts nation-wide in this period; in 2016 almost 100.000 contacts were reached (70% in personal counseling, less than 1% in workshops) and about EURO 2 million were spent from the support budget. Regional information is not available; the share of Upper Austria would be EURO 3 million and 47.000 contacts through the whole period, and EURO 330.000 for 17.000 contacts in 2016. The specified disadvantaged target groups for counseling do not include non-standard workers as is the case in support of adult education (target groups for support of counseling: young age with transition problems, older age, migration background, low qualification, out-of-labor-force). A regional network “Bildungsberatung Oberösterreich” (<http://www.bildungsberatung-ooe.at/>) exists, that is coordinated by the AK and includes also among other smaller organizations the bfi and the VHS (<http://www.bildungsberatung-ooe.at/netzwerkpartnerinnen>). If we confront the projected figure of 17.000 counseling contacts with the 15.000 applications in 2017, we see in principle room for counseling of the applicants in terms of order of magnitude. However, a main strategic focus within the lifelong learning strategy for counseling has been laid on a lack of basic competences (e.g. illiteracy) and young persons with transition problems.

² bfi Oberösterreich: <https://www.bfi-ooe.at/de.html>; VHS Oberösterreich: <https://www.vhsooe.at/>

pay 10% as a kind of retention fee, whereas the other 90% are paid directly from the scheme (see section 6 about other possible schemes). In comparison to other regions Upper Austria is near the Austrian average with its regional GDP per capita (see ANNEX 7.6), and the region is known for its strong focus on manufacturing, and also some more marked rural areas in the north neighboring to the Czech Republic.

With some modifications the Upper Austrian measure has been sustained since the early 1990s, evaluations have been made in the earlier periods until the mid-2000s, some in research some by the federal and regional courts of audit. More recently the measure has turned rather into routine, and has also undergone some cuts because of a new regional Centre-right government’s financial austerity policies. The purpose of the case study is to describe the development of the measure, and to figure out, how the precarious and disadvantaged groups under consideration can be supported by this kind of measure.

Adult education policy in Austria is governed by several actors, main responsibilities are situated at the level of regional governments, the public employment service (AMS) is a main financier of labor market training,¹ and the central government through the ministry of education also takes part by supporting a formally established network of adult education providers² and governing the European Social Fund’s (ESF) program part in adult education (see below).³ This fragmented governance structure leads to different configurations of policies in the regions, with different priorities and different measures, and a lack of documentation and overview. The regional measures combine in different ways with national policies, which are also to some part delivered regionally (e.g., the AMS is organized regionally). In any case an assessment of the Bildungskonto must consider the regional dimension, and the resulting overall configuration of measures.

Main national programs are the educational leave programs (Bildungskarenz 1998 and Bildungsteilzeit 2013)⁴, and the qualified workers grant (Fachkräftestipendium 2013)⁵

¹ Arbeitsmarktservice AMS: <http://www.ams.at/>; see basic information about financing of adult education in Austria Lassnigg, Vogtenhuber 2016.

² Konferenz der Erwachsenenbildung Österreichs (KEBÖ), https://erwachsenenbildung.at/themen/eb_in_oesterreich/organisation/keboe.php

³ <https://www.esf.at/>; ESF operational program 2014-2020 <https://www.esf.at/wp-content/uploads/2017/05/ESF-OP-2014-2020.pdf>

⁴ Bildungskarenz, basic info https://www.sozialministerium.at/site/Arbeit_Behinderung/Arbeitsrecht/Karenz_Teilzeit/Bildungskarenz_und_Bildungsteilzeit/; : <https://www.help.gv.at/Portal.Node/hlpd/public/content/357/Seite.3570000.html>; Lassnigg et al. 2011.

⁵ Fachkräftestipendium, basic info AMS: https://www.help.gv.at/linkaufloesung/applikation-flow?flow=LO&quelle=HELP&leistung=LA-HP-GL-Fachkraeftestipendium_Infoblatt; AMS supported programs: http://www.ams.at/_docs/001_fks_liste.pdf; <https://www.help.gv.at/Portal.Node/hlpd/public/content/258/Seite.2580000.html>

both providing support of living expenses under certain conditions, and can be combined with the Bildungskonto. The educational leave programs are targeted to employees with at least six months stay with their current employer and entitlement for unemployment compensation, and an agreement with the employer is required, so non-standard employees are not explicitly excluded,¹ but in practice their participation is rather implausible; the qualified workers grant is open in principle for non-standard employees (see Bock-Schappelwein et al. 2017). Further programs are the second chance program (Initiative Erwachsenenbildung 2011) providing free literacy courses (in Austria called Basisbildung),² and an employer and state financed fund (Sozial-und-Weiterbildungsfonds 2013) that should secure access to training for employees of labor leasing firms/interim agencies (the Austrian expression is Arbeitskräfteüberlassungs-Unternehmen) – these leasing firms and their employees are basically treated as regular employers and employees, and have to pay taxes and social security contributions, the leasing firms have additionally to contribute to the training fund.³ Active labor market policies also provide a lot of training measures through AMS (see comprehensive overviews in BMASK 2013, BMASGK 2018a,b).

1.2 Methodology

The methodology used for this small-scale case study consists of two main parts:

- first a review of existing literature and data (evaluations, government reports, published administrative data, etc.), the results of evaluation studies that were already conducted are also summarized;
- second qualitative interviews with key actors who are (or were) involved in the ILA scheme (representatives of the regional government and from the social partners involved in the administration and governance of the measure, representatives of the main regional adult education providers, and evaluators

¹ Based on a constitutional court decision the former restriction for people with free service contracts was annulled by 2011

https://wien.arbeiterkammer.at/beratung/steuerundeinkommen/freidienstnehmer/sozialversicherungsrecht/Bildungskarenz_fuer_Freie_.html

² Short description in English: https://www.initiative-erwachsenenbildung.at/fileadmin/docs/Austrian_Initiative_for_Adult_Education_2016.pdf; see also more information <https://www.initiative-erwachsenenbildung.at/initiative-erwachsenenbildung/was-ist-das>

³ See basic information <http://personaldienstleister.or.at/zeitarbeitskraefte/sozial-und-weiterbildungsfonds/>: the fund is legally based, (Amendment to Arbeitskräfteüberlassungsgesetz, § 22a AÜG), 2013 founded. The contribution rates of leasing firms to the fund were 2014 0,35% of gross wages of blue-collar workers, in 2015 0,6%, 2016 auf 0,8%, from 2017 in addition for white collar workers 0,8%. Unions and employers manage and the labor ministry oversees the fund. Before this legal regulation the support of further education in this sector was regulated by collective agreements. More information about implementation etc. <https://www.swf-akue.at/>: Ca. 120.000 leasing employees can be supported, the volume of the funds is € 13,3 Mio., 22.000 employees were supported 2014–2016.

and quality control representatives; see the list of interview partners in the Annex).

Further details, which embed the policy in further backgrounds, are documented quite extensively in the ANNEX.

Most of the material about the Bildungskonto is still not publicly available, and the past information in the net has also been regularly overwritten with the recent information, so it is not so easy to get access to the information bases. The administrative unit of the regional government provided us with the available material.

The administrative data base was gradually developed; a consistent and detailed yearly body of data is available for the period 2009-17, for the period 2000-09 the basic data were reconstructed for us by the government unit, and the information 1994-1999 we had to reconstruct from otherwise published material as far as possible.

The interview partners were very cooperative, provided us to some part with additional material; however, they were mainly interested in the current situation. Only some of them were involved for a longer time, or from the beginning, so that the reconstruction of the earlier periods had to be made mainly on basis of the documentary material.

2 Current access to training for precarious and disadvantaged workers

This section analyses to what extent precarious and disadvantaged workers face statutory barriers in access to training. More specifically these groups of workers are defined as

- casual workers (on-call, voucher-based and zero-hour contracts, as well as mini/flexi-jobs)
- temporary and agency workers, and
- self-employed workers (including platform and gig workers).

Fink, Nagl (2018) show that non-standard work is highly regulated in Austria. The varieties of casual workers do not appear in the regulations. Basically, a main legal demarcation is drawn between employee and employer status. “In Austria the persons performing the work and their customer or employer do not have a free choice as to whether they define their relationship as dependent or independent employment. It is the different social insurance providers and other public bodies up to the Supreme Administrative Court who can decide whether an employment relationship classified as

dependent or independent employment.” (Fink, Nagl 2018, 76). More recently new regulations of non-standard work have created new statuses that lie somewhat in between of dependent and self-employment, e.g., free service contracts (Freie Dienstnehmer), marginally employed (Geringfügig Beschäftigte), or new self-employed (Neue Selbständige). Basically, non-standard workers have similar access to training as standard employees. In some schemes (e.g., employer-supported based on collective bargaining, also educational leave) a six-months period of employment is required, and for temporary agency workers a specific fund has been created that provides generous funds which, however, are not much used. Self-employed have to take care themselves, their compulsory interest organization (the economic chamber WKO, to which they have to pay a regular contribution) owns the biggest training provider (WIFI), and they are basically supported by tax deductions. The policies are described in more detail in the following sections.

2.1.1 Policies in Austria at the national level

Until now the main political strategy of dealing with the various forms of non-standard work in Austria is to bring these forms as far as possible under the same social security regulations/conditions as standard employees;¹ at the same time special hardships (concerning contributions, or taxes) are relieved (see ANNEX 7.2 for more detailed descriptions of non-standard work in Austria). A main rationale behind this is besides providing security for the non-standard workers, also to limit conditions for non-standard forms of work in order to push towards quality workplaces that can provide the necessary means for a living, and avoid precariousness. This further also means to close escape routes from social security contributions by ‘creative’ constructions of non-standard work by employers and employees either, because social security is mainly contribution-based with wages as their principal basis, and both sides have to contribute substantially.² The tendency of a declining labor share endangers this system. So, the main strategy is rather to contain non-standard work, than create opportunities for these categories. An important aspect of the system is to hold up a clear separation of dependent employees and employers, because this constitutes a main pillar of the regulatory structure of social security; exceptions/anomalies to this structure are the free service contracts (Freie Dienstverträge, Freie Dienstnehmer) and the one-person-

¹ See for a more detailed analysis the recent OECD study Fink, Nagl 2018

² This overall political strategy has increasingly come under strain and dispute, as it leads to high non-wage labor costs, that are under attack on the one hand by arguments of competitiveness, and on the other hand by arguments concerning employment creation, that would be impeded by a comparatively high taxing of labor (if the social security contributions are also considered).

enterprises (Ein-Personen-Unternehmen, EPUs), that both mix up the separate poles of employers and dependent employees, with the former being organized by the employees organizations,¹ and the latter by the employers.²

Basically adult education is regulated very sparsely in Austria, mainly by a law at central government level that has regulated the distribution of some support funds to a defined set of adult education providers (Erwachsenenbildungsförderungsgesetz 1973, amended 1990, 2003), target groups are not mentioned in this law, and it is rather focusing on educational goals.³ Another mechanism of public support of access to training is the Austrian program of the European Social Fund (ESF) that is partly managed by the public employment service (AMS), and in case of education and training by the ministry of education.⁴ The AMS provides labor market training mainly for the unemployed, non-standard employment is mostly eligible for the unemployment insurance (also the self-employed can voluntarily contribute), and thus also for labor market programs. The support of adult education is focused to target groups without mentioning non-standard employment (main target groups are young school-leavers, unemployed and NEETs, lower qualified people, meaning those without a compulsory education certificate and without a formal vocational qualification, women with care responsibilities, and migrants, the latter being discarded as a target group by the current government, in particular if they are refugees).

Overall, access to adult education is provided through market-like mechanisms in Austria, without a general regulation (only shop stewards have a statutory right for further education).⁵ Collective bargaining provides in some sectors provisions for further education, minimum 6 months working in the enterprise are usually required (see

¹ Much basic information is provided by AK Wien, Freie Dienstnehmerinnen. Rund um Sozialversicherung, Steuer- & Arbeitsrecht <https://wien.arbeiterkammer.at/beratung/steuerundeinkommen/freidienstnehmer/index.html>; see also AK OOE, Freie Dienstnehmer. Wir beraten Sie gerne!

https://ooe.arbeiterkammer.at/ueberuns/kontakte/beratung/Freie_Dienstnehmer.html

² WKO, Im Einsatz für Ein-Personen-Unternehmen (EPU). Alle Informationen für den Einstieg in die Welt der Ein-Personen-Unternehmen (EPU) <https://www.wko.at/service/netzwerke/ein-personen-unternehmen.html>; see also WKO, Ein-Personen-Unternehmen (EPU) in Österreich. Daten Dezember 2017 <https://www.wko.at/service/zahlen-daten-fakten/EPU.html>

³ See https://erwachsenenbildung.at/themen/eb_in_oesterreich/gesetze/foerderungsgesetz.php

⁴ <https://www.esf.at/>; core areas of support are gender equality, active and healthy aging, inclusion (poverty, discrimination, special needs), reduction of early school leaving, access to lifelong learning, employment for job seekers, adaptation to change; within access to lifelong learning disadvantaged groups are considered (special needs, migrants, low qualified) and the elderly, non-standard employment is not mentioned.

⁵ ; https://www.gpa-djp.at/cms/A03/A03_999_Suche.a/1342540184571/suche/recht-auf-weiterbildung-bildungsfreistellung

ANNEX 7.2.6 for examples).¹ Public support mechanisms exist that are mainly targeted to employees, in particular in case of unemployment. Non-standard employees are basically eligible for programs, however, are mostly not specifically addressed as target groups (so it might be said, they are indirectly at some disadvantage). Employers have to care for their adult education mainly by themselves, the employers chamber owns the biggest provider for vocational adult education in Austria (WIFI)² that provides a wide supply; how much it is supported financially is not known. Support of employers is mainly focused on measures provided for the employees, not employers themselves (these and managers as their representatives are rather excluded from support in measures for employees to enterprises). Tax-based schemes (for persons: *Abzugsfähigkeit von Weiterbildung als Werbungskosten*;³ for firms: *Abzugsfähigkeit von Weiterbildung als Betriebsausgaben*,⁴ until end of 2015 specific schemes *Bildungsfreibetrag* and *Bildungsprämie*)⁵ and credit schemes (Bildungsbauparen, Bildungsdarlehen) exist for both, employees and employers (Wagner, Lassnigg 2006).

Some bigger support programs for subsistence during adult education (Bildungskarenz, Bildungsteilzeit, Fachkräftestipendium) are specifically targeted at employees, funds are not transferred to employers, rather to adult education providers and to individuals. One-person enterprises are specifically organized and to some extent supported within

¹ „Mit Ausnahme der Bildungsfreistellung und der Mitwirkungsrechte des Betriebsrates bei der innerbetrieblichen Aus- und Weiterbildung ist Aus- und Weiterbildung im Arbeitsrecht nicht bzw. nur unzureichend geregelt. Lediglich das Berufsausbildungsgesetz regelt genau die Ausbildung von Lehrlingen. Der Kollektivvertrag nimmt in einigen Branchen einen sehr wichtigen Lückenschluss vor. Dies betrifft vor allem die Möglichkeit der Inanspruchnahme von Bildungsmaßnahmen, die Rückerstattung von Ausbildungskosten oder bezahlte Freizeitansprüche.“ https://www.gpa-djp.at/cms/A03/A03_2.1.a/1342540582574/kollektivvertrag/alles-ueber-den-kollektivvertrag/aus-und-weiterbildung
² <https://www.wifi.at/start>

³ The condition for this scheme is only some employment period in the year of training (unemployment also counts in this respect) and a relationship of education/training participation to employment. The conditions for deduction are quite generous and include the various components of training costs (fees, material, part of computer, transport and accommodation, partly per-diems) for participation up to programs in formal and higher education; see https://www.bmf.gv.at/steuern/arbeitnehmer-pensionisten/arbeitnehmerveranlagung/abc-der-werbungskosten.html#Aus_und_Fortbildung_Umschulung. Estimations about the amount of this support could be done, however, are not available according to information by the ministry of finance.

⁴ Estimations about the amount of this support are not available according to the ministry of finance.

⁵ This concerns costs of the entrepreneur, as well as payments for employees, if the education and training is necessary for running the firm (betriebsnotwendig or im betrieblichen Interesse); see <https://bildungsfoerderung.bic.at/allgemeine-informationen/steuerliche-foerderung-der-beruflichen-bildung>; the schemes have in effect increased the deduction to 120% of costs; however, this incentive was estimated as being too weak and therefore skipped, so the normal deduction remained; see https://www.usp.gv.at/Portal.Node/usp/public/content/home/thema_des_monats/steuerreform/171828.html#Bildung

Estimations by the ministry of finance about the amount of taxes forgone because of these measures were EURO 27 to 29 million per year 2010-15 at the national level (https://www.bmf.gv.at/budget/das-budget/Foerderungsbericht_2012.pdf?67rukf; https://www.bmf.gv.at/budget/das-budget/Foerderungsbericht_2015.pdf?67ruo4), the share of Upper Austria could be EURO 4 to 5 million, compared to the support through Bildungskonto of 7,6 million in 2017

the employers’ chamber (compulsory membership), however, specific measures other than the Bildungskonto are not specifically mentioned. Temporary and agency workers are targeted by a specific law (Arbeitskräfteüberlassungsgesetz 1988, many amendments until 2018)¹ that includes a specific training fund² for this group of enterprises, financed by compulsory contributions by the firms (agencies), matched by funds from the unemployment insurance (para 22a-g). Such funds have been discussed for a long time already also for other branches or sectors, however, have not been realized. The fund for temporary and agency workers has been mentioned as a pilot, however, has also come under critique because of slow implementation and some problems in its construction.³

The current government seems to reduce emphasis on adult and further education policies; it is not clear whether this is a deliberate decision, or has rather occurred in bypassing. In any case, the government program does not mention this sector. The lifelong learning strategy from 2011 (Republik Österreich 2011) has also generally lost impetus (Lassnigg 2018),⁴ and in the discourse about digitalization a proposal of a completely new strategy about further education has been proposed (Verein Industrie 4.0 Österreich 2017). In adult education the 2011 strategy has in particular not succeeded in developing a strategy for the public support of adult education. The ideas to develop the financing and governance of adult education have not been successful, because the government was not willing to provide additional financing. The basic idea has been to develop a kind of generalized Bildungskonto (educational account), that in a full version would consider all public expenditure for education, and provide an equitable amount for each individual.⁵ More recently these ideas about the overall public funding of education have been reduced to adult education only, with the central

¹ <https://www.ris.bka.gv.at/GeltendeFassung.wxe?Abfrage=Bundesnormen&Gesetzesnummer=10008655>

² This fund should not be confused with the above mentioned European Social Fund (ESF) that provides a broad program of support, including education and training measures.

³ The contributions have been reduced in 2017, because of an accumulation of high amounts of money that has not been used https://www.ots.at/presseaussendung/OTS_20170215_OTS0232/leiharbeit-beitraege-an-weiterbildungsfonds-werden-voruebergehend-reduziert; another critique concerns some mismatch between contributions and limitations of claims for the big enterprises in the sector, <https://kurier.at/wirtschaft/sozialfonds-hortet-millionen/223.969.096>

⁴ The government based strategy was signed by four ministers (education, labor, science, economic affairs), and has in NPM-manner not been not legally anchored; in the meantime all of them have left politics, so no one is responsible at the moment at this level.

⁵ A main topic behind these considerations lies in the fact, that in Austria higher education is still mainly publicly financed on the one hand, and the substantial proportion of people taking an apprenticeship pathway that is financed mainly by enterprises and the lower wages of apprentices themselves, receive substantial less public support in their educational career. A generalized account could put this on a more equitable basis, however, the stakeholders could not agree, where to set the threshold for the account (mainly the question of the treatment of higher education as public or private responsibility could not be resolved; see also FSG 2004, ÖAAB 2007).

government matching some sources provided by individuals and regional governments. However, these ideas have not been further concretized so far.¹

2.1.2 Policies in the region of Upper Austria

In Upper Austria some categories of non-standard employment were gradually included into the ‚Bildungskonto Oberösterreich‘. Actually, the following non-standard categories are explicitly mentioned in the regulation:²

- new self-employed through one-person-enterprises (2010),
- freelance service contracts (2015),
- marginal employment (2015),
- small employees with maximum five FTE-employees (2015).

Others are not mentioned explicitly (labor leasing/temporary employment, see funds; fixed-term employment; digital forms of work, see industry 4.0 initiative), but can in principle access the scheme.

The approaches of adult education policies developed in Upper Austria developed (see a closer description in ANNEX 7.2.4) have focused on medium level qualified employees (mainly holders of an apprenticeship certificate), and the low educated. Non-standard employment has not been specifically targeted during the 1990s and 2000s, but was not formally excluded either.

An overview about the current support measures in Upper Austria gives the following items (Webpage bfi Oberösterreich, an Austrian overview is given by AK,³ see an earlier overview in Wagner, Lassnigg 2006):⁴

Support for individuals (Förderungen für Privatpersonen):

- AK-Bildungsbonus (regional): members of AK (that are all employees in the region because of compulsory membership) can apply for actually up to EURO 130,- voucher that can be used for (a part of) payment for a wide range of designated courses in languages, IT, book keeping, accounting, selected personal or basic competences, managed and paid by AK

¹ This issue has been mentioned by one of our interview partners as a main unresolved current topic.

² Summary in Land OOE 2017, p.3 „Förderbar sind Personen mit Arbeitnehmer/innenstatus, freie Dienstnehmer/innen, geringfügig Beschäftigte, Kinderbetreuungsgeldbezieher/innen, Wochengeldbezieherinnen, Wiedereinsteiger/innen, Arbeitslosengeld- oder Notstandhilfebezieher/innen, Einpersonenernehmen sowie Kleinunternehmer/innen (mit maximal fünf (VZÄ) Beschäftigten) sowie Akademiker/innen mit maximal 2.200 Euro Bruttoeinkommen pro Monat.

³ <http://www.bildungsfoerderungen.at/uebersicht.php>

⁴ <https://www.bfi-ooe.at/de/service-foerderungen/unsere-serviceleistungen/bestellung-bfi-kursbuch.html>

- Bildungskonto (regional, our measure)
- Bildungskarenz (national): educational leave for people eligible for unemployment compensation and employed continuously at least six months with the current employer, they are entitled during a maximum leave period of one year within four years for receiving the amount of the unemployment insurance payment for training purposes (16 hours learning per week must be testified), this is a right conditional on a formal agreement with the employer testified participation in training
- Bildungsteilzeit (national): part-time educational leave, reduction of working time by 25% to 50%, but now below 10 hours (10 hours learning per week required), part-time and full-time leave can be combined, the measures are managed by the AMS, and paid from the unemployment insurance funds, this is also a right conditional on a formal agreement with the employer and testified participation in training
- Bildungsbeihilfen AMS (national, regionally delivered): Several support measures within labor market policy, conditional on counselling and improving employment opportunities, the whole costs including living expenses can be paid within these measures
- Bildungskosten absetzen (national): Costs of education to be used for occupational purposes can be deducted from the wage tax, including costs for travel, living abroad, material, literature.
- „Du kannst was“ (regional): Employees with occupational experience can be accredited for this and with the necessary additional learning acquire an apprenticeship certificate, this is a regional program in co-operation of a firms’ network supported by the regional government, the social partners and educational providers
- Fachkräftestipendium (national): a grant at the level of the minimum collateral (Mindestsicherung, about EURO 30,-- a day), for non-employed, persons on leave, or former self-employed who must be inactive, but were employed for minimum (cumulative) four years within last 15 years, educated below higher education, for living expenses during an education of 20 hours per week through minimum 3 months up to maximum three years, providing credentials for upgrading or demanded occupations specified by a list; the measure is managed by the AMS, counseling is conditional
- Fit Programm (national): supports acquisition of credentials at minimum level apprenticeship by women in craft or engineering fields, including counseling, coaching and several supportive measures, living expenses at the level of unemployment compensation plus a small premium for additional costs, managed by AMS

- Lehre mit Matura (national): supports the acquisition of the upper secondary Maturity exam beside apprenticeship training (free preparatory courses and exams)
- Pflichtschulabschluss (national): part of Initiative Erwachsenenbildung (IEB), supports the costs of acquisition of the credential of compulsory education by specified curricula with individualized support, not living expenses, paid by the regional government matched by the central government (formal constitutional agreement)
- Studienbeihilfe (national): grant for living expenses for higher education students, includes a part for experienced students who have worked for some years, and then get a special higher rate (Selbsterhalter-Stipendium); the age limit for a regular grant is 30 years at start of studies (with some extensions, e.g., in case of children, or master studies), in the scheme for experienced students the age limit is extended up to 35 years dependent on the duration of employment.¹
- Bildungskredit (national): a quite common scheme for building-saving (Bausparen) that is publicly supported by a premium can also be used for a loan for education or training²

Discounts at the employees' provider bfi (Ermäßigungen exklusiv am BFI) that is financed by the bfi, which is owned by the AK

- AK-Leistungskarte : provides 10% reduction in first place for members of AK for selected courses, up to maximum EURO 90,--
- Initiative Fachkräfte: additional reductions of 20% to 25% for specified courses in demanded occupations, for external apprenticeship exams and "Du kannst was!" explained above
- Lehrlingsermäßigung: apprentices receive 50% reduction for courses additional to their curriculum
- ÖGB Ermäßigung: further reductions of 20% (maximum EURO 35,--) for members of the trade unions, and special support for selected programs for members of the (biggest) white collar trade union (GPA-DJP).

A specific tool for the calculation of support is provided at the webpage of the provider (Förderrechner), and several examples of calculation are given in the program.

¹ <https://wien.arbeiterkammer.at/beratung/bildung/studium/Selbsterhalter-Stipendium.html>;

<https://www.stipendium.at/studienfoerderung/beihilfe-beruf/selbsterhalterinnen-stipendium/voraussetzungen/>

² <https://www.sbausparkasse.at/de/finanzieren/komme-was-wolle-darlehen-fuer-ausbildung-und-weiterbildung>

Figure 1: Tool for calculation of support related to course costs

Wie viel kostet mich der Kurs?

Nutzen Sie unseren interaktiven Förderrechner zur schnellen Ermittlung Ihrer möglichen Förderungen und Ermäßigungen für Ihre gewöhnliche Aus- bzw. Weiterbildung.

Bitte beachten Sie: Prüfungsgeldern sind keine Förderungen und Ermäßigungen ausgenommen!

Kurspreis 0,00 €

Fördersumme berechnen

<input type="checkbox"/> - AK (10%, max. 50 €) Mehr Infos	0,00 €
<input type="checkbox"/> - AK (20%) (20%, max. 100 €) Mehr Infos	0,00 €
<input type="checkbox"/> - AK (25%) (25%, max. 200 €) Mehr Infos	0,00 €
<input type="checkbox"/> - ÖGB (20%, max. 37 €)	0,00 €
<input type="checkbox"/> - Lehrling (50%)	0,00 €
Zwischensumme 1:	0,00 €
<input type="checkbox"/> - AK Bildungsbonus (40%, max. 130 € für Kurse mit Beginn ab 01.01.2017)	0,00 €
Zwischensumme 2:	0,00 €
Bildungskonto	
- Förderung für Arbeitnehmer	
<input type="checkbox"/> Sprachkurse (30%, max. 1000 €)	0,00 €
<input type="checkbox"/> Alle anderen Kurse (30%, max. 2000 €)	0,00 €
- Förderung für Personen mit erhöhtem Anspruch	
<input type="checkbox"/> Sprachkurse (60%, max. 1000 €)	0,00 €
<input type="checkbox"/> Alle anderen Kurse (60%, max. 2400 €)	0,00 €
Endsumme:	0,00 €

Bitte beachten Sie, dass diese Berechnung nur als Basisinformation gesehen werden kann, um Ihnen einen möglichen, für Sie individuellen Richtwert, liefern zu können, je nachdem welche Ermäßigungen und Förderungen für Sie relevant sind.

Die Berechnung des Bildungsbonus des Landes OÖ richtet sich nach den Vorgaben für den Zeitraum 2015-2018 und tritt für alle eingereichten Anträge seit 01.03.2016 in Kraft.

Source: bfi web page <https://www.bfi-ooe.at/de/service-foerderungen/ermaessigungen-exklusiv-am-bfi/foerderrechner.html>

Because the various forms of support are cumulative, quite high rates of reduction for individuals are possible.

Förderungen für Unternehmen

- Arbeitsplatznahe Qualifizierung für Arbeitslose AQUA: unemployed persons, who need not be entitled for unemployment benefit receive an individualized combined course and on-the-job training, with support of living expenses and complete training costs, paid by the AMS, the regional government, and the enterprises according to given amounts (unemployment compensation + EURO 60,-- + EURO 93,-- per month + training expenses)
- Förderung der Lehrausbildung: support of additional costs for apprenticeship training enterprises
- Implacmentstiftung: complex foundational constructions for financing (quantitatively) relevant (bedeutsam) additional qualification demand on the side of specific enterprises

- Innovative Skills für KMUs: in case that AMS cannot support a firm, the regional government supports training costs for SMEs according to EU definition in the fields of IT, export, technology and languages; the conditions are similar to Bildungskonto, with higher rates for smaller enterprises
- Lehre fördern: support of enterprises for apprenticeship training under certain conditions
- Qualifizierungsförderung für Beschäftigte: for certain target groups (unskilled, medium level qualified women below 45 years for upskilling/upgrading, persons over 45 years for adaptation to age specific tasks or new skills), training costs and for longer courses, or unskilled persons also (part of) wage costs (free service contracts are included for training costs not for wages, excluded are marginal employees, owners and managers, employees of personnel leasing firms)
- Weiterbildung für Ausbilder/innen: pedagogical competences for certified apprenticeship trainers.

2.1.3 Summary target groups

As far as regulations exist, non-standard employees have formally equal access to most measures, however, some bias can be seen, as they have not been specifically targeted for support measures until recently. Labor leasing was regulated 1988, and a training fund was established 2013, and one-person enterprises were included in the Bildungskonto 2010, and free lancers, marginally employed, and small entrepreneurs in 2015. Support of adult education, in particular by labor market policy, is generally targeted more towards employees than to employers. Funds are mostly distributed to individuals and to education providers, not to enterprises. Collective agreements are very dispersed,¹ and we did not find an overview about how training is tackled in collective agreements (see some examples in ANNEX 7.2.6).

The Austrian policy discourse about lifelong learning and adult education has been rather structured by institutions and goals than by target groups.

The financing and governance system is highly scattered, with a main responsibility at the regional level and very different conditions for access across regions. Attempts to streamline the financing and governance structure have not been successful so far.

Concerning target groups, a main emphasis has been laid on disadvantaged youth, women returning to employment, adults with low qualifications or competences, and

¹ The trade unions' platform about collective bargaining includes more than 800 individual items
http://www.kollektivvertrag.at/cms/KV/KV_1.4/kollektivvertrag-suchen/alphabetische-liste

migrants. Employment relations have not been much emphasized in the adult education policy discourse.

Non-standard employment has been rather tackled by labor regulation and collective bargaining, e.g., by regulating labor leasing, or trying to prevent irregular self-employment (*Scheinselbständigkeit*) that affects social security contributions and social protection (and is a hotly contested political topic). Gradually some categories of non-standard employment have been integrated into the regulation of the OOE *Bildungskonto*.

In the measures for the support of enterprises certain groups of employees are included (unemployed without entitlement for compensation, free service contracts), small enterprises are specifically supported, other groups are excluded (marginal employees), mainly for precluding a shift of employees to this status.

3 Description of the rules of the ‘Bildungskonto Oberösterreich’

This section provides a detailed description of the ILA scheme and how it functions. As already stated, the *Bildungskonto* is designed rather virtually as an ILA, as there is a political promise to draw on a certain amount of money related to further education under certain conditions; however, a personal account does not exist, but an individual, who participates in a predefined adult education measure, and completes it, can *afterwards* apply for a refund of a part of the direct expenses for the measure, according to the specifications of target groups.

The conditions are fairly clear, and the providers also inform through various channels about the refund through the *Bildungskonto*. However, the application is inspected by the administration, thus there can be no 100% guarantee about the money in advance (what would be the case with an account); if criteria are met the support is paid (there is information about rejection of about 5% of applicants for some period), however, it is also officially stated that the budget can be restricted by political decision (it is part of discretionary expenses, not a right). Moreover, the applicant has normally (with some exceptions) to pay the fees by his/her own money in advance (in some exceptional cases the providers find special solutions, e.g., only the personal part must be paid in advance, and the administration pays the supported part directly to the provider).

Basically, a certain proportion of the expenses is refunded (varying by specific target groups), up to a certain maximum amount (also varying by target groups, and measures;

e.g. language courses have a lower maximum amount) that can be consumed within one year (also by more than one participation), the end of this period is clearly specified by date according to the service year of providers. The maximum amount of refund can thus be seen as an approximation to a (virtual) ILA

The final date for the application is within six months after completion of the education measure, the scheme can be used up to the specified maximum amount of support per year, and for several times in different years (not documented in the data documentation).

3.1 Stated objectives of the scheme

The stated objectives of the Bildungskonto were a general increase of participation in vocationally oriented adult education by medium and low-level workers (with a focus on holders of an apprenticeship certificate, who are the main category among this group), who had less participated in AE (Bauer, Hofer 1999, 154-156), , and still do. The current statement at the regional government’s webpage gives the same rather general message, a bit more unspecific, to support vocationally oriented further education and retraining that meets the economic demand and the interests of the people.¹

Only documented direct expenses for the education programs or courses (‘Kurskosten’) are funded (expenses for travel, accommodation, food, literature/material, or exams are excluded from support). In case of retraining to another occupation (‘Umschulung’) the content must be applied in employment within one year, and this needs to be verified by a statement from an employer.² Living expenses are not covered by the scheme, however, can be matched to it from other schemes (Bildungskarenz, Bildungsteilzeit).

The basic philosophy of the scheme is to give the participants as much freedom as possible to decide about participation according to their interests and motivations,

¹ „Oö. Bildungskonto. Das Bildungskonto ist schneller, zielsicher und kundenfreundlicher gestaltet und bietet somit mehr Service und Vorteile für die Oberösterreicherinnen und Oberösterreicher. Bildung als spannenden und positiven Lebensbegleiter für jede und jeden Einzelnen in unserem Land zu etablieren ist die zentrale Aufgabe der Erwachsenenbildungspolitik. Um den vielfältigen Anforderungen der heutigen Arbeitswelt gerecht zu werden, benötigen wir Erwachsenenbildungsangebote, die sich bestmöglich am Bedarf des Arbeitsmarktes und den Interessen der Menschen orientieren. Mit dem Bildungskonto fördern wir in Oberösterreich die berufsorientierte Weiterbildung und Umschulung und leisten damit einen wichtigen Beitrag zur Arbeitswelt. Nutzen auch Sie das Bildungskonto und nehmen Sie Ihre Zukunft selbst in die Hand. Weiterführende Informationen: Förderung Oö. Bildungskonto: <http://www.land-oberoesterreich.gv.at/170925.htm>“ (Land Oberösterreich 2018)

² In the interviews several partners have explained that this regulation mainly applies as a preventive measure in the health sector, where during last years many courses/programs have been supplied in particular for returning women that turned out to have no value in the labor market. So the applicants must secure this value with potential employers, in order to be sure to receive the refund of training costs.

steering towards most demanded skills is not directly possible through the scheme (this must take place rather through the decisions of the providers about their supply), only some steering might take place through specific information and advertisement of certain programs or courses, or through guidance and counselling, which, however, is provided by separate institutions.

3.2 Current access regulations

The access regulations have gradually changed stepwise over time. The current regulations in place for the years 2015-18, adopted in December 2017, are as follows (<https://www.land-oberoesterreich.gv.at/170925.htm>), with some specific changes according to the date of begin of participation before or after 1.1.2018:

3.2.1 Who can access the scheme?

The access regulations to the financing scheme may be somewhat confusing at first sight, because the application takes place and is evaluated *not before* accessing training, but within a period of six months *after* the training was completed (until 2009 the period was only three months). Thus, the access criteria do not refer to the access to training but to access to ex-post financing. The access criteria do not only refer to characteristics of the participating individuals or target groups, but also to characteristics of the training program and the training provider. Based on the construction of the measure, access can be modeled as a two-step process, the first step being the decision to participate in a training program (access to training), and the second step being the decision to apply for the funding through the Bildungskonto (access to the measure). In principle, a participant can decide to access training even without knowing about the Bildungskonto (first step), then being informed by the provider about the potential support and decide to apply for refund (second step).

Basically, the financial support through the Bildungskonto is restricted to the following list of officially given criteria, including attributes of residence, training, and personal, referring more often to characteristics of the training measure than to personal characteristics, and including also explicitly some specific categories of employment statuses, also referring to non-standard employment. The following criteria apply that restrict participation

- to *residents* in the region of Upper Austria (Oberösterreich), in the earlier period also the work place in Upper Austria for residents in neighboring countries applied as criteria¹

¹ This was abandoned when the neighboring regions also developed similar schemes

Criteria of the training measure, partly evaluated ex-post

- to participation with *providers* who are certified by regional or federal quality frameworks¹ or are based on public law,
- to participants who have *attended at least 75%* of the education measure (this is measured by time of attendance in course/program lessons testified by the provider and has to be routinely included in the application)
- to *vocationally oriented* programs or courses (including language and personal competences), leisure/hobby courses and basic driving license courses are explicitly excluded; degree programs in higher education are also explicitly excluded, non-degree programs might be supported.
- minimum *training expenses* of EURO 100.— are a lower threshold for application for refund (courses with lower costs are not eligible because of high administration costs relative to the potential amount of refund, this threshold was established at EURO 90.—in 2010).²

Further official specifications of basically eligible target groups are the following (these are the groups eligible for support, the specification of the amount of support is mainly based on additional criteria, e.g., previous educational attainment with higher support for low educated, whether the program aims at a formal credential that receive higher support, and older age that also entitles for higher support)

- *employees* with an active employment contract
- formerly employed people on *maternity leave*, and interrupt employment for at least six months
- *returners* after maternity leave, who interrupt employment for at least six months, are registered at the employment service, but do not receive benefits
- *marginally employed* (regulated employment category of '*geringfügig Beschäftigte*' as a kind of mini-jobs; since 2015)
- persons who receive *unemployment* compensation or emergency *financial aid* ('*Notstandshilfe*')
- *free lancers* (regulated category of '*freie Dienstnehmer*', since 2015)
- *one-person* entrepreneurs (since 2010), and *small* entrepreneurs with maximum five (FTE) employees (since 2015).

¹ Those quality frameworks are: Qualitätssiegel der Oberösterreichischen Erwachsenen- und Weiterbildungseinrichtungen (EQB) <http://www.ibe.co.at/ebqs.html>; Ö-CERT Qualitätsrahmen für die Erwachsenenbildung in Österreich <https://oe-cert.at/>

² A lower threshold existing in the early period (then ATS 2.000, about EURO 150.--) was discontinued, because it was estimated to drive up prices of education providers to be included in the program.

The regulations also explicitly mention categories of *who is not entitled* to the measure: persons registered at AMS but were not employed so far, persons in old age pension. Persons who own a higher education credential, or participate in programs in higher education institutes that provide an academic credential have been treated differently over the course of time, and have also been a point of dispute between stakeholders. For some periods persons with a higher education credential were entitled if they earned a low wage, and certain programs in higher education institutions could/can also be supported. In addition, employers (except one-person and very small entrepreneurs), and persons without any employment experience are not entitled to the measure.

In the early period of the scheme the main part of the scheme was only targeted to low or medium level educated persons, meaning that the upper limit was set with holders of an apprenticeship certificate or graduates of medium level vocational schools at upper secondary level. The Austrian education structure is differentiated to two levels at upper secondary school, a medium level vocational school (mostly 3 to four years), and an advanced level leading to the Matura exam (Reifeprüfung), that basically provides access to university. Advanced level institutions exist within general education (the academic school AHS, Allgemeinbildende Höhere Schule), and within vocational education also, where a five years college is established in various fields, that also provides the Matura exam (called BHS, Berufsbildende Höhere Schule, whose final two years have been classified as short cycle tertiary in the revised ISCED classification). In the early period of Bildungskonto a hot debate has evolved about whether the completers of the advanced level of upper secondary school should be eligible for the scheme or not, because of their much higher participation in further education. The fear was that opening the scheme for that group would endanger the compensatory goal because of strong inflow of this group into it (see the section about evaluation below). Finally, the scheme was opened for this group.

3.2.2 What are the eligibility criteria?

The eligibility criteria to the support concern mainly the eligibility to different amounts of support, distinguished by a variety of criteria: labor market status (employment interruption because of child care responsibilities); characteristics of the training measure (providing formal credentials, language courses), personal characteristics (older age, low educational background).

Main distinctions of eligibility are made between *basic support* (Normales Bildungskonto) here the list of criteria in 3.2.1 above applies) and *higher support* (Erhöhtes Bildungskonto) under specific conditions. Basic support currently means that 30% of training expenses with a maximum amount of EURO 2.000 are refunded.

Participation in language courses reduces the maximum amount refunded to EURO 1.000.

Eligibility to higher levels of support (60% of training expenses, maximum amount of EURO 2.400) is in place for certain groups/under certain conditions:

- child care and returners from maternity leave
- preparation courses for an external permission to sit the final examination of apprenticeship¹
- German language courses for the purpose of integration (levels A1, A2, B1, B2)
- employees above 50 years, with monthly gross income below EURO 2.200.—
- persons with maximum compulsory education completed, and without a vocational credential

3.2.3 Are some groups of workers/persons targeted in particular?

Targeting of certain groups mainly occurs through the differentiation of the amounts of support described under the eligibility criteria (3.2.2 above). Thus, targeting of groups of workers takes place at two layers:

- within *basic support* the groups of marginally employed, free lancers, one-person entrepreneurs, and very small entrepreneurs are targeted
- *higher levels of support* receive specific target groups: low educated, elderly, persons who interrupt employment because of child care, basic German language learning for migrants, low educated who prepare for the external apprenticeship exam
- low qualified persons who train for the access to a *formal medium level credential* (Abschlusszeugnis, e.g., apprenticeship, Maturity for higher education access) are an additional target group, that also receives a higher amount of support.²

¹ This opportunity is regulated in the Vocational Training Act

² Until 2009, this part was also supported with residence and travel costs. „Alle Weiterbildungsmaßnahmen, die mit einem Abschlusszeugnis enden, werden dabei im Rahmen des speziellen Bildungskontos mit einer höheren Förderobergrenze unterstützt. In diesen Fällen ist auch zusätzlich die Förderung von Unterkunftskosten möglich.“ (LRH OOE 2009, p.3)

3.3 Resources involved

The basic rationale of the establishment of the Bildungskonto was to shift public support from the adult educational institutions to individuals (wording: Subjektförderung vs. Objektförderung for money to providers), to allow for choice of education and training within certain limits, and to increase participation of medium and low educated workers.

The resources should relieve participants from direct education and training costs, and at the same time provide incentives for participation, with some room for steering through differentiated public contributions.

3.3.1 Amounts of resources spent

The amount of resources spent derives from the eligible participants. It is basically decided by the regional parliament as part of the regional public budget; however, there is much room of discretion for the regional government to vary the funds.¹ There are several examples in the evaluations that point to mechanisms of flexible adaptation of the funds to the demand in the past periods, depending on the political will of the government.² As there is no definitive legal entitlement to the measure, an upper threshold of the amounts of resources can be directly established. In the regulation 2010-14 it is explicitly stated that the funding is limited by the planned fund in the regional budget (Landesvoranschlag). An indirect possibility of steering the amount of resources is given by varying the concrete regulations of support, mainly the proportions of refunding training costs. This variation can work through two mechanisms, first the

¹ In the regional budget the Bildungskonto is still not documented in the section of education but in the section about economic support (Wirtschaftsförderung), and it cannot be found under its title Bildungskonto but under 1-781905-7690 001-Beruf. Fort- u. Weiterbildung u. Umschulung, sonst. Zuwendungen an Einzelpersonen (ANP), the figures are for 2017 Voranschlag: EURO 8.319.500, 2016 Voranschlag: EURO 8.319.500, 2015 Ergebnis: EURO 10.401.976,81, G743-31-E14.

Some part of the expenditure (EURO 1.017.216,50) can be found in the Förderbericht 2017 (<https://www.land-oberoesterreich.gv.at/60259.htm>), Wirtschaftsförderung, Förderung von Handel, Gewerbe und Industrie, Bildung und Beratung, Beruf. Fort- u. Weiterbildung u. Umschulung, sonst. Zuwendungen an Einzelpersonen (ANP) 1/781905/7690/001, Referent: Landesrätin Mag. Haberlander: <https://www2.land-oberoesterreich.gv.at/internetfoerderbericht/Start.jsp>, pdf-document 1539840461464Person.pdf ; in this document personal names of participants are displayed, most of them with a sum of EURO 2.000,00 that amounts to the maximum amount of support at that time period.

² The assessment by the regional court describes differences between the foreseen budget and the actual expenditure that was covered by adaptations between successive years (e.g., 2008 and 2009), and additional decisions by the regional government within its room for discretion (2009: additional EURO 750.000,-).

The responsible politician from 2009 responds to the critique of the regional court of audit by stating that already in 2001 a lasting political agreement has been taken that an occasional additional financial demand will be covered by the regional government: e.g., 80 million ATS (about 6 million EURO) were reserved in the preliminary budget for 2002 (Voranschlag), and additional 20 million ATS (additional 25%) were reserved in a regional future fund, and if this would not be enough, an additional decision had been agreed to cover that in the budget for adaptation (Nachtragsbudget) for 2002 (LRH OÖE 2009, Annex, letters).

budget depends directly on the proportion of funding; second the variation of funding can also work indirectly by influencing participation.

During the first years of the establishment of the Bildungskonto the amount needed had to be found in practice, because the budget had to be decided in advance, when the realized participation was not known. There were indeed some discrepancies as participation exceeded the decided budget, which were resolved first by a promise from the side of politics to secure the budget needed; and second by shifting the timescale of the expenses. As result there was some delay in refunding participants during some of the beginning years.

More recently, under the dictate of public saving, the proportions of refunding were reduced, and in parallel the expenses have taken a new and stagnating path compared to earlier periods. Some interview partners have indicated that the savings might have been too severe, and parts of the foreseen budget would be left over.

3.3.2 Regulations and practices of financing and administration of *Bildungskonto*

3.3.3 Are some groups of workers/persons targeted in particular?

The scheme is financed from the budget of the regional government, the regional parliament has to decide periodically about the amount of resources (if the maximum amount is spent, some flexibility is possible, normally new decisions must be taken, or financing might be postponed, because there is no formal right to receive the support, applications might also be rejected because of lack of funds). New regulations (Richtlinie) are passed every three to four years; see section 3.7 about reforms for more information.

Following the basic mechanisms of an ILA-scheme, funds spent by the individual participants are matched by funds from the regional government, other financial contributors are not directly involved in the scheme; there are indications from interviews that some training providers support participants – in particular from disadvantaged groups – by only charging the mostly small part of training costs that remain with the participants after refunding (in agreement with the regional department the refund is paid directly to the provider in these cases), or providing forms of credit to the participants (so they have not to pay the whole training costs in the beginning); these practices were mentioned in some of the interviews, mainly with organizations from the employee side (bfi, AK), and this practice is rather rare (concerned mainly language courses for migrants). Other support funds for participants might be matched to the

scheme (e.g., educational leave for subsistence, or additional support by the Chamber of Labor, see below section 3.5), however, it must be secured by the delivery of recipes that support does not exceed the training costs.

Support of employers through the Bildungskonto is not intended. Indications were mentioned, that some of them might shift funding from their own responsibility (or through other – more complicated – mechanisms of support) to the Bildungskonto.¹ The basic logic of public support of adult education or training in Austria depends very much on the distinction of firms’ vs. individuals’ interest; in case of firms’ interest the firm would have to care and pay for the training. The Bildungskonto supports the individual interests, however, support by the firm would indicate a firm’s interest, and therefore this would be an abuse of the scheme in this logic. Consequently, information about this is not available.

The scheme is administered by the regional administration, a shift between the responsible unit has occurred in 2008.² Until 2007 the scheme was administered by the trade department of the regional government. Due to a reorganization from beginning of 2008 the responsibility was shifted to a subunit (Referat Erwachsenenbildung) of the newly established directorate for education and society (Direktorat Bildung und Gesellschaft), where it still resides. As explained above the financing of the scheme is on the one hand regulated by the terms of reference (Richtlinie) periodically decided by the regional government that includes the conditions for access, the target groups and their eligibility (this constitutes the demand for funds), and on the other hand as part of the regional budget by the regional parliament (this constitutes the supply of funds). The provision of funds must be estimated beforehand at the political level.

The scheme is financed by the participants and by funds from the regional government. As the refunding is based on a proportion of overall training costs, the respective contributions of the individuals and the public are regularly documented. The current average proportion of state and individual contributions to training expenses is 40% to 60%, it has gradually reversed from 60% to 40% since 2009.

The sub-unit of the regional administration receives the applications, has to inspect them, and decides about the financing. Because the application and the financing occur after finishing the training, the sources of mistakes are mainly on the side of the applicants, and if a positive decision is taken, the administration is responsible for that.

¹ Training providers have indications for this, when groups of participants from one employer in a course demand individual recipes; this is indirectly interpreted as a measure necessary for the firm that normally must be financed by the employer (see ANNEX 7.2.6 example 3)

² “ Bis zum Ende des Jahres 2007 war die Abteilung Gewerbe für das Bildungskonto verantwortlich, mit 1.1.2008 wurde die neue Amtsorganisation in der Landesverwaltung umgesetzt. Seither liegt die Verantwortung für das Bildungskonto in der Direktion Bildung und Gesellschaft (BGD), Referat Erwachsenenbildung.“ (LRH OOE 2009, p.3)

Only if deliberately false information is given in the applications, money must be called back. This occurs very seldom as an evaluation has shown in LRH OOE 2009 (during the two years of 2007 and 2008 only 14 reclaims are reported, in relation to 36.984 applications in these years this amounts to 0,04%).

In a wider sense, the delivery of the measure involves more actors that are situated outside of the administration. Interaction of them with the administration is important in cases when the support should work as incentive for participation. For applicants who need the support in order to participate in training, a clear expectation about eligibility to refunding after the participation must be established in advance. Clear regulations are one part of establishing these expectations; cooperation between the involved actors is another part. Two kinds of actors are of high importance in this respect, the training providers, and occupational and educational counseling and guidance institutions. Information about the measure and about the expectation of refunding is a key element in this structure.

Different types of access to the measure can be distinguished. A first type is applicants who have taken the decision to participate in training anyway, and have been informed by the provider that they would be eligible to refunding; in these cases, the measure did not influence participation, and could be seen as deadweight. A second type is applicants who were informed about the scheme beforehand and have taken the decision to train under consideration of the support. In these cases, the measure could have influenced participation. A third type is applicants for whom the expected support was decisive for their participation in training. In these cases, participation would have definitely increased because of the scheme, and this type was the most intended one, at least on the side of the employees' representatives. The third type was supported by the counselling institutions of the Chamber of Labor and by the training providers owned or influenced by the employees' representatives. Quantitative information about these types is unfortunately not available.

In the early period¹ a close cooperation between these institutions took place at different levels of regulation and delivery. The social partners together with the regional politicians in a coalition between the Christian Democrats OEVP and the Social Democrats SPOE (each related to one side of the social partners) have devised the regulations, and the counseling and training institutions have closely cooperated with the administrative unit. This cooperation took place at a case by case level: if eligibility was unclear in the counseling process, the administration was contacted, and the case was resolved beforehand. The regulations were also cooperatively developed and

¹ The main source of this information is the interview with the two representatives of the Chamber of Labor who thoroughly described the development and delivery of the measure.

updated, based on practical experience. The representative in the regional government for finance has also guaranteed to find the necessary means for funding, and the Chamber of Labor was closely related to this representative of social affairs in the regional government. This actors’ constellation lasted for almost fifteen years of delivery of the scheme. However, since the first half of 2000s, when the political constellations started to change stepwise, the actors’ constellation has also changed, in particular on the political level, however, the measure was quite established, and cooperation at the level of delivery still prevails, at least on a more limited scale.¹

3.4 Kinds of training supported

Within certain demarcations given by the regulations about access, eligibility and targeting the applicants should have room for choice of courses and programs. Main demarcations of kinds of training are

- non-formal or formal ‘vocationally oriented’ courses and programs, including language and personal competences
- given by accredited providers
- mainly at medium skilled level (excluding or restricting higher education, in the early period the advanced level of upper secondary level was also excluded, see section 3.7 about reforms)
- for further education in one’s occupation, or for change of occupation (the latter under some restrictions)
- preferably providing medium level formal vocational certificates or (2nd chance) certificates for access to higher education
- with some limitations of costs determined by the maximum individual amount of refunding (for some time also maximum amounts of costs of eligible programs have been set).

The concrete kinds of training and the occupational distribution is the result of choices of the applicants, and steering of the kinds of training is limited, and, moreover, was not intended beyond the limits of eligibility (see above 3.2.2 and section 4). Applicants are ‘normal’ participants in the adult education institutions, sitting next to participants that do not apply. Providers even do not necessarily know who will apply; in principle they could collect information about this in their feedback mechanisms. Information about

¹ Here the representatives of the Chamber of Labor have pointed to the change at the political level, where the decisions about regulation are taken without communication; the representative of the regional administration did not see so much change in cooperation at the delivery level.

the kinds of training can be obtained from the administrative unit of the regional government that finally takes the decisions about support (see the figures above, and Land OOE 2009-17).¹

3.5 Combination with other support schemes

The *Bildungskonto* has compensatory purposes to the overall education and training provision, through the support of the acquisition of formal certificates. Many programs or courses beyond formal education and training can also be supported by the *Bildungskonto*, e.g., if low qualified persons gather some special qualifications.

Upper Austria provides a larger set of measures to support participation in adult education (see the overview in ANNEX 7.3), the majority being national programs. For all members of the AK (that means all employees) the *Bildungskonto* can be specifically combined with the *AK-Bildungsbonus* (measure 5)² and the *AK Leistungskarte* (measure 6).³ Both of these provide additional support of individual expenses financed by the chamber of labor for specified courses, the *Leistungskarte* entitles for discounts from the expenses at the AK-related providers, the *Bildungsbonus* supports an additional part of expenses, thus these measures can be summed up, and can reduce the individual expenses further (given the maximum amounts of support that limit the refund for expensive measures, lower or medium level training expenses can be reduced substantially). e.g., individual expenses of EURO 330 could be reduced through the overall package by about 90% to 35 EURO: -33 EURO by discount of *Leistungskarte*, -132 EURO through a 40% support by *Bildungskonto*, - 130 EURO by *Bildungsbonus* (AK OOE 2018, Rechenbeispiel).

3.6 Specific features: Temporary support of projects for special purposes and special support for re-entry after maternity leave

Some specific features of the scheme are particularly interesting for the target groups in non-standard employment. Two kinds of specific features were temporarily parts of the scheme: first, a kind of pooled and focused measure for re-entry after maternity leave

¹ Unfortunately the statistical information is not publicly available, and no accessible data bank exists.

² AK-Bildungsbonus: https://ooe.arbeiterkammer.at/beratung/bildung/bildungsfoerderungen/AK_Bildungsbonus.html

³ AK-Leistungskarte: https://ooe.arbeiterkammer.at/beratung/bildung/bildungsfoerderungen/AK_Leistungskarte.html

was delivered that required reduced expenses by the participants (which seemed a particular hardship for this group) with the support money directly paid to the providers, so the participants had only to pay their part of the fees (25%). Second, a certain amount of money designed for a so-called *innovative project fund* (Projektinnovations-Topf) could be won by the providers responding to specific calls to develop measures for specified purposes/target groups that should be later streamlined to the normal program.

3.6.1 Projects for preventive support for re-entry after maternity leave 1999-2009

This specific feature was called *‘Besonderes Bildungskonto’*.¹ It was designed for the support of re-entry after maternity leave, and provided by local group-wise education and training measures for about 10 persons. The preventive character was given by providing the training opportunities during the period of absence, and not waiting until the time of re-entry, and through the mandatory outreach activities. Outreach activities for those groups were established, and the providers applied for support to the regional government, that had to approve the courses, and financed them directly to the provider by 75% of expenses. Thus, the overall support was higher than in the normal measures, and half of the support was paid at the beginning of the measure, the second half after providing the necessary proofs for eligibility.²

The outreach was based on information campaigns throughout Upper Austria, mainly by local personal presentations by members of the chamber of labor and teaching-training personnel of the providers. Such campaigns were conditional for support. Based on the interest of clients, local course supplies were developed, where people could apply. A minimum number of 10 attending participants was also required.³

¹ „Nachdem bei der Inanspruchnahme von Bildungsförderungen Personen in Karenz sowie Wiedereinsteigerinnen bzw. Wiedereinsteiger deutlich unterrepräsentiert waren, wurde 1999 das besondere Bildungskonto eingeführt. Die Richtlinie sieht vor, dass Projekte für spezifische Weiterbildungsmaßnahmen dieser Zielgruppe gesondert gefördert werden. Dabei werden 75 % der Kurskosten vom Land Oö. direkt an das Bildungsinstitut ausbezahlt. Über diese Projektförderung wurden die Anbieter von Weiterbildungsmaßnahmen nicht speziell informiert. Dies führte dazu, dass in der laufenden Förderperiode nur einige wenige Bildungsinstitute Projekte einreichten. Mehr als 90 % der genehmigten Fördermittel entfielen auf Projekte von zwei Bildungsinstituten. (LRH OÖE 2009, p.11)

² The inspection of this part of the scheme was in principle the same as for the other parts: the education providers had to send in the lists of all participants at the beginning (showing the minimal number of 10 participants), when the project was approved. The second half of support is paid after the confirmation and listings of participation are provided. If participants have not fulfilled the 75% participation requirement, the first half has to be repaid (and is calculated against the second half).

³ From this requirement the discrepancy between planned funding and actual funding criticized by the regional court of audit (LRH OÖE 2009) might result, when less than expected participants actually show up in the course.

The procedures of this feature were much more demanding and complicated than the normal procedure, and were therefore criticized by the auditors. Another argument was the decline of demand for this kind of support. It is shown that between 2004 and 2007 the discrepancy between the approved sources for those projects and the really implemented projects rose from 20% to 56% (LRH OOE 2009, p.12)¹

This measure was competing with the new development and implementation of the *Bildungskarenz* (educational leave) that pointed into the opposite direction of the *Bildungskonto*, and allowed temporarily for a de-facto prolongation of maternity leave by about one year (instead of promoting better conditions for re-entry into employment). During the early years 1998-2000 the *Bildungskarenz* scheme could be used for this prolongation (Lassnigg et al. 2011, p.36), then this possibility was excluded by the regulation.

3.6.2 Innovative projects developed by education and training providers

During the 2000s, from 2000² to 2009 and occasionally in 2014, yearly calls for proposals of innovative projects were sent to the regional providers. The topics changed yearly, and the idea was to develop measures for particular purposes and particularly hard to reach groups. Gaps were detected by a project commission formed by the chambers of labor and the employers, the regional administration, the AMS, and the regional school board. This commission developed the topics of the call, and selected among the proposed projects. The topics were selected based on specific problem analyses, e.g. for fields with many precarious jobs (cultural workers), or disadvantaged young people. The idea was that providers should develop innovative approaches, which were piloted, and should be streamlined into the regular program afterwards.

It is not possible to reconstruct these initiatives in the course of this project.³ Examples of the themes could be found, partly in the interviews, partly by the provision of documents:

¹ „Die Nachfrage für die Förderung von berufsorientierten Weiterbildungsmaßnahmen stieg in den letzten Jahren kontinuierlich an. 2004 wurden insgesamt rd. 18.500 Förderanträge gestellt, 2008 stieg die Zahl der Anträge auf rd. 21.200. Dabei standen Steigerungen bei den Anträgen auf Förderung von Einzelmaßnahmen einer sinkenden Nachfrage bei Projektförderungen – insbesondere für Wiedereinsteigerinnen bzw. Wiedereinsteiger sowie Personen in Karenz – gegenüber.“(LRH OOE 2009, p. 5)

² „Mit der ab 2000 von der öö. Landesregierung beschlossenen Förderung von innovativen Projekten wurde eine Empfehlung des Instituts für Berufs- und Erwachsenenbildung aus der Evaluierung 1999 umgesetzt.“ (LRH OOE 2009, p.

³ A reconstruction and thorough analysis would need access to the material around the applications and decision making, which is probably stored somewhere; however, this would be a much bigger project, and access to the material might not be possible.

- In 2007 a call for proposals was addressing the sector of *culture and creativity*, with focus on atypical forms of employment that are particularly common in this sector (‘freie Dienstnehmer’, ‘neue Selbständige’) vis-à-vis the tradition of support for the regularly employed (Land OOE 2007). In 2008 (Land OOE 2008) two topics were addressed
- *Intercultural dialogue*: learning and competences for the multicultural society, and
- development of innovative education and training arrangements for *employees in labor leasing/temporary employment firms*.¹

Further topics were mentioned

- Young people, after completing education, and wanting to change the course of their career (2009)
- Gender Mainstreaming: *understanding* and development of gender democracy (Geschlechterdemokratie) in employment, with young men as a main target group
- Social integration in the fields of education (adult education trainers as target group), housing (e.g., training opportunities for janitors), or health and caring

About EURO 500.000 per year were reserved for this kind of measure, however, only about half of the fund was used. The audit by the regional court has in principle taken a positive stance, however, has also set some critical remarks concerning the demanding implementation and problems in the assessment of the proposals to the calls LRH OOE 2009).²

It is not possible to definitely evaluate this project-oriented approach, because the detailed material is not available. The interview partners made rather summative statements in the direction that the proposals by the providers often were not really

¹ This project could have been to some extent inspiring for the overall policy toward this group, that had started with the law in 1988 (Arbeitskräfteüberlassungsgesetz), and the establishment of collective bargaining, and later the legal establishment of the training fund (2013), however, a closer analysis of the contribution of this 2008 initiative within the Bildungskonto is not possible in this project (the interview persons were not able to provide more information).

² „Die Prüfung von Projekten aus den Jahren 2006, 2007 und 2008 ergab, dass die Kriterien für die Genehmigung bzw. Ablehnung von Projekten für den LRH nicht schlüssig nachvollziehbar waren. Noch im Zuge der Prüfung wurde dies durch eine Dokumentation der Kommissionsentscheidung für 2009 verbessert. Obwohl sich die Kommission bemüht die Schwerpunkte den aktuellen Bedürfnissen anzupassen, zeigte die Prüfung, dass jedes Jahr genehmigte Projekte nicht durchgeführt wurden. Der LRH empfahl die Gründe dafür aufzuarbeiten (z.B. unzureichende Aufschlüsselung der Zielgruppe, inhaltliche Defizite). Diese Erkenntnisse sollten in die zukünftige Projektprüfung einfließen und damit zu einem effizienteren Ressourceneinsatz führen. (LRH OOE 2009, p.13)

innovative (e.g., only re-naming existing programs for the targeted topics or fields), and the required time and effort was quite high.¹

3.7 Reforms over time

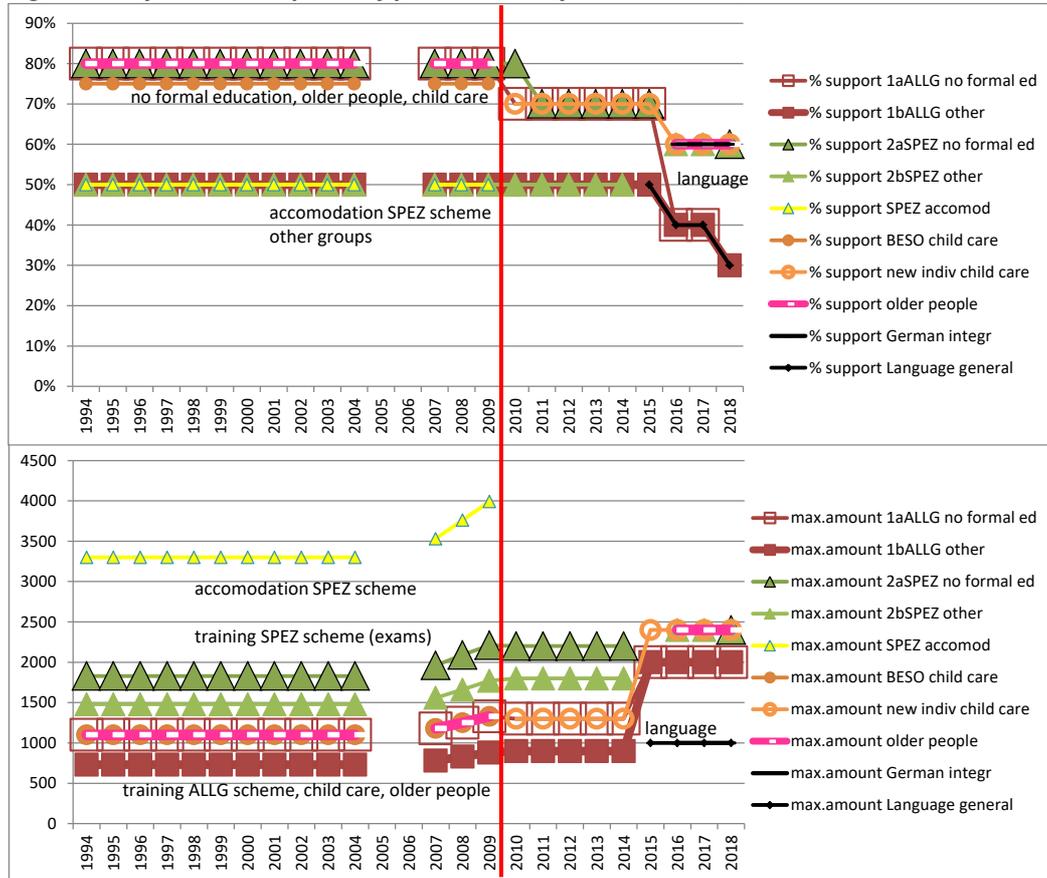
The Bildungskonto has been subject to reforms and several smaller changes over time. The concrete parameters have been changed several times, and some larger reforms have also taken place. The reconstruction was confronted with some difficulties, as most of the documentation is not publicly available, and the interview partners were rather informed and interested into the actual situation than about past developments. In addition, the administrative unit owns the material since the shift of responsibility in 2008, so we have good access to the development since 2009, and this period is also documented by a consistent data base. The OOE government unit has also helped us by reconstructing information for the period 2001-08; for earlier periods some summarizing publications are available (information gaps exist for the mid-2000s).

Reforms concern mainly the specific subsections of the Bildungskonto, the main basic scheme (Allgemeines Bildungskonto) has remained more or less unchanged in its basic features, only the specific parameters of support (percentage of refund, maximum amount) have been varied time and again, and the specifications of target groups also have slightly changed.

In 2010 the formulation of the regulations has also been substantially simplified, from a very complex juridical language to simple bullet points. At the same time a first step of a simplification of the structure has been taken, followed by a next step in 2015. Before that the regulations have become incrementally increasingly differentiated.

¹ One of the authors was involved in such a scheme in the Vienna region some time ago, and the impression was similar.

Figure 2: Stylized description of parameters by sub-schemes, 1994-2017



Evaluations and assessments have criticized the complexity of the measures (see section 4.2). A change in the political constellation of the regional government has brought the reformulation. The change was in the direction of a stepwise reduction of the percentage of support and a stepwise increase of the maximum amounts of support, the number of different parameters has also been reduced stepwise.

Target groups have been extended, first by the stepwise inclusion of higher-level educational groups, and second by the inclusion of non-standard employment among the employees and the self-employed (see Figure 3 top row: one-person enterprises 2010, free lancers, marginally employed, small entrepreneurs 2015).

Figure 2 and Figure 3 show the changes over time. Over the period 1994-2009 a higher support rate on expenses of 80% and 75% was provided for specific target groups (no formal education, older people, persons in child care or returners), the main scheme provided a rate of 50%. In the period 2010-14 the higher rate was reduced to 70%, and the support of accommodation for participants in the scheme of preparation for exams (spezielles Bildungskonto) was terminated (the cost component of this scheme is not available). So, the overall average rate has declined in this period. In the next period

2015-18 the regulation was already changed two times, in the beginning of 2016 and of 2018, so the long term incrementally developed scheme has been substantially destabilized. 2015 or 2016 both rates were further reduced to 60% and 30%, thus the average rate has declined again. 2015 the specific support of older people (45 plus years, then 40 plus years) has also been temporarily discontinued, and then reinstated 2016 with a more selective definition (50 plus years with a monthly gross income below 2.200 EURO per month).

In parallel the maximum rates were stable until 2005 at four different levels, then yearly adjusted to inflation 2007-09, and 2010-15 again stabilized. In 2015 the amounts were again increased and their number reduced to two levels. As a result, the participants can receive lower support rates for more expensive measures. The amount to be paid by participants to reach the maximum amount of support has also been substantially increased: from EURO 730.— in the beginning through EURO 900.— in 2010 to EURO 4.700.— in 2018 at the basic level, or in case of higher rates from EURO 300.— through EURO 600.— to 2.300.—. The average part of the fee paid by applicants on their own (on top of support) was about EURO 900.—.

Figure 3: variation of parameters of support over time: target groups, percentage and maximum amount of support, and sub-schemes

Parameters	1993-2004 ¹	2005-06	2007/2008/2009 ²	2010-14 ³	Reorganization 2015-17 ^{4**}	2018
Eligible groups explicitly mentioned		Info missing				
		Employees Child care, returners Unemployed, welfare Medium level education from 2004 also maturity exam included	Higher ed. 40+years, <1.400 net m.inc	Higher ed <1.500 gross m.inc. + One-person enterprises	Higher ed <2.200 gross m.inc. Free lancers Marginally employed Small entrepreneurs	
1. Allgemeines Bkto					1 Normales Bildungskonto	
1a. No formal education	% support Max.EURO	80% 1.100	80% 1.180/1.250/1.330	70%* 1.300*	**70%/40% 2.000	
1b. Other	% support Max.EURO	50% 730	50% 780/830/880	50% 900	**50%/40% 2.000	30% 2.000
2 Spezielles Bkto (formal exams)					2 Erhöhtes Bildungskonto discontinued	
2a. No formal education	% support Max.EURO	80% 1.830	80% 1.960/2.090/2.210	70%* 2.200		60% 2.400
2b. Other	% support Max.EURO	50% 1480/ / 1100	50% 1560/1660/1770	50%* 1.800	*** /60% 2.400	60% 2.400

Cont. Figure 3

¹ This period includes three regulations 1993-95, 1995-99, 2000-04 (Bauer 2003, see also OEAAB 2007).

² The regulation 2007-09 is the last one that was signed by the responsible SPOE politician, and is formulated in a legal-bureaucratic style with paragraphs and numbered items. It does not include an explicit listing of target groups, the maximum amounts were given by year for inflation adjustment in this regulation, this is indicated by the /separator.

³ The regulation 2010-14 is differently formulated in a new informal style by short bullet points. It includes a formal listing of target groups, summarized in OOE 2009: Förderbar sind Personen mit Arbeitnehmerstatus, Kinderbetreuungsgeldbezieher, Wiedereinsteiger, Arbeitslosengeld- oder Notstandhilfebezieher, Einpersonnenunternehmen (mit maximal zwei geringfügig Beschäftigten oder zwei Lehrlingen – in Summe maximal zwei Personen) sowie Akademiker mit maximal 1.500 Euro Bruttoeinkommen pro Monat (2009-14).

⁴ Förderbar sind Personen mit Arbeitnehmer/innenstatus, freie Dienstnehmer/innen, geringfügig Beschäftigte, Kinderbetreuungsgeldbezieher/innen, Wochengeldbezieherinnen, Wiedereinsteiger/innen, Arbeitslosengeld- oder Notstandhilfebezieher/innen, Einpersonnenunternehmen sowie Kleinunternehmer/innen (mit maximal fünf (VZÄ) Beschäftigten) sowie Akademiker/innen mit maximal 2.200 Euro Bruttoeinkommen pro Monat (OOE 2015-17). Seit 1. März 2016 erhalten Kinderbetreuungsgeldbezieher/innen, Wiedereinsteiger/innen, Personen mit ausnahmsweiser Zulassung zur Lehrabschlussprüfung, Personen ab Vollendung des 50. Lebensjahres (Einkommensgrenze) sowie Personen, die zwecks Integration Deutschkurse besuchen, eine Höherförderung mit 60 % (Land OOE 2016).

	Parameters	1993-2004	2005-06 Info missing	2007/2008/2009	2010-14	Reorganization 2015-17**	2018
Plus in case of spezielles Bkto							
2c. Accommodation costs (until 2009)	% support Max.EURO	50% 3300		50% 3530/3760/3990	discontinued		
Besonderes Bkto (Projects 1999-2009)							
Child care, returners from Childcare	% support Max.EURO	75% 1100		2009 last projects 75% 1180/1250/1330	Integrated into 1 and 2 *70% 1.300-2.200	2 Erhöhtes Bildungskonto **70%/60% 2400	60% 2400
Additional target groups							
Older people	% support Max.EURO	45+ years 80% 1.100 / 1.830****		40+ years 80% 1180/1250/1330	discontinued	50+years, <m.inc 2.200 EURO discontinued/ *** /60% 2.400	60% 2.400
Preparation Fachhochschule FH (max. 2 Semesters)							
Language courses	Per semester,	1100		590/625/665			
German for integration	% support Max.EURO					*** /60% 1.000	60% 1.000
Language generally						**50%/40% 1.000	30% 1.000
Projektinnovationstopf (2000-2009)					flexible, to be decided	discontinued	

* also child care, returners from child care in 2010-14 regulations

** 1.3.2016 adaptation: reduction from 50% and 70% to 40% and 60%; persons without formal education were temporally excluded from higher support in 2016 adaptation, re-established with lower support rate in 2018.

*** from 2016 higher support (Erhöhtes Bildungskonto) was established also for courses for external apprenticeship exam, unconditional of previous qualification, age 50+years conditional on maximum gross income 2.200 EURO per month, and German language courses for integration

**** courses without / with formal exam analogous to allgemeines / spezielles Bildungskonto

Source: diverse sources, Bauer 2003, 2007-09 Regulation; 2015-17 webpages

3.7.1 Early period 1993 till 2002: learning with a new approach

The majority of persons was supported in the *allgemeine Bildungskonto*, the majority of the support money went into the more targeted categories, in terms of amount to the *spezielle Bildungskonto* designed for the acquisition of credentials, in terms of individual support the highest sum was spent for the innovation program (with very few participants) and the returners program (*besonderes Bildungskonto*).

Table 1: Parameters of early period (1993-2002)

	absolute			per cent			support per person EURO
	Persons (T)	Courses (T)	Support (mio EURO)	Persons (T)	Courses (T)	Support	
ALLG	21,0	38,0	6,4	60%	63%	33%	300
SPEZ (exam)	11,0	22,0	8,1	31%	37%	42%	740
BES (return)	2,5		3,7	7%		19%	1.480
INNOV (since 2000)	0,6		1,3	2%		7%	2.170
Total	35,1	60,0	19,5	100%	100%	100%	560

	Applicants	Applications	Courses	Rejected
ALLG+SPEZ absolute (T.) per applicant	33,9	46,2 1,36	60,1 1,77	1,7 0,05

Source: Bauer 2003

3.7.2 Period 2004-09: incremental change

In this period the political constellation has already changed with a government partnership between the OEVP and the Green Party, because of the concentration government the SPOE has held positions. The following structure of Bildungskonto was in place:

- Support of individuals and one-person-enterprises through the *allgemeine* und *spezielle* Bildungskonto, support of projects for returners into employment and in child care through the *besondere* Bildungskonto, and support of projects through the *Innovationstopf*
- Courses providing a formal certificate are supported by the *spezielle* Bildungskonto, with a higher maximum limit of support (Förderobergrenze), housing expenses are additionally possible
- Support is differentiated also by personal characteristics between minimum 50% and maximum 80% of course costs (e.g. higher support for persons over 40 years)

- The decision is flexible, in cases of hardship the regulations can be overruled¹

An evaluation by the regional court of audit (LRH OOE 2009) has proposed some major changes (see below evaluations). A main rationale was that the regulation has become quite complex.²

In 2004 the Social-democratic representatives in the trade unions have claimed on the one hand a set of material improvements partly beyond the previous practices of Bildungskonto (substantial inflation adjustment by 30%, funding of the AK counselling by the regional government as part of Bildungskonto, matching the regional funds by the central government, development of a grant for further education analogous to higher education: Weiterbildungsstipendium), on the other hand a substantial simplification of the administration was claimed by transferring it to the Chamber of Labor as in another Austrian region³ and to testify the entitlement of employees to the Bildungskonto-support by the AK Leistungskarte instead of employers (FSG 2004). The inclusion of marginal employment into the target groups was also a charge.

The employees' representatives from the Christian-democratic party OeVP demanded a matching of means from the central government to the Bildungskonto in 2007 (OEAB 2007).⁴

The main charges were not fulfilled, some inflation adjustment of the parameters was amended 2007-2009 (then again discontinued), and the marginal employees were included not before 2015, other charges concerning the governance were declined.

3.7.3 Period 2010 to 2017: reformed regulation

In this period the original constellation of social partnership and the responsibility of the SPOE for Bildungskonto were terminated. The changes can be interpreted as a search

¹ „Bei Vorliegen besonderer Umstände (z.B. unzumutbare soziale Härte) kann der zuständige politische Referent auch über eine Förderung außerhalb der Kriterien der Richtlinie entscheiden [...] Die Prüfung aller vom politischen Referenten entschiedenen Fälle aus den Jahren 2007 und 2008 durch den LRH zeigte, dass nur mit nachvollziehbarer Begründung von der Richtlinie abgewichen wurde.“ (LRH OOE 2009, p.4)

² „Nach Ansicht des LRH ist die gültige Richtlinie mittlerweile sehr komplex geworden, wodurch die Verständlichkeit für die Bürgerinnen und Bürger leidet. Er empfahl bei der Neugestaltung der Richtlinie 2010 auf eine möglichst einfache Strukturierung und Formulierung zu achten. Damit könnte auch eine gute Grundlage zur weiteren Optimierung des Förderprozesses gelegt werden.“ (LRH OOE 2009, p.4)

³ https://vbg.arbeiterkammer.at/beratung/bildung/bildungsfoerderung/Die_AK-Bildungsfoerderungen.html; see also <https://www.bildungszuschluss.at/>

⁴ OEAB proposal for a Resolution: „Die Vollversammlung der Arbeiterkammer Oberösterreich fordert daher die zuständige Bildungsministerin Dr. Claudia Schmied auf, dass sich der Bund zukünftig finanziell in die Förderung der beruflichen Weiterbildung in Oberösterreich einbringt. Dazu zählt beispielsweise das kostenlose Nachholen von Abschlüssen im zweiten Bildungsweg, oder auch die Verdoppelung der Mittel für das oberösterreichische Bildungskonto.“ (OEAB 2007, p.2).

for new directions. The focus on employees was extended to the self-employed, and then also to very small employers below 5 employees. Non-standard employees were also formally included as target groups.

Before the reform 2010 the AK has also charged some points for reform of the Bildungskonto to the new government (AK OOE Vollversammlung 2009). Main charges were

- the combination of support measures (the AK Support Bildungsbonus was at this time deducted from the Bildungskonto support),
- a yearly adjustment of maximum amounts for inflation,
- no age limits for higher education graduates (but holding the net income limit of 1.400 EURO for this group),
- the maximum amount for formal qualifications relevant to the labor market should be extended to 7.000.—EURO, and
- a compulsory supply of counseling and coaching should be established for these cases, accompanying counseling and coaching by the AK institutions as legal representative of the employees should also be established for the Besonderes Bildungskonto, and funded by the regional government.

Most of these charges were declined by the new government.

4 Evaluation

This section reports about the participation in the scheme, following the structure of the terms of reference. The descriptions are based on the available consistent data-bases. The Bildungskonto is already delivered for a quite long time period, consistent time series exist only to some part of the indicators.¹ First the requested information about the budget, participation, type of training, delivery process, training quality, and outreach to disadvantaged groups is reported (4.1). Second main points from formal evaluations are briefly summarized (4.2).

¹ Only since 2009 a consistent data basis is available about the Bildungskonto and the employment related context variables; from 2001-2008 selected data about the Bildungskonto were reconstructed for us by the responsible unit of the regional administration; and the regional budget is also available on the website only since 2001 (before the former Austrian currency was used). Only partial information about the early period 1994-2000 can be gathered from some secondary sources.

4.1 Actual use of the scheme

Main indicators

The tables and figures in Annex 7.4 give a detailed overview about the resources spent and participation in 2017 for Bildungskonto, broken down by the main available background variables. The following indicators are available in the official reporting system (Table 2 provides a snapshot about the values of these indicators for 2017):

- *Number of applications*, gives grossly information about numbers of participants (few applications are not supported or are reclaimed,¹ more than one application can be supported,² until the maximum amount of support per year and person is reached)
- *Number of applicants*, can be lower than applications, because of multiple applications (the difference is not high, and this information is not available for the whole period, so mostly the number of applications is used)
- *Number of courses used* (in fact course participations), gives information about multiple participation during one year, and this information is also the basis for the estimation of the whole expenditure spent for the courses of participants (indicates the size of the market supported)³
- *Support expenditure*, gives the total expenditure for support in Bildungskonto
- *Course expenditure*, gives the total expenditure of the applicants/participants for the courses used⁴
- *Average support* provided per application, and per course of participation
- *Average percentage* of support
- *Average number of courses* per application

Unfortunately, only univariate information is available, thus deeper analyses of subgroups are not possible.

¹ In the early period (1993-2002) about 4% of applications (5% of applicants) were rejected.

The amount of reclaim is very small, 14 cases during 2 years (2007-08): „In jedem Quartal werden nach dem Zufallsprinzip 250 genehmigte Förderansuchen ausgewählt und geprüft. Dabei wird die Richtigkeit der Angaben der Förderwerberinnen bzw. Förderwerber sowie die Eingabe durch die Bearbeiterinnen kontrolliert. Ein-Personen-Unternehmen werden zusätzlich hinsichtlich der Anzahl ihrer Beschäftigten überprüft. Ergibt die Überprüfung, dass die Förderung zu Unrecht genehmigt wurde, wird der Förderungsbetrag zurückgefordert. Für den LRH waren sämtliche Rückforderungen der Jahre 2007 und 2008 (insgesamt 14 Akten) nachvollziehbar. Sie entstanden im Wesentlichen durch unrichtige bzw. nicht vollständige Angaben seitens der Förderwerberinnen bzw. Förderwerber.“(LRH OOE 2009, p.10)

² In the years 2015-17 cumulated 40.721 persons (Antragsteller; maybe the same persons in different years) posed 47.454 applications (Anträge), a factor of 1,17.

³ Information about the whole market is not available.

⁴ As this figure is estimated from the individual applications, the costs of certain courses might be counted several times, so this indicator includes some elements of turnover.

Table 2: Overview about main indicators (2017)

	Total
Number of Applications	14.558
Number of applicants	12.421
Applications per applicant	1,17
Number of course used	17.570
Course expenditure	19.118.692 EURO
Support expenditure	7.597.391 EURO
Support/ application	522 EURO
Support/ applicant	612 EURO
Support/ course participation	432 EURO
Percentage of support	40%
Courses used/application	1,21
Courses per applicant	1,41

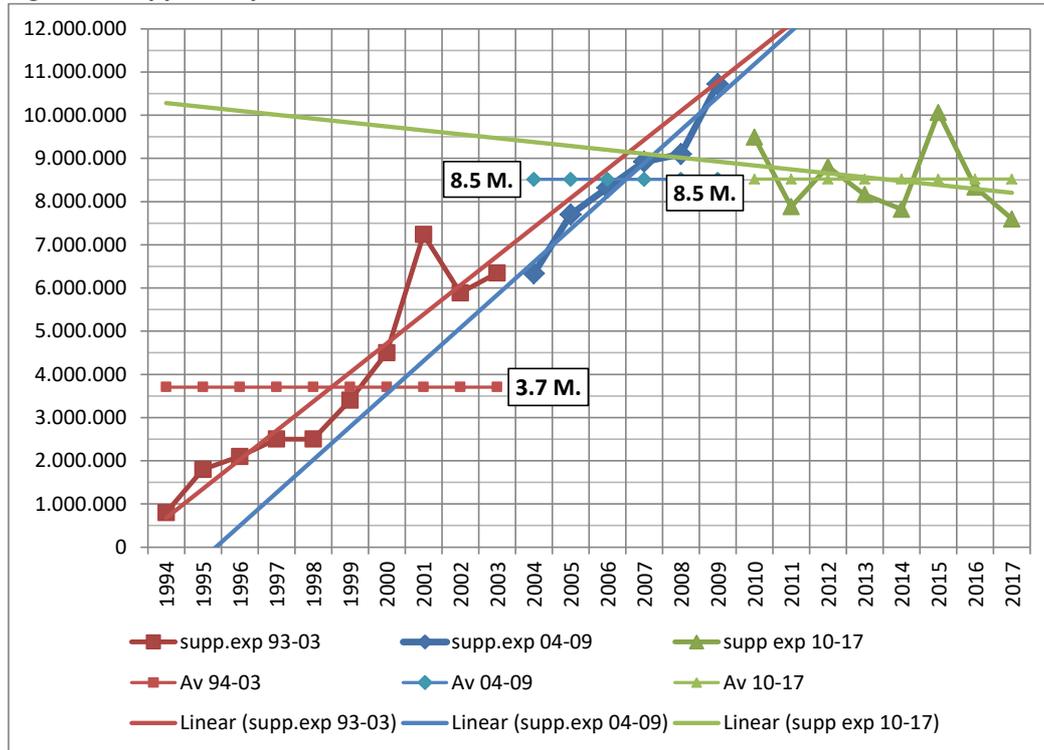
Source: Land OOE 2017, and authors calculations

4.1.1 Public budget of the scheme

In 2017 7.6 million EURO were spent for the support of training through the Bildungskonto (support expenditure) for 12.400 applicants, who learned through 17,600 course participations, and paid 19.1 million EURO for that (on average EURO 1.500.— per applicant). On average 40% of these expenses were refunded through the Bildungskonto (EURO 432.— per course participation, or EURO 612.— per applicant).

Figure 4 shows the development of the support expenditure over the whole period, that indicates a quite steady expansion until 2009, and afterwards a break with a slight reduction and a new stagnating or diminishing development path. The periods indicate different constellations of the regional government, which is based on the numerical distribution of votes (concentration government). However, within this distribution special cooperation agreements (Arbeitsübereinkommen) can be taken. Such a cooperation of OEVP and SPOE lasted until 2003 (in this constellation the Bildungskonto was created), in 2004 a cooperation between OEVP and the Green Party was established that lasted until 2014, with elections in 2009, in which the SPOE lost substantially. After that we see the break in the Bildungskonto, and in 2015 a new constellation emerged, in which the FPOE gained substantially in influence.

Figure 4: Support expenditure 1994-2017

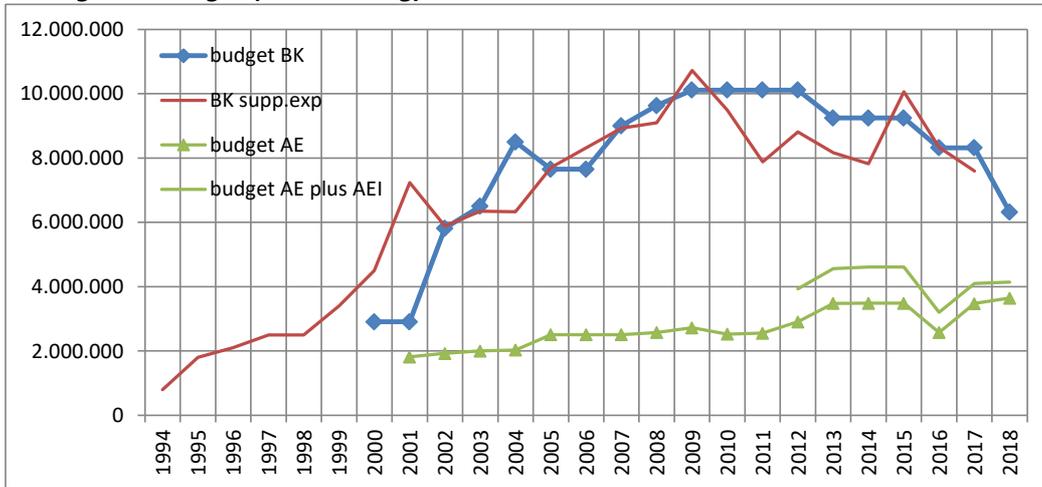


Source: Authors figure based on Bauer 2003, documentation by administrative unit 2001-2008, and Land OOE 2009-17

A comparison of the support expenses to the funds foreseen in the regional budget shows a leveling off 2009-12, and then a stepwise reduction of the foreseen budget until 2018. The expenses have moved below the foreseen funds from 2010 (only with an exception in 2015, when the new government constellation appeared). Since 2012 substantial cuts by ten to more than twenty per cent have occurred, heavily criticized by the employees’ representatives. Since 2014 the region has announced a mid-term-strategy to consolidate the budget; that can be seen as a reason for the reductions.¹ A comparison with the budget for adult education within the education directorate does not show a similar reduction. It also shows the low emphasis that is given for adult education in the public regional budget, as the total sum in this directorate that includes mainly compulsory schooling is 1.6 billion EURO in 2017, so the proportion of adult education is less than 1% (0,2%, if the Bildungskonto is added it is at 0,7%). However, the interview partners have not seen a danger that the scheme would be principally under question; rather it was characterized as a well-established policy.

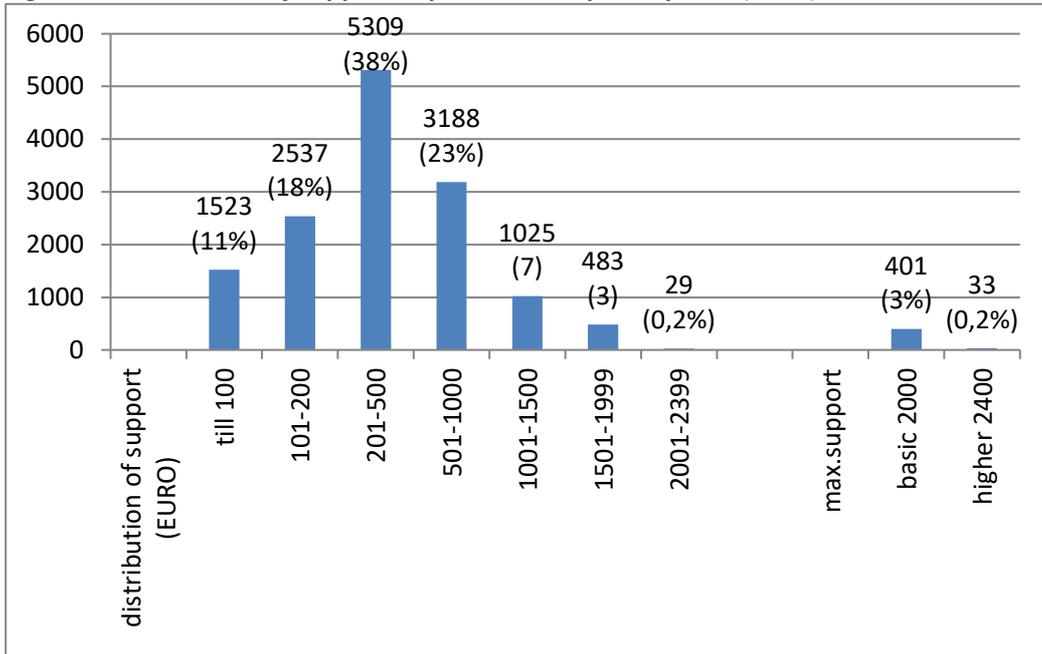
¹ <https://www.nachrichten.at/nachrichten/politik/landespolitik/Budgetplan-In-zehn-Jahren-wieder-ein-schuldenfreies-Land;art383,1434231>
https://www.vida.at/cms/S03/S03_23.4.a/1342566048832/news/gemeinsam-gegen-kuerzungen-im-sozialbereich

Figure 5: Comparison of the Bildungskonto support expenses to the funds foreseen in the regional budget (Voranschlag)



Source: Authors figure based on public budgets 2001-18, documentation by administrative unit 2001-2008, and Land OOE 2009-17

Figure 6: Distribution of support expenditure to participants (2017)



Source: Authors figure based on Land OOE 2017

The support to applicants is concentrated at an amount of 200-500 EURO, almost 90% of participants receive less than half of the maximum amount, and small proportions of participants receive the maximum amount (3% the basic level, and 0,2% the higher level)

Over time some small shifts occurred. From 2013 the lower categories (up to 200 EURO) diminished, and from 2015 the higher categories (1.000 EURO or more) additionally increased, however the development 2015 to 2017 is not consistent (Table 3).

Table 3: Distribution of support expenditure to participants (2010-17)

	2010	2011	2012	2013	2014	2015	2016*	2017
0-100	14%	14%	13%	10%	8%	7%		11%
101-200	22%	20%	21%	18%	19%	18%		18%
201-500	30%	30%	30%	40%	39%	39%		38%
501-1.000	25%	26%	26%	22%	25%	22%		23%
1.001-1.500	6%	7%	7%	7%	7%	9%		7%
1.501-2.000	2%	2%	3%	2%	2%	4%		3%
2.001-2.399	1%	0%	0%	0%	0%	0%		0%
max.lower	3%	2%	4%	4%	4%	4%		3%
max.higher	0,3%	0,6%	0,4%	0,2%	0,5%	0,4%		0,2%

Remark: max.lower, higher indicates the proportion of applications that have tapped the maximum available sum at different levels by one application

* missing information

Source: adapted by author based on LAND OOE 2009-17, *2016 information missing

4.1.2 Participation in the scheme

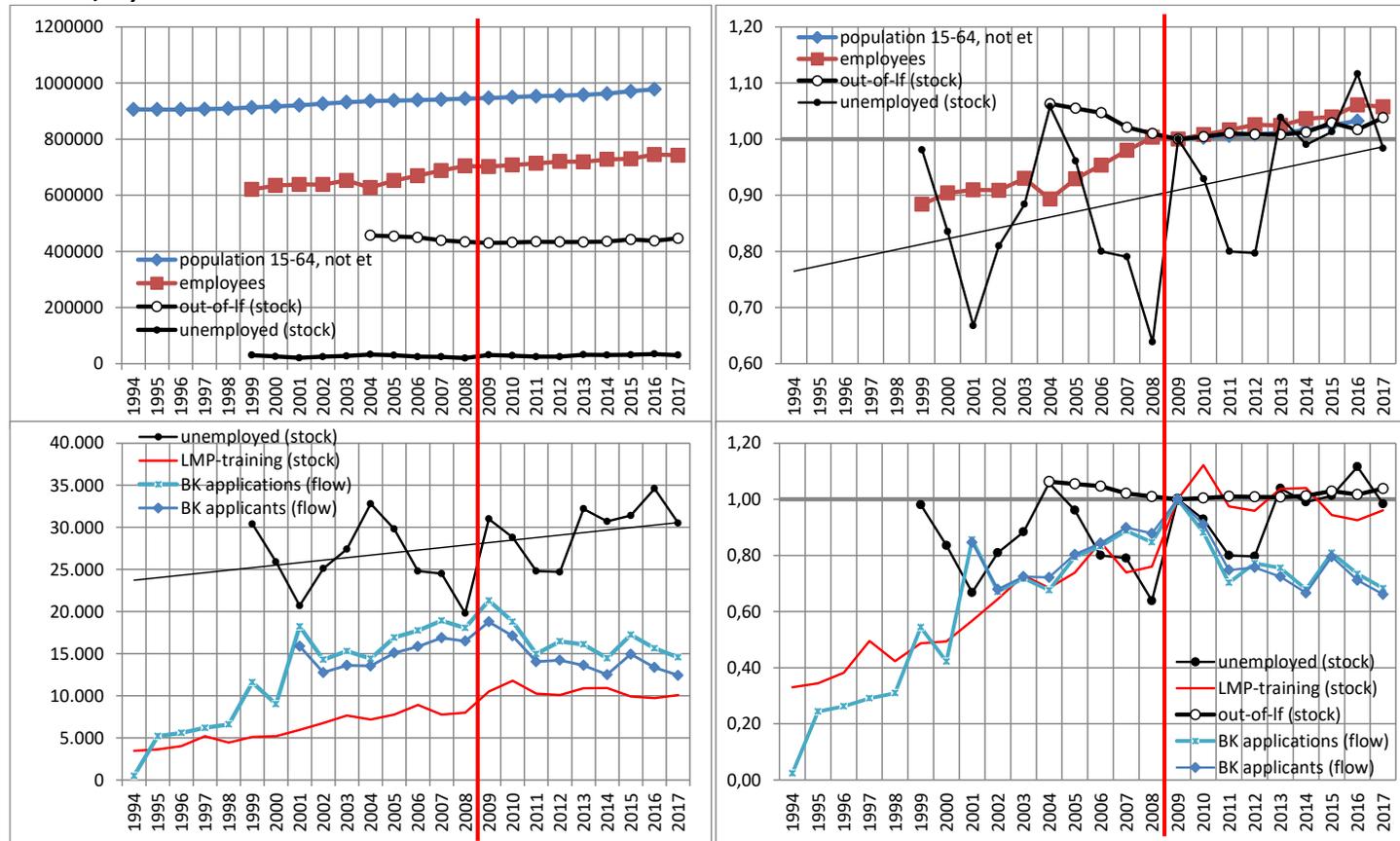
Consistent data about the contextual variables are only available from 1999,¹ the participation in labor market training can be taken as a longer-term reference. Up to 2009 participation in Bildungskonto and labor market training developed at a similar pace. From 2009 population and employment increased, the population out of the labor force decreased and stagnated, and unemployment shows a discontinuous development. Both, participation in Bildungskonto and in labor market training increased till 2009, and then declined (Figure 7). The figure based on indices illustrates the quantitative development of the various groups of participants compared to each other and to some broad categories of employment status and labor market policy in a longer time perspective

The following tables give an overview about the participation in Bildungskonto 2009-17 according to the available breakdowns, and the corresponding figures in the population of Upper Austria. The proportions of participation are shown in Figure 8 and

¹ Longer time series about regional units are scarce, in Austria we find series from the Labor Force Survey (LFS) beginning from 2004 (<http://statcube.at/statistik.at/ext/statcube/jsf/tableView/tableView.xhtml>), and the new employment statistics begin only from 2009 (<http://statcube.at/statistik.at/ext/statcube/jsf/tableView/tableView.xhtml>), EUROSTAT provides statistics about adult education starting from 2000 (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=trng_lfse_04&lang=en), however, the statistics about the labor market only include relative figures (<https://ec.europa.eu/eurostat/data/database>, regional statistics), the regional OECD statistics (https://stats.oecd.org/Index.aspx?DataSetCode=REGION_DEMOGR) start from 1990 (population), and 1999 (employees, unemployed), see for differences between databases ANNEX 7.5)

Table 6. The relative participation in the Upper Austrian population has declined between 2009 and 2011 from above 2% to around 1.5%, and has stagnated since then. The participation of women is consistently 0,5 percentage points higher than that of men, and the participation ratio follows the general development for both sexes. According to prior *educational attainment*, the overall decline in participation has hit most of the educational categories, only the (restricted) tertiary qualified show a continuous rise at a low level of participation (0,3% to 0,7%). The holders of an apprenticeship certificate participate above average (2,2% to 3,3%), and those of a maturity exam do also (2,2% to 2,8%); the former are on a decline 2009-11 and then stagnating, whereas the higher qualified are rather stable with ups and down, and have slightly overrun the apprenticeship certificate holders since 2012. However, the strong objections of a big shift towards the higher qualified if the measure is opened up for them has not occurred. The (smaller group) of medium level schools participate at an average level, and the formally unqualified participate below average over the whole period (0,6% to 1,1%). According to the employment status the participation of the labor force categories is above average, and the non-employed participate markedly below average (0,2% to 0,5%). The participation of the employees as the largest group follows the average, the unemployed show ups and downs, and the self-employed are on the rise, in particular since 2015 (in 2016 the participation of the employees is at 2% and of the self-employed at 3,5%, the unemployed are in between).

Figure 7: Participation in the Bildungskonto, compared to employment, unemployment and out-of-labor-force (absolute, and index, 2009=1,00)



Source: Authors figure based on OECD regional statistics (population, employees), LFS (out-of-labor-force), AMS (LMP training), documentation by administrative unit 2001-2008, and Land OOE 2009-17 (Bildungskonto)

Table 4: Contextual figures for Upper Austria (population, educational attainment, employment status) 2009-2015

Population 15-64	2009	2010	2011	2012	2013	2014	2015	2016
m	479.661	481.554	482.257	483.756	485.500	488.564	494.671	498.353
f	468.853	471.059	471.812	472.457	473.460	475.395	478.292	480.881
total	948.514	952.613	954.069	956.213	958.960	963.959	972.963	979.234
Population 15-64, not in education/training								
m	421.901	424.017	426.222	427.762	430.077	434.257	440.191	444.527
f	413.057	414.923	416.697	416.933	417.179	421.400	422.877	426.664
total	834.958	838.940	842.919	844.695	847.256	855.657	863.068	871.191
Education attainment (2012-13 break ISCED)								
ISCED 0-2	250.497	249.250	245.924	242.838	239.693	236.296	232.249	232.962
ISCED 3-4	524.831	526.378	568.100	569.481	494.958	497.525	504.725	505.070
ISCED 5-8	173.186	176.985	140.045	143.894	224.309	230.138	235.989	241.202
Education attainment, Austrian classification								
Compulsory	250.497	249.250	245.926	242.929	241.581	239.519	235.374	236.272
Appr.cert.	347.179	348.123	348.207	348.700	347.489	347.421	353.932	353.061
VET medium	136.082	136.247	136.468	136.657	137.959	139.521	139.132	139.621
Academic	41.570	42.008	42.088	41.745	41.777	41.677	43.651	44.440
VET higher	78.721	79.504	80.353	81.403	81.185	82.981	84.035	85.345
Non tertiary	4.279	4.225	3.898	3.886	3.893	3.957	3.924	4.042
Tertiary	90.186	93.256	97.129	100.893	105.076	108.883	112.915	116.453
Occupational status (break 2010-11 concerning selfemployed and employers)								
workers, blue c.	248.392	248.051	249.568	259.071	258.681	259.135	261.260	263.243
workers, white c.	282.634	288.831	296.061	323.404	327.749	332.793	340.656	348.046
other employees	80.758	83.025	81.722	48.038	46.529	45.070	42.258	41.838
employers	24.208	23.421	17.840	18.017	17.909	17.449	17.226	17.224
selfemployed	40.906	41.600	46.920	46.358	50.218	50.826	51.482	51.562
family workers	8.785	8.151	4.407	4.312	7.721	7.555	7.594	7.226
unemployed	33.028	29.048	28.473	31.032	35.120	38.060	39.720	39.606
out of lf	229.803	230.486	229.078	225.981	215.033	213.071	212.767	210.489

Source: Own table, based on download from Statistics Austria, employment statistics (Abgestimmte Erwerbsstatistik); data available only until 2016.

Table 5: Participation in Bildungskonto 2009-2017 (absolute)

Applications	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total	21.315	18.791	14.975	16.461	16.101	14.469	17.260	15.648	14.558
Gender									
M	9.815	8.933	6.781	7.371	7.358	6.522	7.926	7.067	6.314
F	11.500	9.858	8.194	9.090	8.743	7.947	9.324	8.579	8.244
Education attainment									
Compulsory	2.660	2.234	1.740	1.554	2.746	1.893	2.551	1.674	1.630
Appr.cert.	11.573	10.448	8.217	9.000	7.863	7.472	8.403	7.840	7.031
VET medium	3.387	2.648	2.052	2.204	2.023	1.858	2.133	2.060	1.941
Maturity ACAD+VET	3.414	3.095	2.539	3.163	2.895	2.658	3.278	3.118	3.010
in pedagogy educ*		74	95	111	106	81	107	82	74
Tertiary	281	292	332	429	468	507	788	874	872
Employment status									2.017
Unemployed, welfare	928	965	757	547	736	913	1.094	992	1.087
Educational leave	72	130	150	190	168	171	262	349	420
Maternity leave	659	866	934	897	1.018	729	577	486	487
Returners**	101	72	61	37	17	18	18	12	7
Employees	18.793	15.923	12.353	13.957	13.361	11.855	14.174	12.603	11.534
Self-empl, entrepr.***	762	835	720	833	801	783	1.135	1.206	1.023
-one-person enterpr.	762	793	676	800	790	729	1.030	1.059	903
-other self-employed		42	44	33	11	54	77	71	58
-small employers							28	76	62

Remarks: *a small temporary intervention supported teacher students, are holders of maturity exam; **returners from career interruption because of child care responsibilities, e.g. after maternity leave; ***sum of different categories of self-employed persons: one-person enterprises were included as a specific target group, and later the measure was also opened up for small entrepreneurs; other categories of self-employed (professional service providers) were eligible earlier.

Source: Authors table based on Land OOE 2009-17.

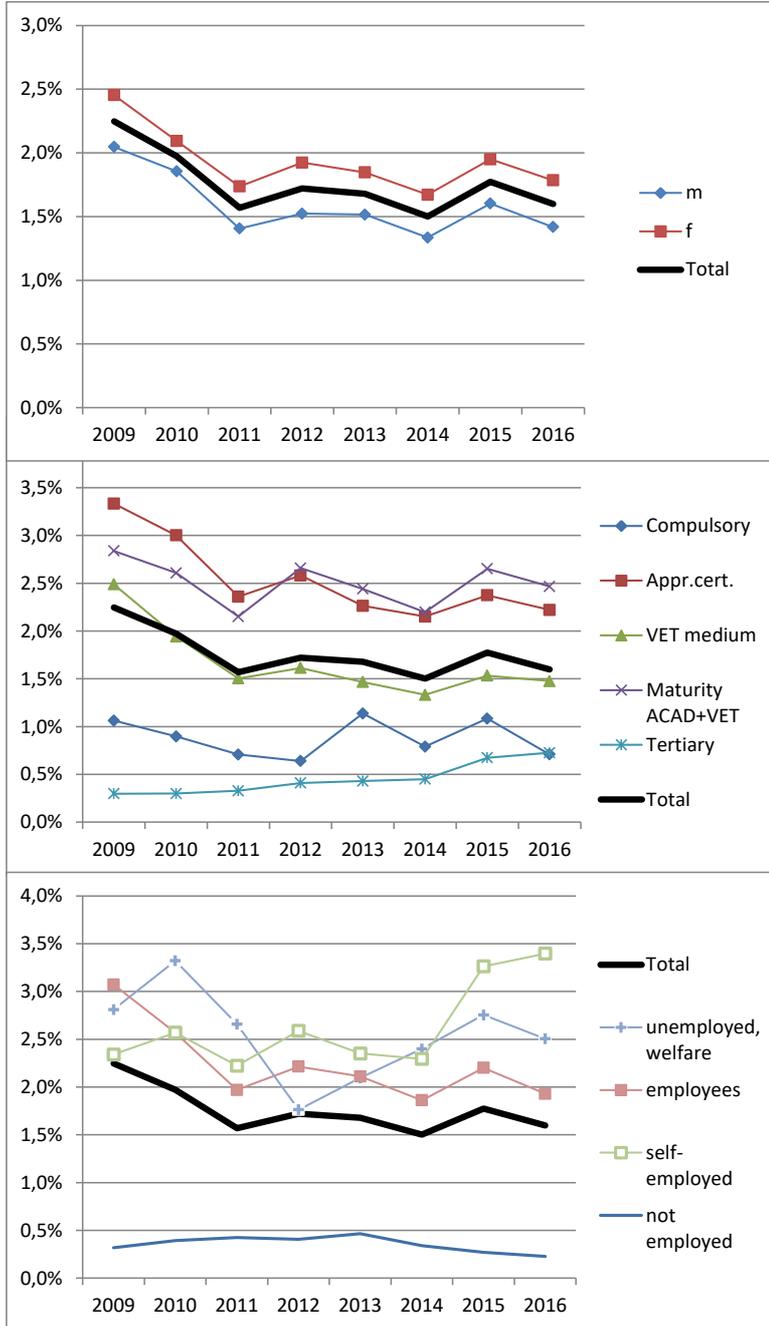
Table 6: Participation in Bildungskonto 2009-2017 (relative, %)

%Applications...	2009	2010	2011	2012	2013	2014	2015	2016
...by 15-64 population	2,2%	2,0%	1,6%	1,7%	1,7%	1,5%	1,8%	1,6%
...by gender								
M	2,0%	1,9%	1,4%	1,5%	1,5%	1,3%	1,6%	1,4%
F	2,5%	2,1%	1,7%	1,9%	1,8%	1,7%	1,9%	1,8%
...by education attainment, Austrian classification								
Compulsory	1,1%	0,9%	0,7%	0,6%	1,1%	0,8%	1,1%	0,7%
Appr.cert.	3,3%	3,0%	2,4%	2,6%	2,3%	2,2%	2,4%	2,2%
VET medium	2,5%	1,9%	1,5%	1,6%	1,5%	1,3%	1,5%	1,5%
Maturity ACAD+VET	2,8%	2,6%	2,2%	2,7%	2,4%	2,2%	2,7%	2,5%
Tertiary	0,3%	0,3%	0,3%	0,4%	0,4%	0,4%	0,7%	0,7%
...by occupational status (break 2010-11 concerning selfemployed and employers)								
unemployed, welfare	2,8%	3,3%	2,7%	1,8%	2,1%	2,4%	2,8%	2,5%
employees	3,1%	2,6%	2,0%	2,2%	2,1%	1,9%	2,2%	1,9%
self-employed	2,3%	2,6%	2,2%	2,6%	2,4%	2,3%	3,3%	3,4%
not employed*	0,3%	0,4%	0,4%	0,4%	0,5%	0,3%	0,3%	0,2%

Remark: not all categories of participation can be related to respective populations; * not employed include family workers and out-of-labor-force in the population, and maternity leave and returners among applications.

Source: Authors table based on Land OOE 2009-17 and Statistics Austria, employment statistics.

Figure 8: Participation in Bildungskonto 2009-2017 (relative, %)



Source: Authors figure based on Land OOE 2009-17 and Statistics Austria, employment statistics.

Table 7 shows main characteristics of participants: employment status and educational background in 2017. The program supports mainly employed people, with medium level educational status; about half hold credentials from apprenticeship, and a further third from medium and upper level vocational schools). Lower qualified (up to 10%) and persons with tertiary education (less than 10%) are less frequently represented. Non-standard forms of employment are documented only partly in the statistics. An identifiable category of non-standard employment is one-person enterprises (about 7%). The categories of self-employed refer to the regulatory structure, *one-person enterprises* are those with membership to the economic chamber, *small enterprises* are those with membership in the economic chamber with maximum five FTE employees, and *self-employed* are those who are not employees and not member of the economic chamber (mainly persons who are providing services at lower qualification levels individually, e.g. in health or various consultancy occupations).

Table 7: Bildungskonto participants by employment status and educational background (% distribution), 2017

	Applications 100%	Support expenditure 100%	Support per application (EURO)	
Total	14.558	7.597.391 EURO	522	1,00
Distribution by...				Index total=1,00
Employment status				
Employed	79,2%	75,6%	498	0,95
Unempl, welfare	7,5%	6,8%	476	0,91
Child care, return	3,4%	4,7%	726	1,39
Ed leave	2,9%	5,3%	961	1,84
NON-STANDARD EMPL.sum	7,0%	7,6%	563	1,08
One-person-entpr	6,2%	6,6%	558	1,07
Self-employed	0,4%	0,5%	591	1,13
Small enterpr	0,4%	0,5%	598	1,15
Education background				
	Applications	Support exp		
Low skill	11,2%	7,2%	334	0,64
Apprenticeship	48,3%	51,1%	552	1,06
Medium VET	13,3%	13,1%	513	0,98
Advanced ED/VET	20,7%	20,5%	517	0,99
Pedagogy	0,5%	0,5%	530	1,02
HigherEd	6,0%	7,6%	665	1,27
Sex				
Female	56,6%	55,0%	507	0,97

Remark: Categories according to the definitions of target groups; self-employed are mainly persons in professional or service occupations who provide their services individually (e.g., Freiberuflich); small entrepreneurs employ maximum 5 FTE employees

Source: Land OOE 2017

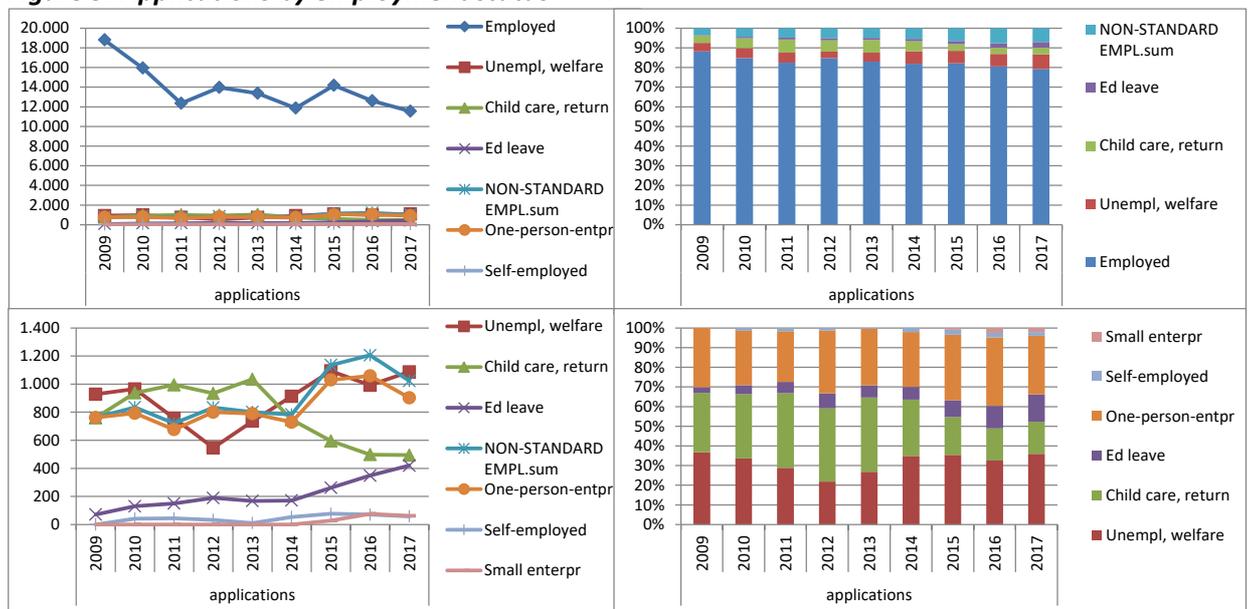
The low skilled, as well as persons with child care responsibilities (mainly women, about 7%), and the very few self-employed (about 1%) receive higher rates of financial support (Table 7). Participants in the educational leave program (about 3%) who receive support for subsistence to be able to participate in longer educational programs receive the highest average support, as can be expected.

The regional distribution by sub-regions is very near to the regional population distribution (shown in ANNEX).

During the period since 2009 the employed remained by far the biggest category, their proportion declined somewhat (90% to 80%), and among the smaller categories participations related to child care also declined since 2013 (reduction by half between 2013 and 2017, after an increase), the unemployed have stagnated over the whole period, with some ups and downs. The small categories of educational leave and non-standard employment, mainly one-person-enterprises, have increased at the different indicators, mainly since 2014. The changes are more marked with applicants than with expenditure (Figure 9, see also ANNEX).

With educational background the medium level holders of an apprenticeship certificate are the biggest group, showing some decline (55% to 50%), and the still small group of tertiary educated has increased. The target group of low skilled has stagnated at 10% (Figure 10).

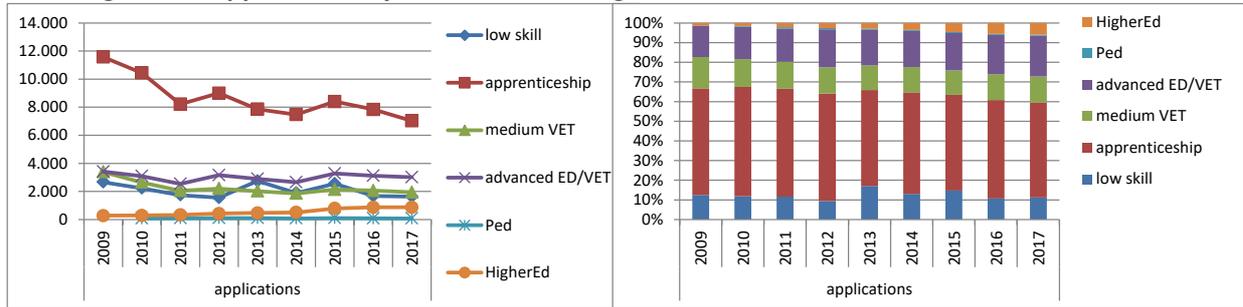
Figure 9: Applications by employment status



Remark: upper panel all categories, lower panel small categories only, see also the figures in ANNEX 7.4.3

Source: Authors figure based on Land OOE 2009-17

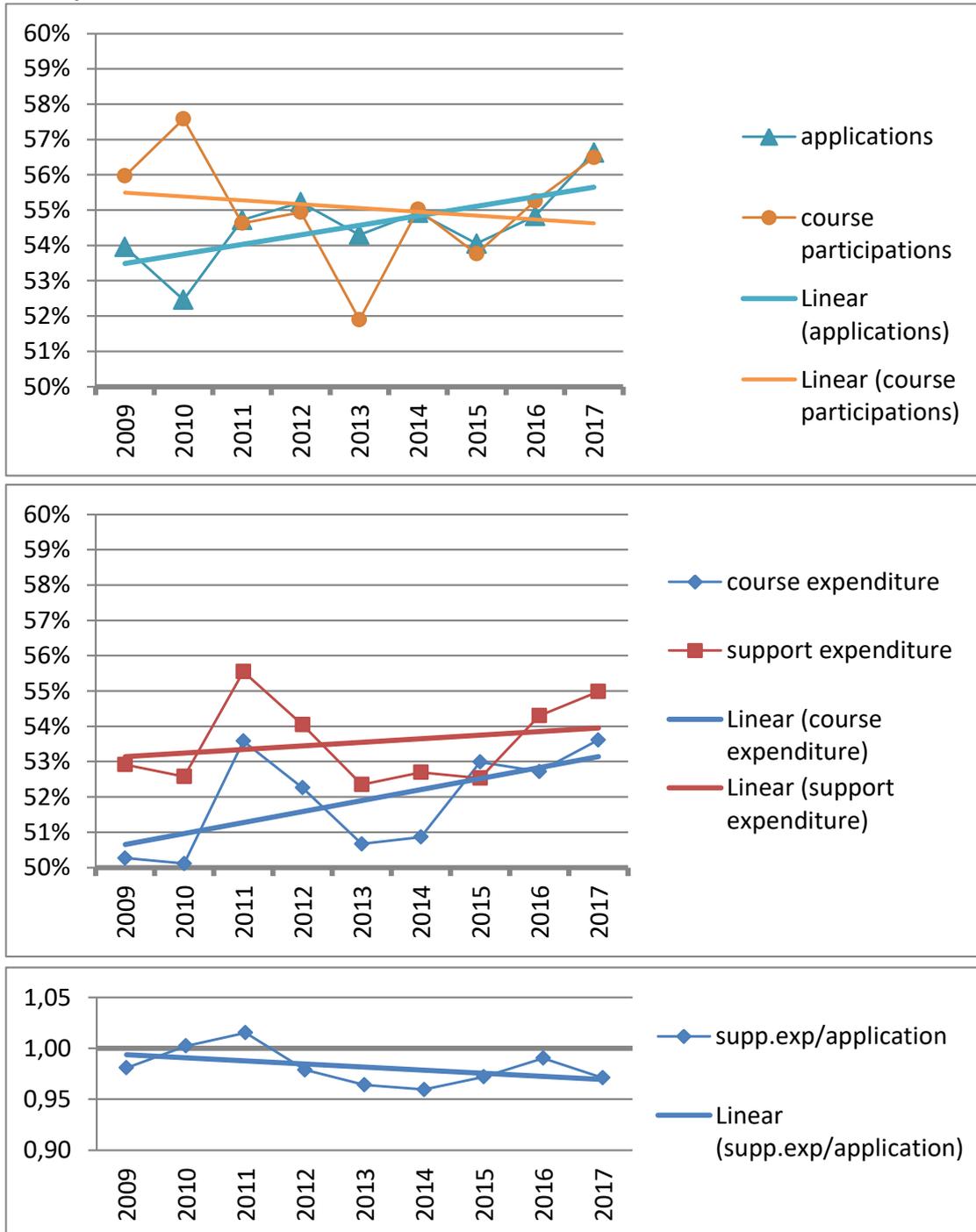
Figure 10: Applications by educational background



Source: Authors figure based on Land OOE 2009-17

Figure 11 gives deeper information about female participation, in addition to the higher participation rate shown above. Overall the yearly figures show much fluctuation, with the indicators being not clearly related to each other; the trendlines indicate some tendencies. First, female participation and funding is over 50%, with a trend of slight increases over time in applications, however, stagnating course participation, with ups and downs in the period. Second, funding variables show a slightly lower female proportion than participation variables, and the share in overall course expenditure of women rises quicker than their share in support expenditure, which has remained still above their share of course expenditure. Third, consequently the support per application is lower than for men (below 1,00) and declining in tendency. In sum, a higher and slightly rising proportion of female engagement is under some constraint with access and funding: course participation stagnates while applications are rising, the share in course expenditure rises quicker than the share in support expenditure, and the support per application is slightly below men and declining.

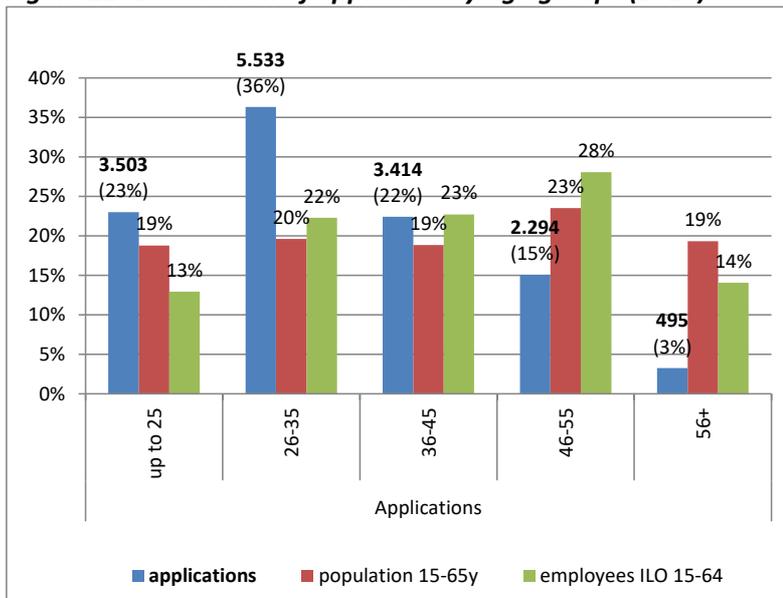
Figure 11: Female applications, course participations, support expenditure, course expenditure (%female), and support expenditure per application (index female, total =1,00)



Source: Authors figure based on Land OOE 2009-17

Applicants by age groups concentrate in 2017 at the medium-young group of 26-35 years (36%), almost double of their proportion in the population or the employees; the target group of elderly 46+ years are represented by 18% (less than half of their representation in the population or among employees).

Figure 12: Distribution of applicants by age groups (2017)

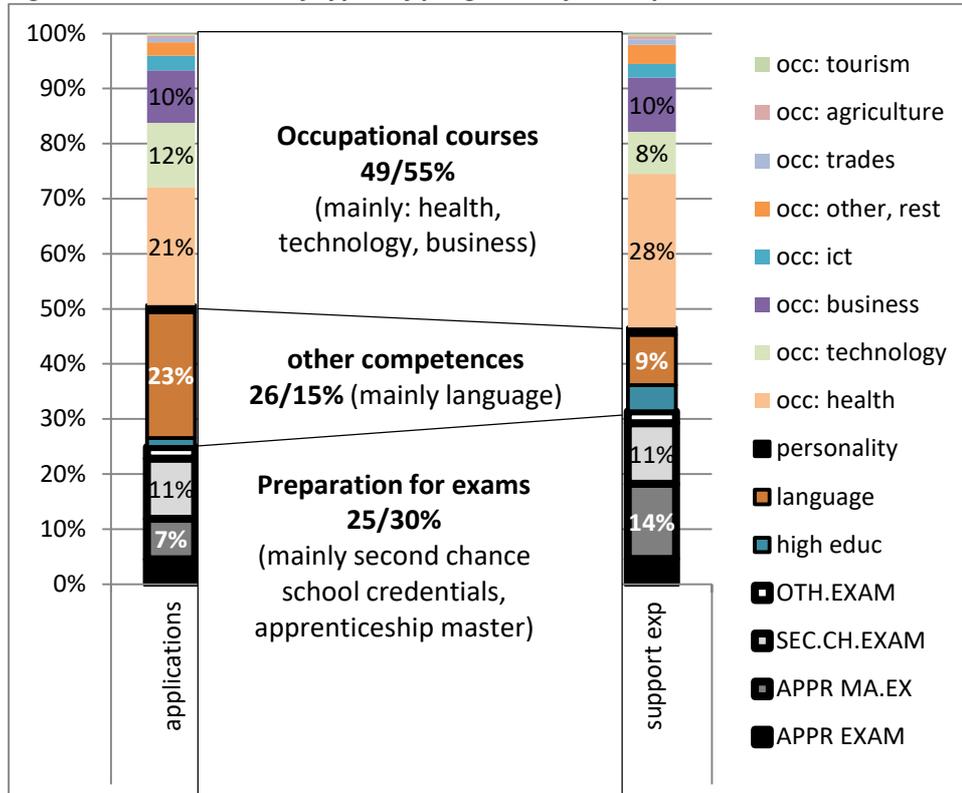


Source: Authors figure based on Land OOE 2017, employment statistics (Abgestimmte Erwerbsstatistik) and LFS

4.1.3 Type of training

The type of training supported by Bildungskonto is basically determined through some of the eligibility criteria (courses provided by accredited institutions, vocational oriented content). In addition, some further criteria are guiding the selection of training, e.g., the higher support of low educated and of courses that provide a formal credential. The focus on (women) returners from child care responsibilities into employment also guides the selection of courses to some extent.

Figure 13: Distribution of types of programs by basic parameters



Source: Authors figure based on Land OOE 2017; programs typed by three basic categories, first preparation for formal exams (EXAM, or EX: APPR=completion of apprenticeship, MA=Meister or similar that build on apprenticeship, SEC.CH=second chance for compulsory certificate or Maturity for higher education; OTH=other); second other more general programs (higher education courses, language proficiency, personality development); third specialized occupational courses by field (occ).

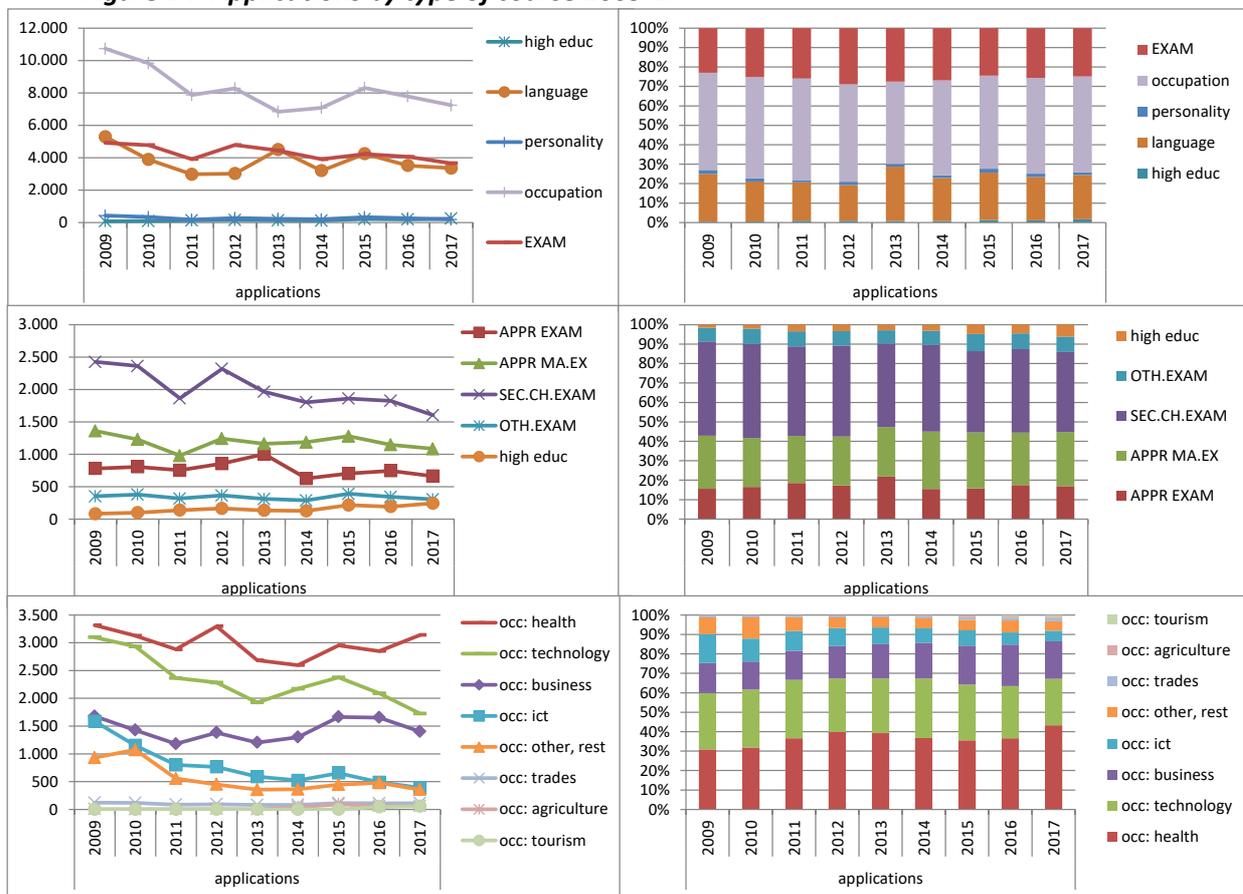
A detailed occupational classification of participants is available from the data base (see ANNEX 7.4 tables and figures). This information was grouped by summary categories for 2017 (Figure 13):

- About half of the program supports medium level non-formal courses for improvement of *occupational competences* (mainly health, technology, business, other occupations represent only very small proportions).
- About one third supports *preparation for different kinds of formal exams*: completion of apprenticeship, further steps after apprenticeship (apprenticeship master), and second chance education for school credentials (mainly Maturity qualifying for access to higher education). The second chance school credentials (11%) and the exams of master apprentices building on apprenticeship credentials (also around 10%) are accessed more frequently than

the ordinary first cycle apprenticeship exam as a first qualification for formally unqualified persons (5%).

- *Other competences* are acquired by around one fifth of the program (one fourth of applications, and 15% of support expenditure), in this category mainly language competences are supported, the other categories (personality development and higher education competences) are much less frequently represented (participation in higher education courses is related to relative higher support funds).

Figure 14: Applications by type of course 2009-17



Remark: The figures are based on different summaries of categories. The upper panel shows the main categories over the whole distribution, the medium panel shows the different categories of courses leading to formal exams and includes also the small proportion of higher education programs (exams plus h.e.=100%), and the lower panel shows the detailed occupational categories (occupations=100%).

Source: Authors figure based on Land OOE 2009-17

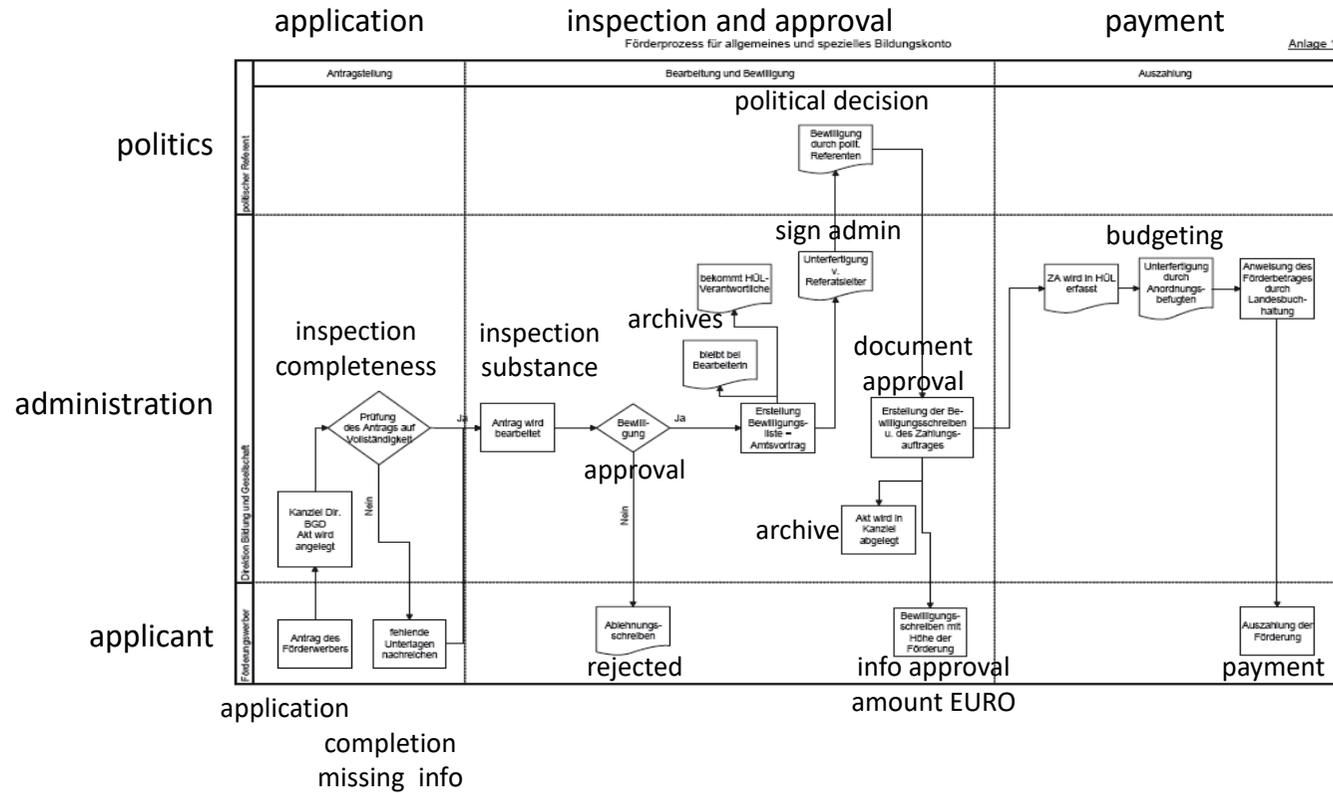
Over time the distribution of the main categories is quite stable. The proportion of courses leading to formal exams oscillates between 20% and 25%. Within this group

most categories also remain stable, some reduction of second chance formal schooling programs, and some increase of higher education courses can be seen. The proportion of medium level occupations also remains quite stable. Within this group the three main categories gain some weight, and health occupations rise slightly at the expense of technology. The smaller groups of (more basic) ICT-courses and the collected rest category lose weight; tourism is always a very small category.

4.1.4 Process

With the principle of application after completion of the course attended, the main process lies at the side of the administration: the applicants have to show up the necessary proofs, some discretion is at the side of the administration within the rules, and with some possible exceptions (evaluations show here room for, e.g., being more restrictive or supportive with incomplete or otherwise mistaken applications, and support with correcting mistakes). The applications, including the confirmation of payment and attendance about participation are inspected, and if positively evaluated, not many mistakes can occur. Only, if applicants cheated with their information the money is reclaimed, which occurs very seldom. From 2010 an electronic application system has been established, that allows for a direct inspection of the material; however, the traditional form has also been continued in parallel (LRH OOE 2010).

Figure 15: Stylized process of approval of applications and payment



Source: LRH OOE 2009, annex, modified/translated by authors

Remark: 2011 the administration was reformed towards electronic acts, and the approval was postponed to the end of the process, see document approval (OOE 2015, p.4).

From the side of applicants, they have to fill in and send in the application. Two channels are possible, by paper or electronically. In the interview with the representative of the administrative unit these two channels were deliberately defended, in order to avoid barriers.

Applicants need information about the scheme. Three to four basic channels of information have been identified: general advertisement, guidance and counselling institutions and practices, education providers, and informal exchange of experiences. This structure can be a barrier for people who do not think about education and training beforehand, and can privilege people who attend education and training anyway. This might also be a source of deadweight, if people attend further education, and receive the information that they can apply for the support. In the early period the potential gaps of information were to some extent bridged by the close cooperation between the Chamber of Labor, the education and training institutions and the administration, by using the guidance and counselling processes for providing information about the support. In the later period wider knowledge about the measure is expected by the stakeholders. In any case, the scheme was mainly developed for people at the medium education level, who are interested in further education, but suffer from financial barriers (as an analogy to the existing support at school and higher education level, that mostly provide free access, and also some material support, mainly grants).

The different categories of support and sub-programs, and the changes over time, are somewhat difficult to capture. They might be a challenge for the administration in their inspection, as well as for the applicants, if not advised accordingly. Thus, charges for simplification have been frequently brought forward since early times by evaluators. On the other side, the differentiated conditions might set incentives for certain target groups that suffer barriers in their access to further education; however, the effectiveness of the concrete regulations cannot be proved without a more thorough evaluation. In any case, the adaptations of last years have accordingly simplified the scheme.

In case of clearly identifiable disadvantaged groups, as migrants with German language problems or asylum seekers, some of the education providers have explained how these target groups are guided and supported towards the application. Applications are made by the training institution, and the support is paid to the institution afterwards, so the applicants have only to pay their individual part of the training costs (which might be difficult enough for them).

Some categories of non-standard workers have been included in the regulation, and have also increased participation; however, they have remained rather at the margin of the scheme in terms of participation.

4.1.5 Training quality

When the scheme was introduced in the early 1990s established quality procedures did only partly exist. The big providers were ISO certified, and participant surveys were used occasionally. In the course of the implementation of the Bildungskonto the quality issue gained prominence in general in Austrian adult education policy, and quality frameworks were established at the regional level. The regulation of Bildungskonto made this a condition for support, and so indirectly also contributed to the spread of the quality framework.

Training quality is now covered by the condition that only participation with accredited providers is considered for support.¹ The accreditation frameworks (Qualitätssiegel OOE Erwachsenenbildung)² and procedures are in the meantime well established in the region with above 400 accredited providers, and accepted by the various stakeholders, as indicated in the interviews.

The formally established quality framework (Qualitätsgütesiegel) exists since 1998 at the regional level and a new national framework (Ö-Cert) has been established more recently. The institutions have to undergo a detailed periodical auditing procedure at the different levels of their functioning. The market is highly concentrated, there are indications that above 85% of the courses supported by Bildungskonto are provided by the two biggest providers (LRH OOE 2010, p.4).³

4.1.6 Reaching out to disadvantaged groups

General compensatory aims for medium and low educated employees

The Upper Austrian Bildungskonto at its introduction aimed at additional support of further education for medium and lower level educated employees, as a compensatory support scheme for these groups, in addition to the existing grants and supports for students and the upper level school educated employees, the main target group were completers of apprenticeship. During the 1990s this aim was more or less undisputed.

¹ See summarizing information about quality requirements IBE 2019

² <http://www.ibe.co.at/ebqs.html>; see also the regional government statement <https://www.land-oberoesterreich.gv.at/171165.htm> , and the stakeholder organization of regional adult education providers: EB Forum OOE <https://www.weiterbilden.at/eb-forum-ooe/>; see reference to the quality framework <https://www.weiterbilden.at/bildungsanbieter/>

³ Wirtschaftsförderungsinstitut WIFI OOE <https://www.wifi-ooe.at/wir-uber-uns> Im Kursjahr 2017/2018 wurden 9.868 Kurse, Seminare und Lehrgänge durchgeführt, die von 95.048 Kunden besucht wurden und insgesamt 4.929.165 Teilnahmestunden umfassten. Berufsförderungsinstitut bfi OOE <https://www.weiterbilden.at/bildungsanbieter/bbrz-gruppe/> 2015: Ca. 4.000 Kurse mit rund 50.000 Teilnehmer/innen an 22 Standorten,

The main part of the scheme (allgemeines und spezielles Bildungskonto) was only eligible for the low or medium level educated; only the sub-schemes for specific groups (besonderes Bildungskonto, for child care and returners) were open for all education levels. This strategy can be seen as an attempt of outreach to these groups. However, as evaluations showed, not much was done specifically for outreach. Participants had to find their access more or less on their own, and there were quite severe lacks of information (see section 4.2 about evaluations)

At the end of the 1990s questions arose first about the support of the upper level secondary educated (advanced level academic schools, and advanced level VET schools, providing Maturity exam and higher education access), and later about higher education graduates with employment problems. Blumberger et al. (1999, p.84) discussed this problem.¹ They recommended not opening up the scheme generally, to hold up the compensatory role, but to allow ‘exceptions’ for certain purposes (e.g., preparation for apprenticeship exam). Bauer and Hofer (1999, p.161) also discuss this question. They see a danger for the compensatory role, and plea for different rates of support, and demand a substantial increase of the overall size of the fund because of the higher propensity of access by these more educated groups.

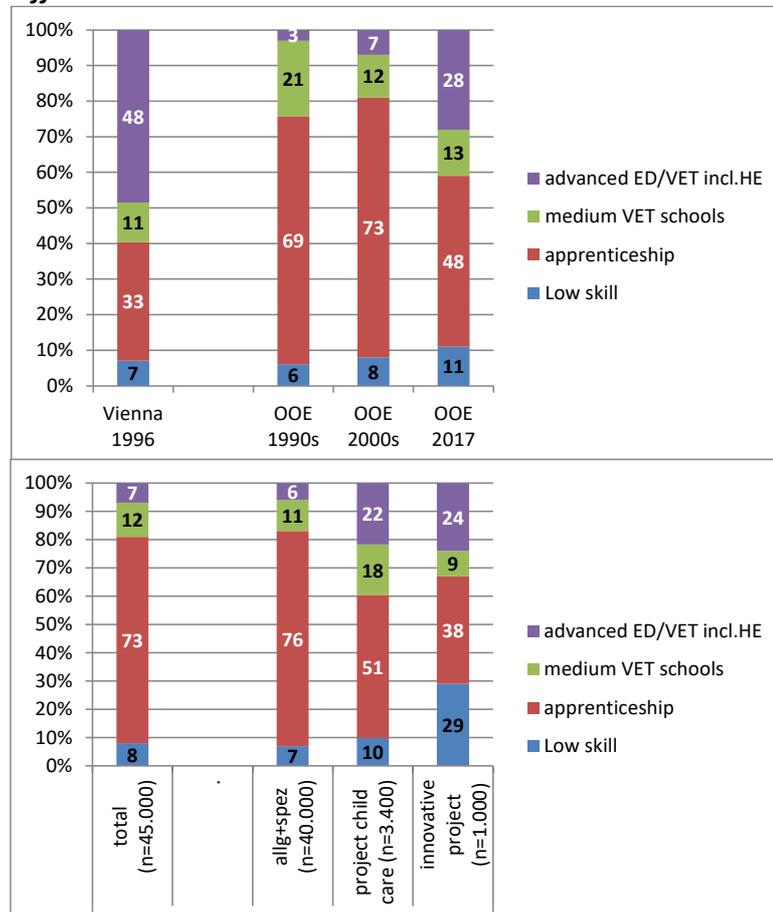
Access was opened first at the upper secondary level, and later gradually also for higher education with maximum income levels, as a first step only for older graduates, and then also generally with maximum income levels that were successively inflation adjusted.

A comparison with a similar scheme in Vienna at the end of the 1990s that had no restrictions by educational background shows the different educational structure in the different regions (Figure 16). The comparison over time in OOE also shows the increasing inflow of the upper level educated groups. The comparison of the sub-schemes with and without eligibility rules of educational background also shows that the (very small) open schemes had a much higher enrollment of the upper level educated groups (however, because of the compensatory practices also of the low educated).

The comparison also shows, that the inflow of low educated was not higher in OOE, compared to Vienna. So, for this group the compensatory function did not work very well despite the different rates of support.

¹ „Sollte allerdings das Bildungskonto – wie mancherorts diskutiert – generell auch für neue Zielgruppen (z.B. Maturanten) geöffnet werden, wäre dies wohl eine argumentative Untermauerung der Vorteile einer einkommensabhängigen Staffelung. Grundsätzlich wird aber eine generelle Einbeziehung von Maturanten in das Bildungskonto nicht befürwortet. Die gesellschafts- und bildungspolitisch wichtige Förderung von ‚Bildungsbenachteiligten‘ wäre dadurch gefährdet und auch die Definition und mediale Ansprechbarkeit der primären Zielgruppe würde ‚verschwimmen‘“.

Figure 16: Educational background of participants in Bildungskonto Vienna 1996, and different times and versions in OOE



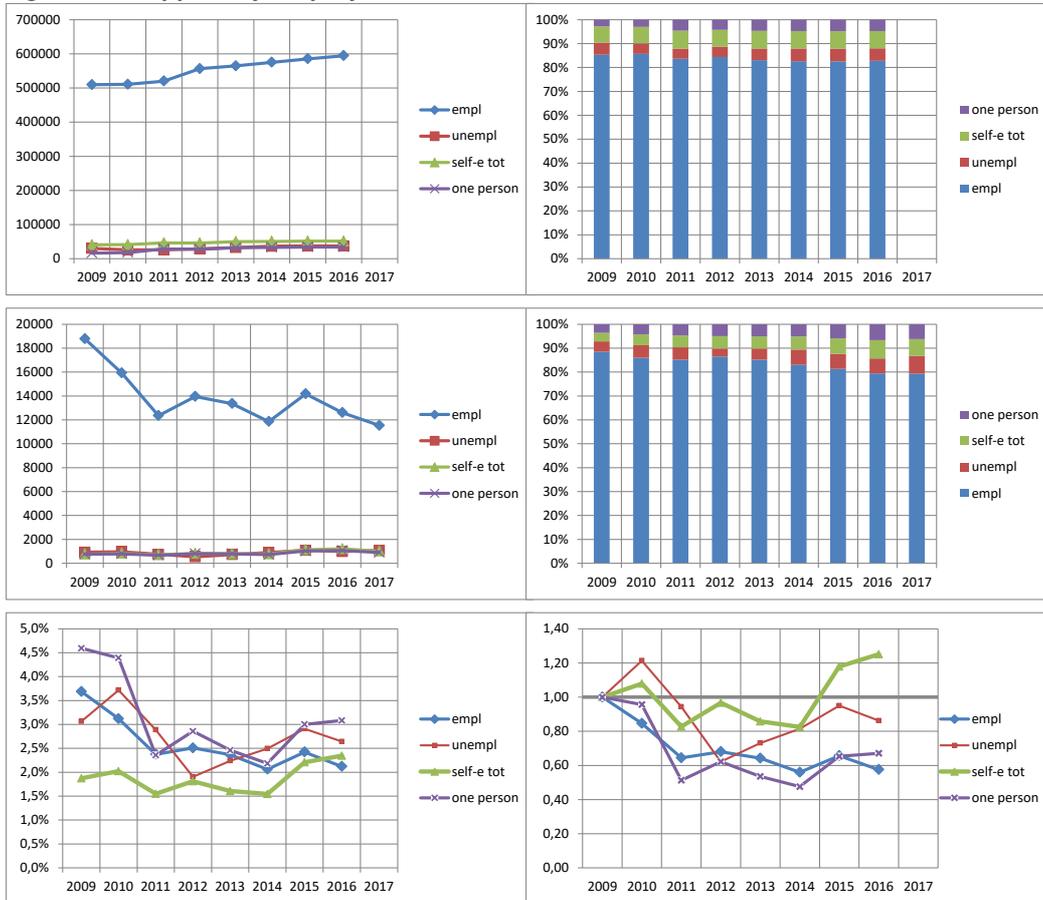
Remark: upper panel compares the Vienna scheme with OOE at different point in time; lower panel compares the OOE total participation with sub-schemes in the early 2000s

Source: Authors figure based on Leitner, Lassnigg 1998 (Vienna), Blumberger et al. 1999, Affenzeller et al. 2004, Land OOE 2017

Opening for non-standard employment

The opening for non-standard employment by designing the new target groups in the 2000s did not lead to much participation by these groups. In 2010 one-person enterprises were included as target group, and from 2015 also free lancers, marginally employed, and small entrepreneurs were added. The statistical information only allows the identification of the self-employed categories, the free lancers and marginally employed are subsumed under the employed category and not specifically identified (thus analysis is not possible).

Figure 17: Support by employment status, absolute, rates, index 2009-17



Remarks: upper panel total numbers in population, medium panel applications, lower panel left: rate applications/total, right: index of rate, 2009=1.00

Source: Authors figure based on Land OOE 2009-17, employment statistics (Abgestimmte Erwerbsstatistik) 2009-16

The categories of self-employed can be compared to the employed and unemployed figures. The rates of application have become more similar in 2013, all are between 1,5% and 3%, the rates of employed and one-person enterprises are declining, the rates of self-employed and the unemployed are rising, in particular since 2015. The rise in self-employed thus indicates some opening for non-standard employment, however, this is contradicted by the development of the one-person enterprises. So clear conclusions cannot be drawn; one should anyway have in mind, that the share of these groups still remained small (10% in population, a bit more among applications).

Project based sub-program for persons (women) providing child care and returners to employment

Specifically, for outreach to this target group the *Besonderes Bildungskonto* was developed and provided from the beginning of the program 1993 until it was discontinued in 2010. The concept was to design courses at local levels that provide the content as well as the supportive environment for women engaged in different situations related to child care responsibilities.

The application was done group-wise by the education providers, and local outreach campaigns and meetings were a compulsory part of the measure. The regulations included specific quality requirements for this measure (Regulation 2007-09). Trainers must fulfil specific requirements:

- Qualification in social pedagogy
- Practical trainer experience in adult education
- Qualification in communication and personal education
- Full course management
- Facilities for child care are desired

Until 2006 about 1.500 persons were supported by this part of Bildungskonto. This means on average per year about 100 compared to a potential of about 14.000 births on average per year or respective almost the double number of persons in maternity leave.

4.1.7 Adult education in Upper Austria

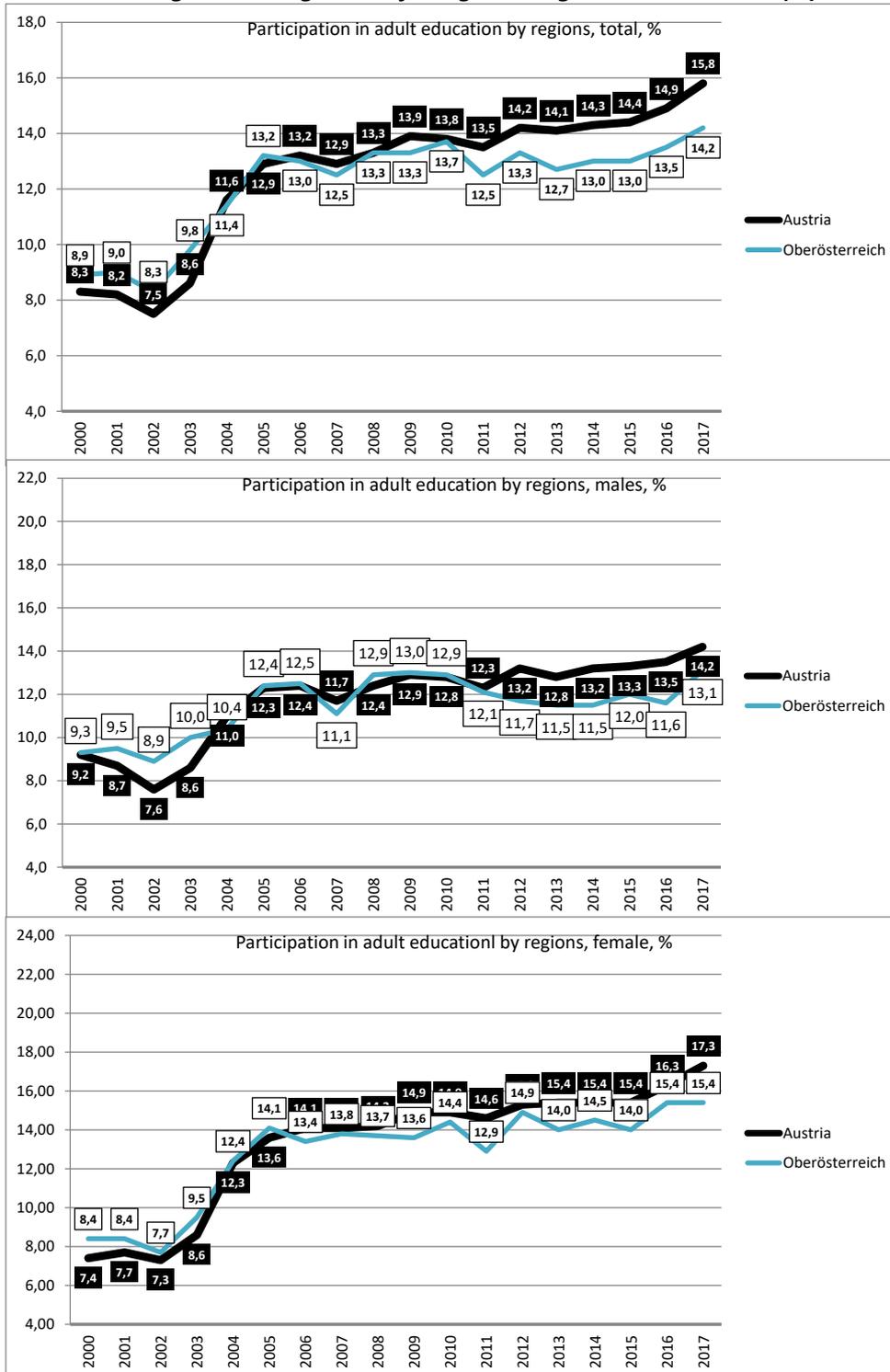
The Bildungskonto aimed at the expansion of participation in regional adult education, and some early assessments have indicated that it might have worked in this direction (see section 4.2 about previous evaluations).

This issue can be tentatively reviewed for a longer period by using the European indicator about participation in lifelong learning (see detailed figures in ANNEX 7.6). This review is unfortunately distorted first by the starting of comparable data from 2000, and thus leaving out the early period, and second by breaks in the time series because of observational and statistical changes in the data production in 2004, and more minor in 2006. The problem is that at the time of the statistical modifications also substantial changes in the position of Upper Austria on the participation indicators occurred.

The figure shows that exactly at the time of the break in the time series, Upper Austria changed its trend from rising to declining, and its position from above average to

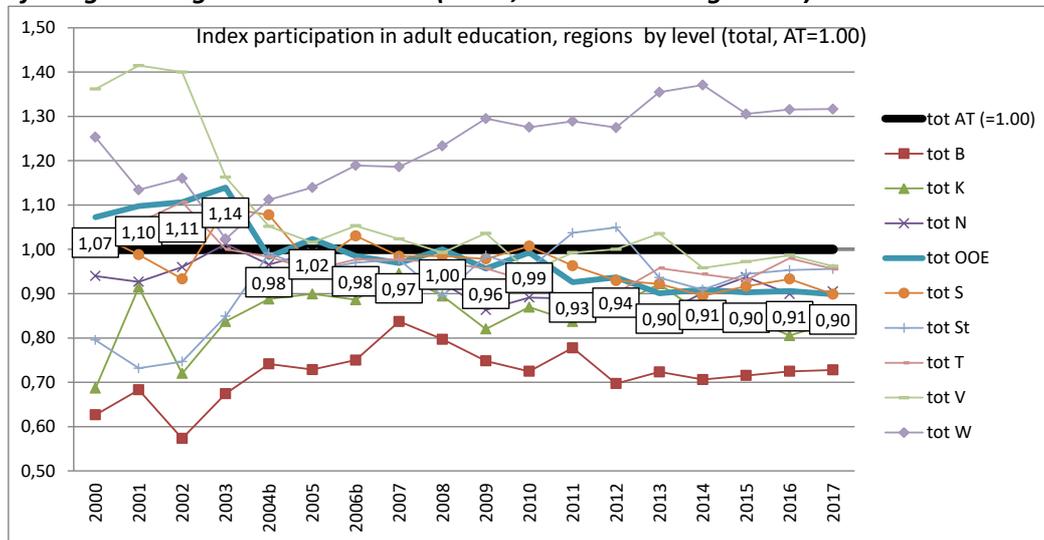
average, and later from 2011 further downward. Unfortunately, we lack also the exact information about eventual changes in the regulations during the years 2004-06, despite the subsequent information from 2007 on does not indicate such changes. The time series from 2011 can be seen consistent, and here we indeed see a declining participation in the regional indicator following the reform 2011.

Figure 18: Participation rate in adult education in Upper Austria compared to Austrian average according to EU lifelong learning indicator 2000-17 (%)



Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

Figure 19: Participation in adult education in Austrian regions according to EU lifelong learning indicator 2000-17 (Index, Austrian average=1.00)



Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

4.2 Previous formal evaluations and their use for development and reforms

Formal evaluations have been run in the early period of the scheme, however, rather of limited scope.

4.2.1 Policy related assessments (1999-2008)

In the early period descriptive expert assessments are available from the side of political protagonists and stakeholders of the scheme (Bauer/Hofer 1999, Bauer 2003, Bauer 2008).

Bauer and Hofer (1999) have outlined important questions for evaluation that have never been answered:

- Impact of Bildungskonto on participation in further education: should the future policy of the scheme still aim on the general stimulation of participation, or focus more on specific target groups through more specific steering?
- Impact of support on prices in adult education: high rises in prices of adult education have been observed, so questions about how such responses to the support at the side of providers might be precluded are asked, e.g., upper thresholds of prices of courses eligible for support

- Impact on firms’ support of further education: might firms shift costs of further education to public budgets?
- Target groups: should support be extended to people with upper-medium level educational credentials? If yes, how can a crowding out of low educated be precluded?
- Steering mechanisms: how does the steering through the project-oriented measures work?
- Quality development: how does the newly developed quality framework work? How should its further development look like?
- Interaction with social security: How is participation in further education related to social security regulations? How can the necessary co-operation with labor market policy be developed?

Most of these questions have not been tackled so far. Bauer (2003, 2008) has given some assessments of the impact of the Bildungskonto during the early period.

Table 8: Comparison of ILAs Upper Austria and Austria total (2005-07)

2006	Budget T. EURO	Users	Employees		User rate %	Budget/ Employee EURO	Av. Payment EURO
AT	19.160	35.449	3.165.935	AT	1,1	6,1	540
OOE	8.860	20.173	553.251	OOE	3,6	16,0	439
% OOE	46%	57%	17%	Index OOE/AT	3,27	2,62	0,81

Participation in adult education/training, national and OOE

2006	Population	Labor Force	LF 25-44y	LF 45-64	LF men	LF women
AT	25%	25%	27%	20%	24%	25%
OOE	31%	30%	32%	25%	29%	30%
Index OOE/AT	1,24	1,20	1,19	1,25	1,21	1,20

Participation in different schemes, OOE (rounded figures)

2007	Total adult education	Bildungskonto	AK Leistungskarte	AK Bildungsbonus
Persons	155.000	17.000	35.000	11.000
EUROS		6.900.00	560.000	750.000
% of total		11%	23%	7%

Evaluation of AK schemes, groups that received support (total 6,9% of all members=employees)

2005-06	Sex	Age	Status	Firm size
Above Av.	f	25-34y	White collar	Small
	10,6	8,2	8,3%	7,2%
Below Av.	m	50-54y	Blue c	
	3,8	5,5	4,9%	

Source: Bauer 2008.

Bauer 2003 shows a much higher representation of medium level qualified among the participants in Bildungskonto (80%), compared to Austrian employees (50%), and to other schemes supported by the AK (65%), and in particular to the frequent further education participants in the region (dominated by higher level education). Bauer (2008, p.6/slide 2) demonstrates that adult education participation rates are higher around 20% in Upper Austria than on Austrian average.

Bauer (2008, p.5/slide2) compares the Upper Austrian Bildungskonto with other regional state ILAs in Austrian regions and at the national level in 2006, and demonstrates that Upper Austria was a forerunner at this time with around half of users and budget, and around three times user rates and budget per employee. Only the average payment was higher in the smaller schemes.

The combination of evaluation results of AK OOE schemes gives an impression of how they might combine (Bauer 2008, p6/slide 1). About one third of employees have participated, and the various schemes might support up to one fourth of participants if all overlap, and to more than one third if not.

4.2.2 Research based evaluations

Research based evaluations have been commissioned between 1999 and 2008. They are still not publicly available; thanks to the administrative unit they were available to us. Two focused on the projects related to child care and returners that were anyway abandoned.

Figure 20: Synopsis of research-based evaluations by IBE

+1999, Evaluierung des Bildungskontos des Landes Oberösterreich [Evaluation of the Bildungskonto of the Province of Upper Austria], , authors: Walter Blumberger Helmut Dornmayr Claudia Thonabauer, Case studies of educational institutions (n=11), representative survey among participants (n=1.520), region of Upper Austria.

+1999, Evaluierung des projektbezogenen Bildungskontos des Landes OÖ [Evaluation of the project-related Bildungskonto of Upper Austria], commissioned by the regional government of Upper Austria, authors:, Blumberger Walter, Dornmayr Helmut, Thonabauer Claudia. As part of a comprehensive evaluation of the Upper Austrian Bildungskonto the specific instrument of project funding was also evaluated in terms of relevant success criteria.

+2004, DATAMINING Bildungskonto des Landes Oberösterreich [DATAMINING Bildungskonto of Upper Austria], commissioned by the regional government of Upper Austria, trade department, authors: Auer Sabine, Blumberger Walter, Niederberger Karl. The data provided to the IBE consists of granted and rejected applications for funding through Bildungskonto for the period from January 1, 2000 to August 22, 2003. Focus of this study: Sociographic structure of recipients, regional distribution of Bildungskonto recipients, comparison of labor force with Bildungskonto recipients. The study aims to identify ZIP code regions that still have potential demand for support by Bildungskonto among "disadvantaged" groups of people (women, 45-year-olds and older people, low-educated people). It turns out that the Bildungskonto in the Upper Austrian regions is used to varying degrees.

+2008, Evaluierung des Projektbezogenen Bildungskonto des Landes OÖ [Evaluation of the Project-Related Bildungskonto of Upper Austria], commissioned by the regional government of Upper Austria, trade department, authors: Kellermayr Sabine, Ratzenböck-Höllnerl Iris, Reder Martina. This study aims at identifying factors to be considered for tailor-made further education in the sense of sustainable subject oriented support and at working out of improvement possibilities of the project-related Bildungskonto: preventive and intervention instrument for returners and persons on parental leave for (re-) integration into the labor market, necessity of "individual products" through a series of individually tailored measures.,

Source: Project documentation, webpage IBE <http://www.ibe.co.at/> Orig. German, translation by authors.

1999, evaluation of the early years of Bildungskonto (1994-99)

The purpose of this evaluation was to find points for improvement of the scheme for the next period of implementation 2000-04 (Blumberger et al. 1999). It gives some descriptive survey-based information about the early period 1994-99 that can be compared to the statistical data 2009-17.

Case studies with providers have analyzed the access conditions. The information of participants before attending was assessed diversely; most institutions – particularly the big ones – routinely provided the information material in their program brochures as well as at the begin of the courses and helped with the applications. The requirements were perceived very difficult and complicated. Overall the scheme was not perceived as stimulating additional access in this period.¹ The financial support could stimulate decisions in cases of higher costs, or low incomes. The institutions also felt badly informed about the concrete regulations, and demanded documentation about applicants.²

Quality assurance was mainly organized through surveys among participants. The bigger providers (WIFI, bfi) were ISO 9001 certified at these times (p.19), when the OOE adult education quality certificate (OOE Qualitätssiegel) was just started.

Influence of Bildungskonto on prices was denied by the providers, the main justification for this appraisal was that it was too small in scope.

A shifting of funding of firms to the Bildungskonto was also generally not perceived (other measures were more attractive; however, certain cases were known, that firms paid the individuals' part of costs, or have sent older participants to training). The survey of participants indicates that overall 10% to 20% participated in relation to wishes of the employer (p.52), 8% had their training time fully or partly acknowledged as working time by the employer, 10% received additional support by their employer for participation (these figures probably overlap).

In their subjective assessment of effects of participation in relation to beforehand expectations participants gave positive estimations to aspects like learning new things

¹ „Mehrheitlich waren sich die befragten Vertreter der Erwachsenen-bildungseinrichtungen einig darin, daß das oö. Bildungskonto zwar Weiterbildung fördert, diese aber eher nicht initiiert.“(p.12)

² „Von über 50 % der befragten Erwachsenenbildungsträger wurde der Wunsch geäußert, einerseits Informationen über die Anzahl der tatsächlich geförderten TeilnehmerInnen zu bekommen um so den Erfolg ihrer Beratungsbemühungen messen zu können, anderer-seits aber auch umfassendere Informationen über das Bildungs-konto selbst zu erhalten, da sie sich in vielen Bereichen uninformiert fühlen.“(p.13)

„Das grundsätzliche Informationsmanko der Bildungsträger zog sich wie ein roter Faden durch alle Expertengespräche. In Anbetracht der Tatsache, daß bei der Repräsentativbefragung die Be-fragten angaben, daß die persönliche Beratung seitens des Schulungsträgers die wichtigste Erstinformationsquelle ist, wirkt sich dieses Informationsmanko auch auf die betroffenen KursteilnehmerInnen gravierend aus.“(p.14-15)

(90%), improvement of quality of work (80%), securing workplace (40%), acquiring new credentials (25%), creating new contacts were beyond expectations (30% expected to 40% experienced), however, employment related aspects like promotion (60% to 40%), job mobility (50% to 40%) or income (40% to 30%) were fulfilled markedly less than expected (p.52, roughly rounded magnitudes).

To some extent low educated have gained additional credentials. 11% have gained an apprenticeship credential, however, low educated were less represented among participants than among the overall younger 20-30-years old population that was taken as reference group in the evaluation.¹

Table 9: Occupational status, economic sectors, course types of participants 1994-99

STATUS	Time of 1 st particip.	Time of survey	ECONOMIC SECTORS	Em- ployees OOE	Partici- pants	COURSES	Partici- pant
Student, apprentice	4	4	Agriculture, forestry	1	3	Sum exams	40
Unskilled workers*	7	4	Construction	10	11	2 nd chance maturity	8
Skilled workers*	32	26	Manufacturing	27	15	Prep.FH	1
White collar*	44	50	Energy	1	5	Apprent. Master	16
Self-employed	1	5	Retail	17	16	Entrepr.	7
Unemployed	4	4	Tourism, catering	3	3	Book keeping	5
Child care, household	4	4	Transport	6	4	Apprent. Trainer	3
Other	2	3	Banking, insurance	3	3	Languages	6
			Public sector	14	4	Person./ Comm.	4
INFORMATION	% 1st time heard about BK from...		Education	5	1	Occu- pational	34
ED.PROVIDERS personally		40	Health	4	10	IT	21
Personal acquaintances		25	Other services	10	8	Health	5
ED.PROVIDERS catalogue		19	Other	-	17	Crafts	3
Government OOE advertising.		6				Metal	2
Other		5				Business	2
AMS		3				Quality/ security	1
ED.PROVIDERS advertising		1				Other	16

*A traditional legal distinction in Austria between Arbeiter (blue collar) and Angestellte (white collar), generating different working regulations, more favorable for Angestellte, has become more blurred, by making conditions more similar, and by transferring highly qualified core workers from the Arbeiter to the Angestellte scheme.

Source: Authors based on Blumberger et al. 1999.

¹ „Immerhin konnten 11% der Befragten seit der erstmaligen Inanspruchnahme des Bildungskontos einen Lehrabschluss erreichen bzw. ‚nachholen‘.“ (p.32)

„[...] betrüge die (geschätzte) Relation von PflichtschulabsolventInnen zu LehrabsolventInnen (mit oder ohne Meisterprüfung) beim erstmaligen Einstieg in eine mittels Bildungskonto geförderte Weiterbildungsmaßnahme etwa 1:3,4 während diese Relation unter den 20-30jährigen Oberösterreichern etwa 1:2,7 beträgt“ (p.33)

Three out of four participants had medium level occupational status, some shifts occurred between skilled and white-collar workers, the low proportion of unskilled declined (7% to 4%) , and the very low proportion of self-employed increased slightly (1% to 5%); unemployed and persons in child care or household responsibilities also participated by low proportions (4% each).

Retail, manufacturing, construction, and health were the sectors most frequently represented among participants, health more and manufacturing less frequently than among employees, construction and retail show similar proportions.

The courses were segregated by sex, male participants attended more frequently courses preparing for apprenticeship masters exams, entrepreneurship exams, and crafts (together 45%), females attended book-keeping, health, language, and personal competences courses (together 33%), IT-courses were the category most frequently by attended by both sexes (females 25%, males 18%).

- Courses preparing for apprenticeship masters, crafts, and quality/security were most successful for securing work places
- Improved quality of work and learning new things were most often related to health courses
- Health courses and quality/security most often corresponded most often with wishes of employers

The two biggest institutions enrolled together 81% of participants (WIFI 57%, bfi 24%), all other institutes less than 5%.

Deadweight effects can be inferred from two questions:

- One was how many courses would have been attended without support through Bildungskonto? 5% responded no courses, 32% less, and 62% the same amount; (p.67) these responses were related to the income of participants: compared to the group that would have attended the same amount the group with less attendance earned 4% less, and the group with no attendance without support earned 20% less.¹
- The other question was, whether the participants have attended more courses than planned before because of the support through Bildungskonto? 38%

¹ „Jene Personen, welche antworten, sie hätten ohne Bildungskonto ebenso viele Weiterbildungsmaßnahmen besucht, verfügen über ein durchschnittliches Nettoeinkommen von 16.100,- ATS, jene, die ohne Bildungskonto weniger Veranstaltungen besuchen hätten können, verdienen durchschnittlich 15.400,- ATS, während jene, denen ohne Bildungskonto überhaupt keine Weiterbildungsmaßnahmen möglich gewesen wären, lediglich über ein durchschnittliches Monatseinkommen von 13.100,- ATS verfügen.“ (p.68)

responded yes (so an inference for a more marked deadweight would be quite similar from those questions at above 60%).

Recommendations concerned the following issues:

- Information
- Transparency and understandability of regulation
- Standardized response by the administration to application, including estimated time of payment
- Making ‘internal rules’ of decision more explicit (e.g., the testifying procedure in case of retraining-Umschulung)
- To abandon the lower threshold of course costs (at this time ATS 2.000.--)
- To shift the upper threshold of total course costs upwardly
- Stronger support of acquisition of apprenticeship credential as a first qualification, and of low educated generally
- Stronger support of formal exams for women
- No direction but an open deliberation about pros and cons of income-related support and also about support for holders of the maturity exam was recommended by the evaluators.

Important topics of reasoning were the questions of how the scheme would influence the prices in the education and training market, and how the eligibility of background qualification levels should be handled.

Concerning prices, the point was made against the lower threshold that it would incline providers to increase the prices of cheaper measure to become eligible, and thus drive up the average. On the other hand, the maximum amount would limit access to programs providing more elaborate gains in qualification.

Concerning the accessibility of holders of the maturity exam the evaluators argued against it, because this would impede the compensatory goal of the scheme, and different rates for different qualification levels, or income related support would make the already complicated regulations of the scheme even more complicated. However, they did not formulate their position as a recommendation.

2004 datamining about period 2000-03

Purpose of this study was an analysis of the clients’ profile, the sub-regional provision, and the participation in Bildungskonto, based on the records from the administrative implementation (Affenzeller et al. 2004).

The study gives mainly a picture of the representation of sub groups in the parts of the scheme, and across sub-regions at the time analyzed (p.21)

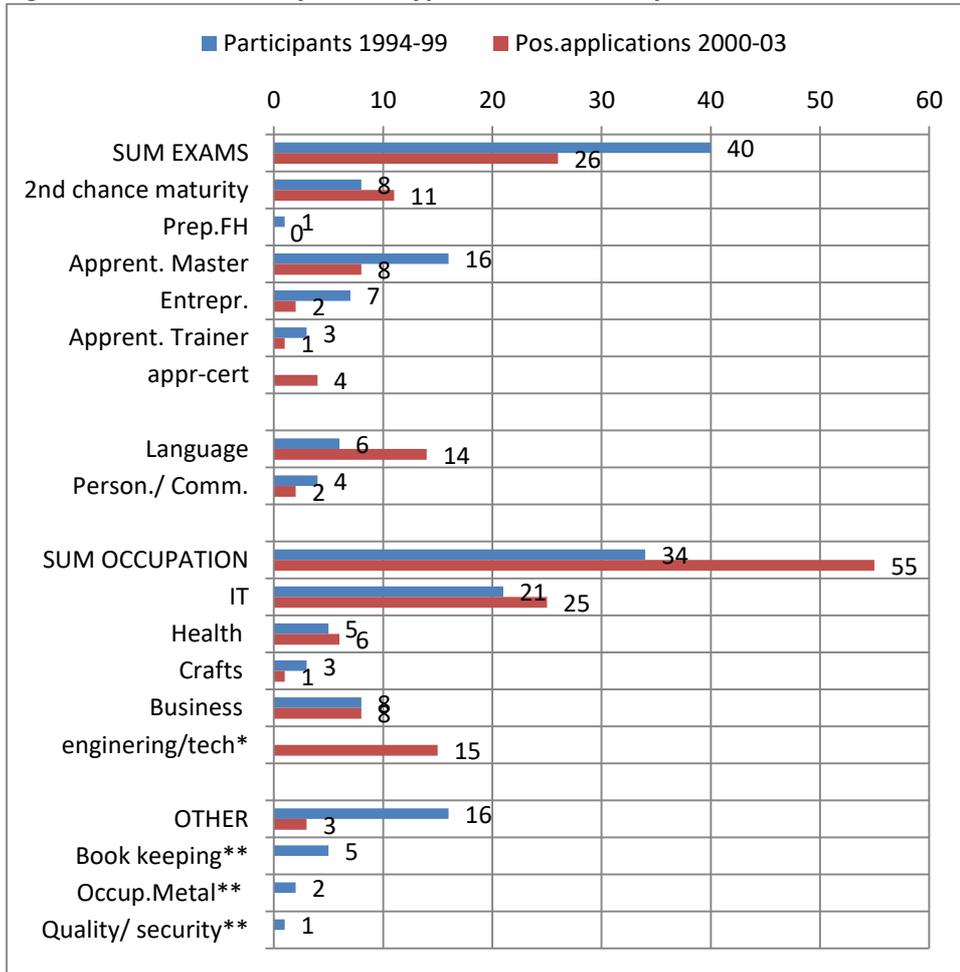
- Over-represented sub-groups were women¹ and holders of an apprenticeship certificate
- Under-represented groups were older (45years+) people in general and older women in particular, and low educated people (compulsory education maximum)
- Two out of 11 sub-regions were represented at low level, however, some remote rural regions were represented above average
- Rejected applications were more often from 45+years applicants, the sub-schemes were represented like average among rejections (p.32).

Compared to the 1999 survey-based information the information available in the administrative records was more limited. The employment status was not differentiated (e.g., according to levels or self-employed), the proportion of unemployed (7% vs. 4%) and of persons from child care or households (8% vs. 4%) was higher than in the previous period, from the new educational leave scheme 6% of participants were additionally supported for the living expenses (p.77). The identified economic sectors differ very much from the previous study; however, more than 40% had no information about this variable. Less than 1% of participants were identified from typically self-employed sectors (Freiberufler).

Between the 1990s and the early 2000s the preparation for exams declined, within that category mainly the masters on top of apprenticeship have declined, the support of the external access to the first-rate apprenticeship exam was newly added. The occupational courses not leading to formal exams and the language courses have expanded (some part might have been only shifted from the big ‘other’-category in the 1990s.

¹ In this period the proportion of the project based part for (women) child care and returners was at 7% (went down to below 3% until the 2009 evaluation).

Figure 21: Distribution of course types 1990s and early 2000s



* this category is not specified in the earlier period

** these categories are only specified in the earlier period, book keeping exams and quality security are included in the business category

Source: Authors figure based on Table 9 above (1994-99), and Affenzeller et al. 2004, p.151-152

2008 project based Bildungskonto (child care, returners)

This evaluation conducted in 2007 had its objective in questions of improvement of this part of the scheme. The focus was laid on the general framework conditions of employment for women with child care responsibilities in the region (external factors not related to qualification, model of “vicious circle of discrimination”, p.57-62), and how the project-based part of Bildungskonto has fit into these conditions. At this time the proportion of applications was 2.9% of all applications. The evaluation gives a detailed qualitative analysis of the situation of this small group, and indicates some interesting phenomena that might be also interesting more generally:

- About 400 adult education providers with the quality approval existed at this time in OOE, quite widely distributed locally in the region (p.15-16)
- The number of applications in this part of the scheme (and also in the innovative project-based part) has dropped by more than half between the first and second year, so the interest might have been overestimated at the time of introduction (p.20)
- 98% of participants were enrolled in courses by the “big providers” WIFI (53%) and bfi (45%) (p.35)
- Impact was only/mainly indicated by input-related aspects by stakeholders (reach out, education demand, higher levels of qualification, etc.)
- IT courses were dominating, however, at the very basic level of ECDL (European Computer Driving License), this concerns two thirds of mentioned courses (p.44, p.76)¹
- Severe difficulties of finding employment occurred among participants²
- Compromise with choice of course topics in order to receive extended educational and maternity leave (e.g., English basic despite applicant was already proficient; p.51, 63, 64)
- More personal and general than occupational gains (p.52)
- None of the participants has experienced occupational counselling around participation (p.57, p.71)³
- Information about support mainly through providers’ programs and personal acquaintances, only about one fourth through outreach activities, several information problems occurred (p.63)

The recommendations of the evaluation focused much on framework conditions (supply and costs of child care, working time flexibility of firms, opportunity costs of employment, qualification and assessment of opportunities), the complex difficult conditions would need a mix of financing measures. More concrete recommendations concern

- Career counseling
- Inclusion of the right for further education as part of the regional equal treatment/non-discrimination legislation

¹ „[...] weg von der Massenware ECDL“ (p.38)

² One participant: „Ich werde es nicht schaffen, bei mir ist es schwierig. Ich bekomme nur Arbeit als Putzfrau

[angeboten], das will ich nicht, ich habe Matura gemacht.“ (p.49)

„Ich bin zuerst einmal zum AMS gegangen und wegen eines Teilzeitjobs gefragt. Das erste was ich zu hören bekommen habe war: Sie sind sowieso nicht vermittelbar, Sie haben zwei kleine Kinder. Da habe ich mir schon gedacht: das kann es jetzt nicht sein. Ich war ein Dreivierteljahr als arbeitssuchend gemeldet und habe einen einzigen Job vermittelt bekommen. (...) Man muss sich selbst durchkämpfen. Es ist sehr schwierig wiedereinzusteigen.“ (p.54)

³ „Die Möglichkeit der Bildungsberatung wird von den PBK-EmpfängerInnen aufgrund ‚Unwissenheit‘ nicht in Anspruch genommen, bei (Neu-)Orientierung allerdings befürwortet.“ (p.71)

- Individualization of support (courses too inflexible for individual demands)
- Incentives for firms (mentioned “Chèque Formation” in France)
- Synergy with AMS
- Further education portfolio (Weiterbildungspass) and regular analysis of use of further education provision

4.2.3 Official public audits (2009-11 around reform of regulations)

Public audits have been provided by the regional and national courts between 2009 and 2011, at the time of reorganization of the measure, and of reaching its quantitative peak.

2009 Regional Court of Audit *Initiativprüfung (2004-07)*

The 2009 audit (LRH OOE 2009). took place after the responsibility was shifted from the economic department to the education department in 2008. The report refers explicitly to the research-based evaluations summarized above.¹

Main points of critique were

- the complexity of regulations, mainly the project-based ones, and
- discrepancies between the funds allocated in the regional budget and the real demand for support (e.g., 2008-09), that had led to adaptations outside of regular budgeting,² and also to some part to substantial delays up to 6 months of paying the support to the individuals. These delays have led also to interventions by participants and a high amount of management of these complaints (up to 50% of total time for administration).³

¹ „Die Zielerreichung des Bildungskontos wurde mehrmals durch das Institut für Berufs- und Erwachsenenbildungsforschung an der Johannes Kepler Universität Linz hinterfragt. 1999 wurde das allgemeine und spezielle Bildungskonto evaluiert. Dabei zeigte sich, dass Wiedereinsteigerinnen bzw. Wiedereinsteiger sowie Personen in Karenz ihre Weiterbildungschancen nur nutzen können, wenn die Angebote auf die speziellen Bedürfnisse dieses Personenkreises Rücksicht nehmen. In einer Studie aus dem Jahr 2004 wurde schwerpunktmäßig der Kreis der bisher geförderten Personen in Bezug auf Zugang zur Förderung und daraus untersucht. 2005 analysierte das Institut in der Studie „Familiengerechte Bildungsförderungspolitik für Arbeitnehmer und Arbeitnehmerinnen“ die Vereinbarkeit von Familie und Weiterbildung.

Die Evaluierungsergebnisse flossen in die Gestaltung der Förderrichtlinie ein (z.B. Einführung der Förderung von Projekten, Ausdehnung der Förderung auf Maturantinnen bzw. Maturanten).“ (LRH OOE 2009, p.4-5; highlighted by the authors)

² The court looked at the discrepancy between the budget planning (Voranschlag) and the final budget (Rechnungsabschluss) only, the figure above (Figure 5) compares the planning and the figures from the administrative unit about support expenditure (Land OOE 2009-17, and documented figures from the unit and other sources).

³ „Dies führte dazu, dass gegen Jahresende eingereichte und auch bewilligte Förderansuchen erst im zweiten oder dritten Quartal des Folgejahres tatsächlich ausbezahlt wurden.“ (LRH OOE 2009, p.6) „Der Zeitabstand zwischen dem Bewilligungsschreiben und der tatsächlichen Überweisung auf das Konto der Empfängerin bzw. des Empfängers kann – abhängig vom Zeitpunkt der Antragstellung – bis zu sechs Monaten betragen.“ (p.9)

The complexity of regulations has increased the need for counseling and problems with correct applications that were processed back and forth between the administration and the participants; an abundance of patience with clients on the side of the administration was also criticized.

A substantial discrepancy was shown between the allocation for the project-based scheme of Besonderes Bildungskonto for child care and returners and the lower than expected actual enrolment in this measure. The allocated sum for these projects and the actual paid sum was compared for the period 2004-07, showing that the discrepancy has increased from 20% in 2004 to 56% 2007, with a parallel reduction of the allocated fund for these projects by around 10%.

Another critique was that the substantial administrative effort for the inspection of applications was wasted for very small amounts of support, thus a minimum threshold for support should be established, to reduce bureaucracy (remember the opposite critique in the evaluation 1999 for the former existing and then abandoned lower threshold driving up the prices.¹

The support of one-person enterprises has been extended in 2007, however, the regulations have not been adapted timely.²

Explicit recommendations were given for the new regulation from 2010 (LRH OOE 2009, p.2):

- To skip the project support of Besonderes Bildungskonto for child care and returners and integrate this target group into the normal scheme
- To make better budget decisions, and reduce the period between decision and actual refunding to the participants
- To implement a lower threshold for support to reduce administrative effort
- To inform the public in transparent and timely manner about changes in the regulations.

¹ „Damit die steigende Nachfrage mit den vorhandenen Ressourcen bewältigt werden kann, ist es nach Ansicht des LRH notwendig mit der neuen Richtlinie den Abwicklungsprozess zu optimieren. Im Sinne eines adäquaten Kosten-Nutzen-Verhältnisses regte der LRH an, in der neuen Richtlinie eine Förderuntergrenze, zumindest in Höhe der Bearbeitungskosten, aufzunehmen.“ (LRH 2009, p.7)

² „Die Richtlinie sieht vor, dass Ein-Personen-Unternehmen nur dann gefördert werden, wenn sie keine Arbeitnehmerinnen bzw. Arbeitnehmer beschäftigen. In Abstimmung mit dem politischen Referenten wird seit 2007 auch eine Förderung gewährt, wenn im Ein-Personen-Unternehmen auch maximal zwei geringfügig Beschäftigte bzw. zwei Lehrlinge mitarbeiten.

Für den LRH war die Ausweitung der Förderung von Ein-Personen-Unternehmen zwar nachvollziehbar, durch die unterlassene Anpassung der Richtlinie kam es jedoch zu einer Ungleichbehandlung der potentiellen Förderwerberinnen bzw. Förderwerber. Er empfahl daher, jede Änderung in den Förderrichtlinien umgehend öffentlich bekannt zu machen.“ (LRH OOE 2009, p.9)

2010 Regional Court of Audit Folgeprüfung

The implementation of the 2009 recommendations was positively evaluated in this report (LRH OOE 2010), The new regulations 2010-15 have simplified the structure, the projects of the Besonderes Bildungskonto have been abandoned, a lower threshold for the support of courses has been established at EURO 90,-- and an electronical tool for the application has been established from June 2010 in addition to the previous procedure.

The budget planning was still under some problems and was expected to be resolved until 2011.

2011 Austrian Court of Audit Labor Market Policy in Vienna and Upper Austria (period 2005-08)

The Austrian Court of Audit has made an assessment as part of an exemplary audit of labor market policy in the regions of Vienna and Upper Austria (RH 2011). The analysis covered the period between 2005 and 2008 (partly 2009).

The Bildungskonto was observed as the main measure of the regional contribution to labor market policy, much bigger than comparative measures in Vienna at this time. The assessment of the regional court and the evaluation 2004 (see above) was taken on, and a focus was laid on deadweight and the lack of impact evaluation.¹ The estimation of deadweight followed the 2004 evaluation, saying that only 37% of participants would have not participated without support (p.88).

Concerning the Bildungskonto more “sustainable” courses should be supported, mainly defined by the orientation to formal exams.²

4.2.4 Summary and main conclusions/generalizations from formal evaluations

The evaluations have mainly analyzed descriptive aspects of participation and delivery, in order to improve the Bildungskonto, the basic model was not questioned by the evaluations. Impact also was not really part of the studies. The issue of application after completed education was not questioned for the main groups; however, the project

¹ „Es sollte insbesondere im Hinblick auf mögliche Mitnahmeeffekte eine Prüfung der Höhe des Mitteleinsatzes für die arbeitsmarktpolitischen Aktivitäten durchgeführt werden — wie bereits im Jahr 2006 angedacht.“ (p.121)

² „Das Bildungskonto wäre durch eine Fokussierung auf längerfristige bedarfsorientierte Ausbildungen mit öffentlich anerkannten Abschlüssen weiterzuentwickeln.“ (p.121)

approaches have been set up for specific groups to reduce the problem of paying in advance. These approaches were abandoned for being too complicated, and to some extent also providing problems with needed individualization.

The evaluations provide quantitative and qualitative descriptions about the earlier periods of the measure, in addition to the detailed data 2009-17. Women and apprenticeship completers were overrepresented, older persons, specifically older women and low educated were weakly represented, regions showed mixed participation. The involved education providers are very much concentrated to two big organizations, owned by the two sides of the social partners.

The evaluation results were to some part used for development. Main issues tackled were:

- Information deficits on all sides, also delays of informing the public in transparent and timely manner about changes in the regulations.
- Complex regulations, transparency and understandability of regulation, making ‘internal rules’ more explicit (e.g., the testifying in case of retraining)
- Prices, threshold, upper limit: different directions, in early period to abandon the lower threshold of course costs (ATS 2.000.--), time and again to shift the upper threshold of total course costs upwardly, later to implement a lower threshold for support again to reduce administrative effort
- Responses, payment, standardized response, including time of payment, to make better budget decisions, and reduce the period between decision and actual refunding to the participants
- Steering issues: little relation of delivery to goals and steering, qualification, stronger support of acquisition of apprenticeship credential as first qualification, and of low educated generally, stronger support of formal exams for women; open discussion of income-related support and of support for holders of maturity exam, higher education

Project oriented Bildungskonto

- Strengthen career counseling, individualization of support (courses too inflexible for individual demands)
- Inclusion of the right for further education as part of the regional equal treatment/non-discrimination legislation
- Further education portfolio (Weiterbildungspass) and regular analysis of use of further education provision
- To skip the project support of Besonderes Bildungskonto for child care and returners and integrate this target group into the normal scheme

- Incentives for firms (mentioned “Chèque Formation” in France) and synergy with AMS

5 Main strengths and weaknesses of the scheme

The scheme is not really an account, but a kind of fund, that was to some extent varied over time but has retained the basic structure and mission. After 15 years of steady expansion the scheme has turned into a stagnating path around a reform in 2010. The aim of increasing participation of low educated were never realized, and a net increase of participation of medium level qualified through the measure cannot be proved because of a lack of appropriate evaluations. At least the more specific targeting of the scheme has precluded stronger deadweight that seems the case with unspecified schemes in other regions (Leitner, Lassnigg1998).

A persisting problem of disadvantaged groups is that they must in principle pay in advance for their training, and get it refunded after some time afterwards (in earlier periods there were even quite substantial delays with refunding because of mismatches between the allocated budget and the demand for support); engaged providers have occasionally established mechanisms to reduce the burden, by crediting, partial payments, or arrangements with the administration of direct refund of the support after the course (e.g., for migrants in German language courses). In earlier times a general clause for cases in hardship (Härtefälle) has allowed an overruling of the regulations for support.

In some periods specific projects have been set up in separate parts (Besonderes Bildungskonto and Innovationstopf) for challenging situations, in particular for (women) returners from child care. However, these parts have been discontinued, and the interview partners – who have occasionally been engaged in these projects in different roles – have not really bemoaned the loss of them

Assessment by interview partners of strengths and weaknesses of the scheme

The interview partners were asked an open question about their appraisal of strengths and weaknesses. The responses to this question concerning strengths and weaknesses about the general purposes of the scheme from the perspective of the interview partners are summarized in this section. They did widely agree about the strengths of the scheme, however, in their assessment the majority of strengths were also matched

with weaknesses (Figure 22). Thus, the overall appraisal by the main stakeholders appears ambiguous.

Figure 22: Strengths and weaknesses articulated by interview partners

STRENGTHS	WEAKNESSES
BASIC STRUCTURE	
+Reliable support, clear criteria +Easy to administer, efficient and un-bureaucratic to implement, simple application +Coordinated with (some) other schemes (AK) +Projekt innovation (basically good, but implementation weaknesses)	-Support leads to rising prices by institutions -Different criteria in different regions of Austria, problematic in neighboring locations -Governance, earlier good cooperation between stakeholders faded out with political changes
INFORMATION	
+Well known in the region, further marketed by policy	-Knowledge among target groups not distributed enough for long time (25 years, 1 mio.course participations, 16.000 applicants)
CHOICE, ACCESS BY TARGET GROUPS	
+Choice of courses, freedom of choice for individuals +Reaches target groups well, qualified persons (Fachkräfte), and unqualified persons (Ungelernte)	-Difficult accessible for certain target groups (out of labor force, unreported employment), financing in advance for non-standard employed, orientation and preformed paths preferable
+Widely open for diverse target groups, opening for new groups, access to education for motivated persons, wide range of support	-Regulatory problems, upgrading of many qualifications, gaps of support arise if higher educated are excluded, no clear decisions about support of higher educated
LEVEL OF SUPPORT	
+Level of support well designed, affordability of education	-Height of support, 30% lowest possible border, maximum support too small with more intense/expensive courses
QUALITY, EFFECTIVENESS, IMPACT	
+Quality assurance for courses through restriction to accredited institutions +Cost-effective	-Deadweight by enterprises, individual receipts in case of group wise demand for certain qualifications -Budget cuts too strong, central government should match funds

Source: Interviews with stakeholders.

In particular, the effectiveness of *information* was on the hand seen positively by a majority of respondents, however, one key stakeholder put this under question and

pointed to the relative low participation in relation to the much higher participation in adult education and the wide eligibility to the measure.

The *level of support* was positively assessed for a wide array of participation, however, for more intensive measures of longer duration and/or higher prices the currently reduced rate and the maximum amount for support was also qualified as being too low.

Quality was one the one hand given a positive appraisal because of the requirements in place for quality assurance of education training providers, however, some possible deadweight was also mentioned particularly on the side of enterprises, and the more recent cuts in support were also questioned in terms of the potential impact of the measure for an increase in participation.

The respondents did not mention the role of *counseling* in the implementation of the Bildungskonto in their responses to the question about strengths and weaknesses, despite the dimension of choice and access was addressed in their statements.

5.1 Strengths of the scheme

The scheme was designed for the individual support of vocationally oriented further education (new Subjektförderung as contrasted to Objektförderung as the traditional support of institutions), this was a new and contested policy approach in Austria at the time of its creation in the early 1990s.

It was designed for the medium level qualified (in particular apprenticeship completers), who were normally not supported in further education (and had also received the smallest public funds during their compulsory education period because of the substantial private contributions in the apprenticeship scheme). A goal was the overall increase of participation in regional adult education.

In order to avoid deadweight, the support was varied towards disadvantaged groups in terms of qualification and also towards women not employed because of taking child care responsibilities. *Non-standard employment* was not an objective of the program; some possibilities were added in the course of time by including one-person enterprises (2010), as well as free lancers and very small enterprises with 5 FTE-employees maximum (2015), however, cannot really be evaluated because of lack of information.

There was much emphasis on the specification of targeted criteria for support, the providing actors were cooperating, and the administrative processes were strongly geared to the support of participation, and at the same time to restrict risk of cheating by locating the application procedure to the time after participation.

An innovation program (Innovationstopf) was also established as part of the scheme, that tried to find and establish measures for specific problem constellations. This program was abandoned, and an assessment of its potentials is not possible with the available material.

5.2 Weaknesses of the scheme

For disadvantaged groups and non-standard employed the clear weakness is the requirement of paying in advance, and getting the support time after completion of the measure.

This construction simplifies on the one hand the administration in terms of precluding unjustified payments and recharges, which seems to be a strong overarching goal in the scheme, however, excludes those most in need for support. On the other hand, the regulations concerning the rates and amounts of support were quite complicated.

The assessment of strengths and weaknesses by the interview partners are quite ambiguous. They mostly point to clear conditions and widespread knowledge about the scheme, however, that assessment might reflect their own familiarity and knowledge about the scheme rather than the wider perceptions. This is reflected by the assessment of a main stakeholder, that the number of applications in relation to the much wider participation in adult education and the related eligibility to the support is in fact very small.

5.3 Lessons from reforms and evaluations

One path of reforms was gradual variation of the parameters. During the expansive period until 2010 the factors contributing to expansion are not clear, signs are contradictory. In the restrictive-stagnant period support was reduced. It is not really clear why the path changed, whether the reformed regulations contributed, or some plafond in participation by the targeted groups was reached anyway.

Innovative approaches were taken with the *Innovationstopf*, however, abandoned after being assessed as being too complicated and intricate. Nevertheless, the pilot approach seems interesting for trying out innovative measures to tackle certain challenges. Maybe (some of) the selected topics were a bit too innovative, too far away from the day-to-day-business. Moreover, it can be speculated that more contextual support in the overall

governance and policy field would be necessary for such an innovative laboratory to flourish.

The program part of support for women in situations of care for children demonstrates the difficulties of overcoming these problems with training measures alone, as shown by a qualitative evaluation. That has mainly pointed to the contextual and more common regulatory and habitual issues of pushing women with care responsibilities aside, and restricting their employment possibilities.

Inclusion of self-employed seems quite successful in quantitative terms, however, is disputed politically by the employees' representatives. The measure was originally established as a support for employees (Arbeitnehmerförderung) in the established structure of regional social partnership, complementing existing measures for the employers' side and for agriculture (the latter being a main part of the regional budget). In the erosion of social partnership in the changing political constellations the turn towards the support of self-employed and entrepreneurs provokes political resistance at the side of the employees' organization that feel to be pushed aside. These underlying problems clearly come out of the evaluations in various ways and this shows that an instrumental-technical view alone about how to construct such a measure might be too narrow.

Non-standard employment falls particularly between these political cleavages in Austria, because it basically undermines the established order of a clear separation of employees and employer, and their rights and responsibilities in the social security system and the employment regulations.

5.4 Summarizing strengths and weaknesses

The Bildungskonto has been established as a general measure to support participation in vocationally oriented adult education, based on individual choice (as opposed to previously dominating institutional support), and targeted mainly to medium level employees mostly holding an apprenticeship certificate. The program is delivered since 1993 with an expansive dynamic until 2011, then stagnating. To some extent disadvantaged groups were addressed, in particular by more generous parameters for support and by some specific sub-measures. However, non-standard employment was only partly included into the target groups in the later periods since 2010. This is in line to the general definition of disadvantaged groups in Austrian adult education and labor market policy that has not focused on non-standard employment relations.

The basic structure of the program is guided toward persons who are motivated to participate (application after participation) and can afford to bear the fees in advance (refund after the measure). To a small degree disadvantaged persons or groups were supported individually by helping with the bearing of the fee, and by partly delaying the fee in specific measures for women returners from child care.

The participation in Bildungskonto is concentrated on employees (80%) from younger age groups (60% till 35 years), with medium level apprenticeship (50%) or VET school based (10%) qualifications; women are more frequently represented than men, however, at lower cost. The courses taken are concentrated on non-formal occupational topics (50% to 55%), often in health occupations, and preparation for formal exams (2nd chance school credentials or master on top of apprenticeship, together 25% to 30%), other competences (language and communication/personality) are supported less frequently (15% to 26%).

Different kinds of evaluations were performed during the expansive period (between 1999 and 2011) that have mainly analyzed the delivery and implementation, and did not question the basic model of the program; no impact analysis has been performed. The results show overrepresentation of (younger) women and apprenticeship certificate holders, and low participation by older persons (particularly older women) and low educated, participation by regions was mixed. Participation has been very strongly concentrated to the two big adult education providers owned by the social partners.

Concerning the delivery of the program five topics have come up in these evaluations until 2011: various information deficits, too complex and to some part in-transparent regulations, prices and the upper and lower thresholds, the shape and timeliness of the response to the applications, and some specific aspect of steering (i.e., stronger support of the acquisition of the first apprenticeship credential and of low educated in general and stronger support of formal exams for women, and issues of tackling higher educated persons with maturity exams or tertiary education). Evaluations of the *Besondere Bildungskonto for women with child care responsibilities* have pleaded for improvement of career counseling that was lacking completely in one of the evaluations, have further made broader proposals for support of this target group (i.e. legal right for further education, establishment of a further education portfolio, and incentives for firms with the French “Chèque Formation” cited as an example); finally, to skip this sub-program was justified by the evaluation.

The earlier evaluation results reinforce the current appraisals given by the stakeholders. *Information* might be spread more broadly until today; however, still quite wide gaps in the spread of information might exist, and there might also be a gap between the perspective of the stakeholders who deal for a long time with the established program,

and the wider public. Indeed, the information material has not been much changed since the earlier times, and the specific regulations, and their gradual changes are not so easy to understand. The *level of support* has been reduced substantially, with a parallel increase of the maximum threshold, so participants must contribute more to receive less support. Still the maximum support leaves out more expensive and more intense courses, and the changes might have contributed to the stagnation in participation in the program. The appraisals made concerning the *effectiveness* that the cuts would have been too strong seem justified. Impact assessments are lacking so far, so evidence-based statements about the reach of the goals of Bildungskonto cannot be made.

The basic model of payment in advance, application during or after the course, and repayment sometime after participation in any case creates access barriers for groups and persons in difficult material circumstances; measures to postpone payment or crediting parts of the fee sometimes used to reduce the burden for disadvantaged participants are rather exceptional for the basic scheme. Also, the attempts to support persons with low qualifications have not been very successful despite more generous parameters, thus the support was probably not intense enough to overcome the existing barriers.

The results concerning counseling in the context of the Bildungskonto are mixed. The stakeholders from the AK have pointed to a connection between the Bildungskonto and the educational counseling services of the AK, at least in the early times of the measure. Quantitative evidence about this relationship does not exist; counseling has probably concerned some subgroups of participants who felt in need for this. At the same time evaluations have pointed to substantial information gaps, and in the (small) sub program for women returners from childcare also gaps of counseling have been detected. In the early 2000s representatives of the employees have demanded the inclusion of mandatory counseling at least with more intense support measures, and also the provision of funds from the Bildungskonto for their counseling services. Such regulations have existed and still exist for some support schemes at central level and in some regions, in particular for disadvantaged groups, however, have not been implemented in the Bildungskonto. As a consequence, we can say that counseling might help, however, we cannot base that on documented experience or empirical evidence in Austria. The policies about counseling are mainly based on the belief that counseling would work.

6 Other possible training measures/schemes to increase access of non-standard workers

There is plenty of schemes for support of adult education in Austria. However, an overview about their scope and participation is only partly available. Since the 2000s in the course of developing a lifelong guidance strategy¹ attempts have been done to develop an independent information source about supply and support of adult education. A platform for adult education provides an exhaustive overview about the existing schemes at different levels.² However, figures about the size of the programs and participation are not provided. Because of the high degree of decentralization and the focus of the regional governments on their own areas, information is mostly lacking. The available statistical surveys are based on small samples that do not really allow for local and regional analysis (existing overviews about participation in adult education are rather rough in these terms, see . Lassnigg, Vogtenhuber 2016, Lassnigg et al.2011).

An assessment would need deeper information and analysis. Based on the information about the existing schemes an overview about target groups and kinds of schemes can be given. In the national information platform cited above 182 schemes were found (59 at national and 123 at regional level). Among the measures that directly support participation in adult education 12 types of measures were identified, among them 20 accounts and vouchers similar to Bildungskonto are provided at regional level. Non-standard workers are addressed by the national funds for labor leasing agencies referred to above.³

¹ Material 2008-13 <http://www.lifelongguidance.at/qip/mm.nsf>; Status 2009
[http://www.lifelongguidance.at/qip/mm.nsf/0/490F96C071A3C949C12575530041B2DD/\\$file/LLG_LLL_Gesamtbericht_G_Final_pdf.pdf](http://www.lifelongguidance.at/qip/mm.nsf/0/490F96C071A3C949C12575530041B2DD/$file/LLG_LLL_Gesamtbericht_G_Final_pdf.pdf); conference 2018

https://bildung.erasmusplus.at/fileadmin/Dokumente/bildung.erasmusplus.at/Policy_Support/Euroguidance/Veranstaltungen/Fachtagung_2018/Euroguidance_conference_2018_programme_english.pdf

² Plattform Erwachsenenbildung.at, Kursförderung Überblick

<https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/ueberblick.php>

³ Förderung für Fachkräfteausbildung von ZeitarbeitnehmerInnen Für ZeitarbeitnehmerInnen, die keinen Lehrabschluss haben: <https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10825>; this measure provides access to the educational leave and the qualification grant scheme for employees of labor leasing firms to acquire the apprenticeship certificate. Access is provided through the labor leasing firm, and the funds finances the difference to the support from the educational leave or qualification grant scheme and the expenses for exams etc. In 2018 250 places were available from the fund.

Förderung für Weiterbildung von ZeitarbeitnehmerInnen Für ZeitarbeitnehmerInnen, die in einem gewerblichen Zeitarbeitsunternehmen tätig sind: <https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10824>; a list of supported courses is available <https://www.swf-akue.at/index.php/weiterbildungen> (175 courses in 2018), and detailed regulations (Leistungsordnung) are available for the support, including support of in-service training and the development of a work foundation (Arbeitsstiftung) in this sector https://www.swf-akue.at/images/downloads/SWF-Leistungsordnung_2017_280618_beschlossen.pdf

Table 10: Overview about supply and support of adult education schemes (number of schemes provided at national and regional levels 2018)

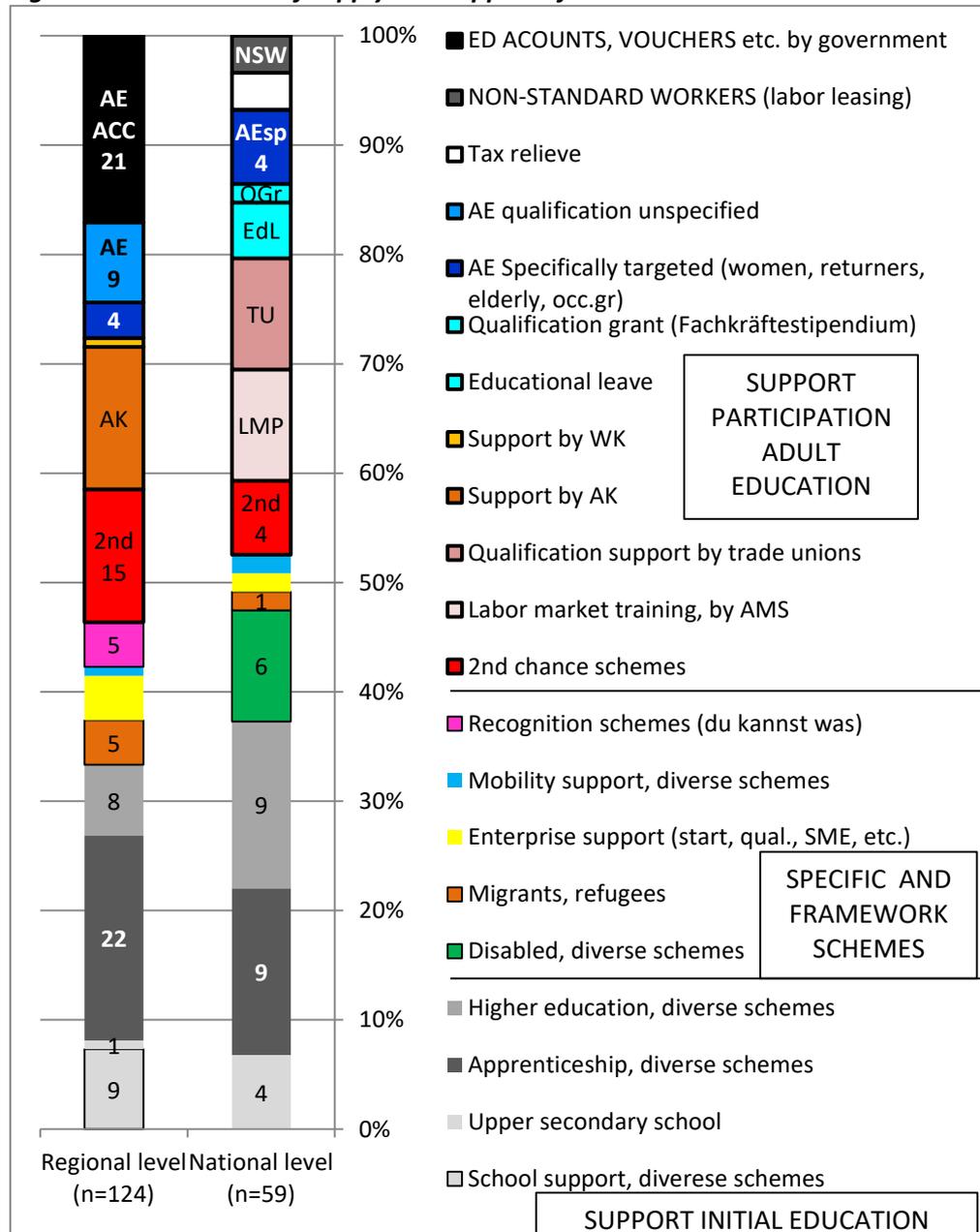
	National level*	%	Regional level	%
School support, diverse schemes**			9	7%
Upper secondary school	4	7%	1	1%
Apprenticeship, diverse schemes	9	15%	23	19%
Higher education, diverse schemes	9	15%	8	7%
Disabled, diverse schemes	6	10%		0%
Migrants, refugees	1	2%	5	4%
Enterprise support (start, qualification, SME, etc.)	1	2%	5	4%
Mobility support, diverse schemes	1	2%	1	1%
Recognition schemes (du kannst was)			5	4%
Adult education support, sum thereof	26	44%	66	54%
2nd chance schemes (incl. spec.vouchers)	4	7%	15	12%
Labor market training, by AMS	6	10%		0%
Qualification support by trade unions	6	10%		0%
Support by AK (incl. Vouchers, Bonus, spec. etc.)***			16	13%
Support by WK			1	1%
Educational leave	3	5%		0%
Qualification grant (Fachkräftestipendium)	1	2%		0%
Specifically targeted (women, returners elderly, occ.gr)	4	7%	4	3%
AE qualification unspecified			9	7%
Tax relieve	2	3%		0%
NON-STANDARD WORKERS (labor leasing)	2	3%		0%
ED ACCOUNTS, VOUCHERS etc. government****			21	17%
	59	100%	123	100%

Remarks: * mostly delivered at regional level; ** two schemes include school and higher education; *** thereof 4 schemes, returners, health, cleaning occupations; **** including 2nd chance target groups in B, K, N, O, T, W

Source: Own table based on documentation of adult education schemes

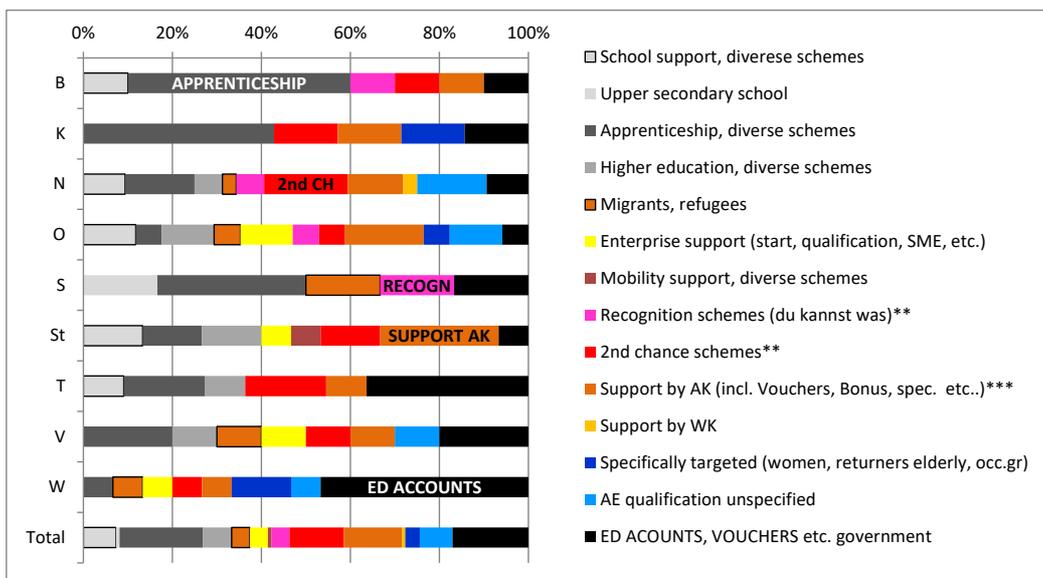
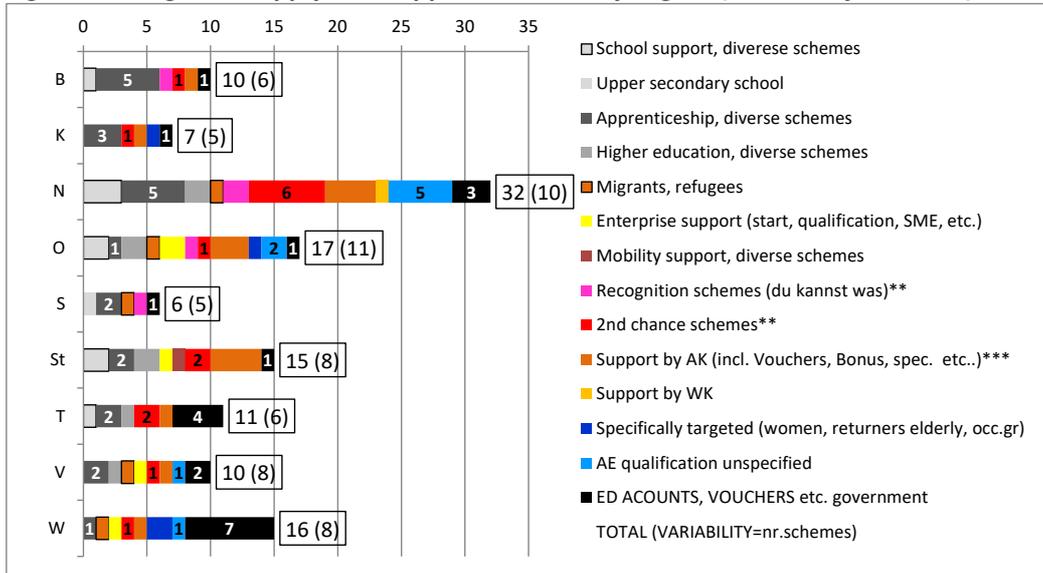
<https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/ueberblick.php>.

Figure 23: Distribution of supply and support of adult education schemes 2018



Source: : Own figure based on documentation of adult education schemes
<https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/ueberblick.php>

Figure 24: Regional supply and support schemes by region (number of schemes)



Source: Own figure based on documentation of adult education schemes
<https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/ueberblick.php>

At the regional level 6 to 32 schemes are provided (partly depending on the size of the regions), including support of initial education. Diversification by the provision of different types of schemes is between 5 and 11. Upper Austria provides a medium number of schemes (17) with the highest diversification (11). All regions provide Bildungskonto type schemes, which are in four regions diversified to different kinds of schemes (2 to 7), whereas Upper Austria has included the different types into sub-schemes. The proportion of account-type schemes among the overall number of

schemes is mostly around 10% (range 5% to 20%), with two regions with diversified schemes having a higher proportion (Tyrol and Vienna up to half). Thus, the provision of this type of schemes can be seen as an established practice in regional support of adult education. A check of correlative relationships between the number of schemes, diversification, and the proportion of account-type schemes with adult education participation and change of participation does only give some correlation with the proportion of account-type schemes; however, this correlation is mostly driven by the Vienna region where a high participation is related to a high number and proportion of account-type schemes. Neither the overall number of schemes nor the diversification is related to participation.

Eichbauer (2007) has provided an overview about account-type schemes in 2004-07. This overview has been updated for 2018-19 (see table in Annex 7.7). About 25 schemes have been identified, about half of them have been continuously provided (with more or less changes) in both periods, four have been discontinued, and eight schemes are new in 2018-19.

The majority of schemes provide support of the costs of education and training to individual participants, two schemes of the 2004-07 period provided loans, however were discontinued, and two schemes provide support for enterprises, one was discontinued from the earlier period, the other is new in the current period.

Four schemes in three regions provide income support. One more generous was discontinued; a new one provides income support for female returners without income alternative with costs of childcare (max. EURO 250 p.m.), and two continuous schemes in neighboring regions provide income support for previously stable employees that reduce or pause their employment for full-time courses with a minimum duration of one semester, income limitations are set at 3.700 gross p.m. Maximum monthly payment is 250 to 350 EURO, in case of income reduction 20% to 35% of the reduction are supported.

The majority of individual schemes follow a similar pattern to the Bildungskonto, with somehow differing parameters concerning target groups, and rates and amounts of support. Increasingly examination costs are also included in the support. The range is mostly 50% to 75% of costs, depending on target groups, maximum amounts are set in different ways (per month, per recipient, or by yearly periods up to six years), amounts of 2.000 to 3.000 EURO for around five years periods are quite common. In some cases, the support is differing due to income limits with rising support rates for lower incomes.¹

¹ Quite different versions exist, e.g. 80% till monthly gross income 1.500 EURO, 60% till 2.000, 40% till 3.000, which is also the limit in Lower Austria, or 50% till monthly net income 1.400 EURO, 50% till 1.600, 30% till 1.800, which is the limit in Vienna.

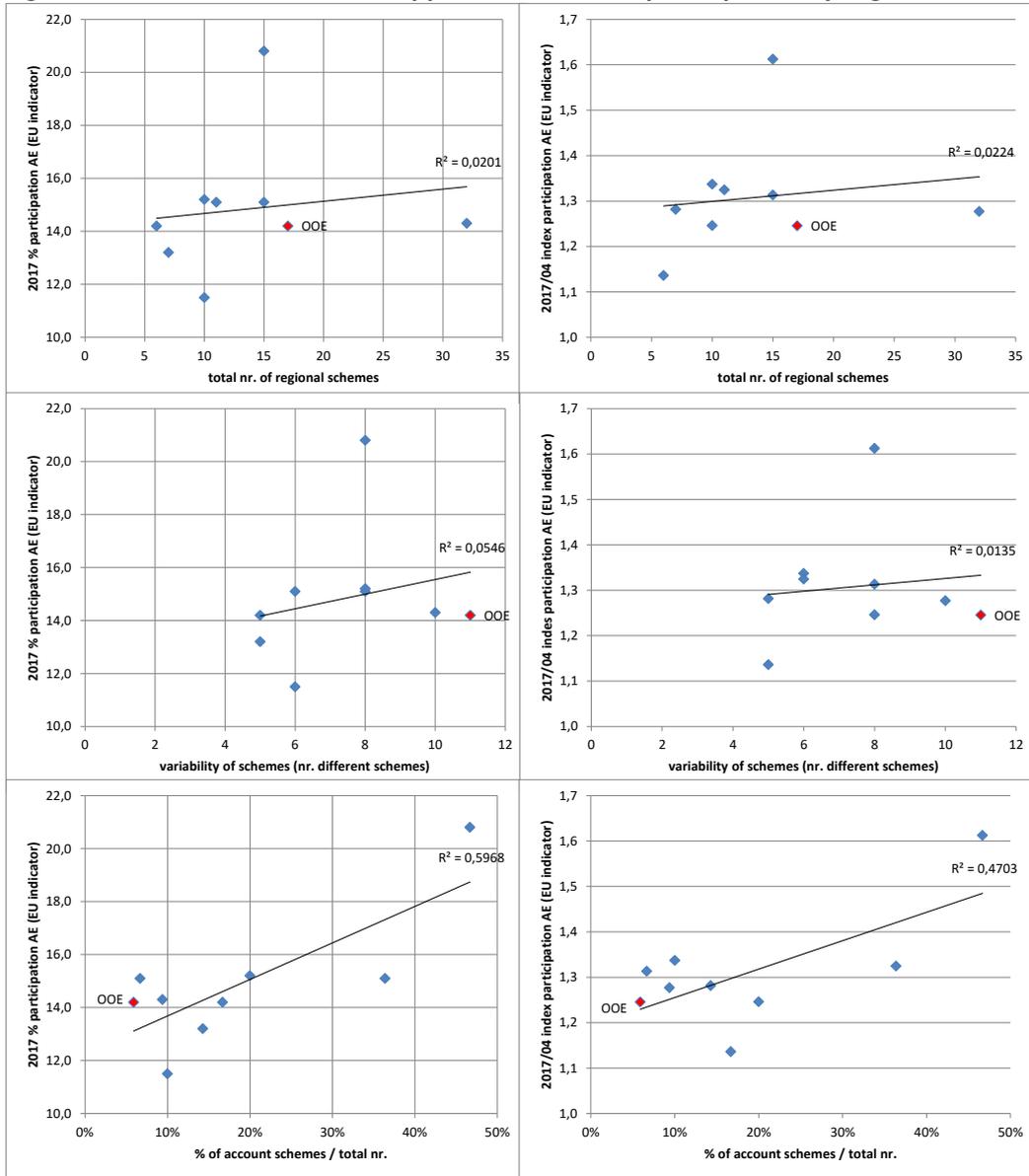
Another version is to provide a basic support rate that is topped up in case of formal exams and/or higher costs: e.g., in Tyrol 25% basic support with maximum amount EURO 500 per course topped with 15% with maximum amount of EURO 300 in case of formal exams or course costs above EURO 500. In these schemes the application can be made up to some months after the course, and payment is done after all proofs are provided (payment of fee, attendance normally 75%, credentials, etc.).

A different type of scheme exists that provides higher amounts of support (90% to 100%) for specific priority target groups, mainly persons without formal qualifications and migrants with higher native qualifications and unqualified jobs that want to have their qualifications recognized. These schemes require a mandatory counseling and the development of an education plan; the application must also be done before the course. In some schemes the recipients have to pay only 10% as a retention fee, the other 90% are paid directly by the scheme (Lower Austria), in other schemes the support can be paid in parts, and may be conditional on attendance (with the full 90% being paid in case of 75% attendance; Tyrol), in other schemes the 90% support can be topped to 100% if the formal exam is successfully passed (Vienna).

The main target groups that gain higher support rates are female returners from child care and formally unqualified persons. In the period 2004-07 categories of non-standard workers have been seldom defined as target groups (Upper Austria was pioneering, and a scheme in Vienna had specified new self-employed as target group) In the current period non-standard workers have been defined as target group in more schemes. However, these schemes are mostly mainstream ones, with application and support after completion. In case of the stronger supported schemes one-person enterprises are also eligible, however, they must be also unqualified.

In sum, to provide better opportunities for non-standard workers, they must be more specifically targeted. E.g., in the regions where the schemes are diversified, specific schemes might be constructed for these groups. The employees of labor leasing agencies are supported by their separate funds, which seems an interesting alternative, however, hardly to be generalized.

Figure 25: Correlation between support schemes and participation by regions



7 ANNEX

7.1 Interviews

7.1.1 Interview partners

Regional government (Land Oberösterreich)

Adult education <https://www.land-oberoesterreich.gv.at/469.htm>

Hofrat Mag. Günter Brandstetter, Leitung des Referats Erwachsenenbildung

Date: 26.7.2018

Social partners

AK Chamber of Labour (AK-Arbeiterkammer Oberösterreich)

<https://ooe.arbeiterkammer.at/index.html>

https://ooe.arbeiterkammer.at/ueberuns/kontakt_alt/abteilungen/Bildungsberatung.html

Mag.a Bernadette Hauer Bernadette Hauer, Leitung Abt. Bildung, Jugend und Kultur

Mag. Christian Eichbauer, Abt. Bildung, Jugend und Kultur

Date: 23.7.2018

WKO Economic Chamber (WKO Wirtschaftskammer Oberösterreich, Personal union with Employers Training Institute WIFI)

<https://www.wko.at/service/ooe/wirtschaftskammer.html>

Mag. Harald Wolfslehner, Leiter der Abteilung Bildungspolitik der WKO

Date: 18.7.2018

Training institutions

Employers' institute WIFI (Wirtschaftsförderungsinstitut, personal union with WKO):

<https://www.wifi-ooe.at/wir-uber-uns>

Mag. Harald Wolfslehner, WIFI-Geschäftsführer

Date: 18.7.2018

Employees' institute BFI and VHS (bfi Berufsförderungsinstitut, and vhs Volkshochschule Oberösterreich, personal union)

<https://www.bfi-ooe.at/de/ueber-uns.html>

<http://www.vhsooe.at/>

Dr. Christoph Jungwirth, Geschäftsführung)

Date:

Research and quality assurance

IBE Institut für Berufs- und Erwachsenenbildungsforschung an der Universität Linz

<http://www.ibe.co.at/>

<http://www.ibe.co.at/team/martina-stadlmayr.html>

Dr.in Martina Reder (before marriage: Stadlmayr), Team member, tasks (Arbeitsschwerpunkte): Qualitätssicherung in der Erwachsenenbildung, Evaluierung im Bildungsbereich und im arbeitsmarktpolitischen Kontext, Sozialforschung zu den Themen Migration, Teilhabe, Gesundheit und Arbeitsbelastungen

Date: 18.7.2018

7.1.2 Main messages from the interviews

Regional government (Land Oberösterreich)

- The relations between the chamber of labor and the administrators of the scheme have, in my opinion, improved and not deteriorated. In the beginning the Bildungskonto was administered by a department of a councilor of the social democrats. Because of this, the members of the chamber of labor have had a very good relationship to this department. So, the people who worked on the scheme had a constant exchange about things that were going good or wrong. In this form of corporation, the scheme got improved continuously. Generally, this relationship has cooled down after the department was taken over by another political party (the conservative party; annotation). On an administrative level the contacts continued to exist and still exist today. So, if there is a special case or people dealing with especially hard circumstances, we still cooperate closely with the chamber of labor. And I would estimate that in 98% of those cases, we are able to find a satisfying solution. There is also a certain regulation that allows some leeway in such cases.
- I'm surprised by the fact that we only get 16.000 to 17.000 applications per year. I think it should be much more. We have about 1 million course participants per year. Let's say 20% of these participants are in employment and are doing the course as training for their job. This would amount to about 200.000 course participations that would be eligible to a subsidy – the real amount of applications is less than a tenth of that figure. I can't tell you if those people don't know about the scheme, if they don't want to apply or if they just simply forget about it. So, I think the numbers should be higher, especially when considering that there is a broad range of vocational qualifications that are eligible for funding.

- In other states (for example Lower Austria) the applications for the scheme can only be submitted via Internet. I have always fought against this development, because I think that certain groups, especially those with low formal qualifications, could be even less likely to apply for a subsidy. So, in the Upper Austrian system it is possible to apply via internet, which about 25% of the applicants do, and additionally via the paper form.
- 10 years ago, the funding granted by the Bildungskonto was roughly two to three million Euros above the allocated budget. This resulted in long waiting periods for the subsidies – about four to five months. After the Rechnungshof (audit court) pointed this out, the budget was increased and waiting time dropped. Now the maximal waiting time for the subsidy is about six weeks.
- Because of cuts in the budget of the Bildungskonto we had to decide if we were going to further restrict access of certain groups or to lower the subsidy rate. We decided to go with lower rates rather than fewer eligible groups.

Regional Chamber of Labor AK

- Non-standard workers are members of the chamber of labor. Insofar they are able to use the Bildungskonto.
- Official relations to the administration of the scheme worsened after the responsibility for the Bildungskonto was taken over by the conservative party.
- Innovative Bildungskonto: Low quality of projects killed this special part of the Bildungskonto.
- Strengths: Disadvantaged groups are able to get subsidies relatively easy and un-bureaucratically. A lot of courses can be subsidized via the scheme, which makes it appealing to a broad audience.
- Weaknesses: Some courses are pretty expensive (up to 4.000 Euros). For some people those amounts are hard or impossible to pay up front. It is also possible that the institutions offering the courses are factoring in the subsidies from the Bildungskonto and are increasing their prices as a result.

Employers training institute WIFI and Regional Economic Chamber WKO

- Lifelong learning needs political commitment and monetary incentives to make education affordable for the people.
- Because the „Bildungskonto“ is constructed as a demand-side subsidy, we as a supplier do not know if and how many of our customers are applying for the subsidy[...] Of course we are promoting the instrument on homepage, in our folders and so on. There we give examples of the various instruments that people can use to get subsidies for our courses. [...] We actually don't know if our customers use these subsidies. To get money from the Bildungskonto you have to prove that you did participate in a course – but not to us. We try to give as much information as possible, but we don't know if this information is being used.
- Over the course of time small entrepreneurs with up to five employees became eligible to apply for a subsidy of the „Bildungskonto“. Initially it was only open for sole proprietors. Particular groups of disadvantaged people, for example people with no more than compulsory schooling, also got eligible shortly after the initiation of this instrument.
- Currently the „Bildungskonto“ is an initiative of and funded by the individual states. I would like to see more commitment from the federal agencies and politicians. In general, there are many debates about lifelong learning on the federal level, but not as much action as I would wish for.

Employees' training institutes Berufsförderungsinstitut BFI and Volkshochschule VHS

- VHS & BFI: A very important part of the courses that can be subsidized by the Bildungskonto are German language classes. Participants in those courses tend to be economically disadvantaged. That's why we have one lesson, usually at the end of the course, where participants are filling out the application forms for the Bildungskonto and sign an assignment notice („Abtretungserklärung“). The participants then only have to pay the difference between the course costs and the subsidies. Those applications are put into one list and are submitted to the administration of the scheme. We do this for all the available subsidies, so that the participants only have to pay their actual contribution. In very few cases this procedure is being exploited, for example from people with a primary residence elsewhere. In those cases, we are sending a debt collecting agency, if the person is not heavily disadvantaged. There is also the possibility to pay the remaining costs via installment payments.

- There is one problem we have identified but somehow couldn't manage to solve it entirely: there is a pretty large market for expensive but essentially useless qualifications in the health/esoteric sector. Legally they are not classified as professional qualifications. We came to the agreement that those qualifications have to be confirmed by the employers of the course participants.
- I think the innovative Bildungskonto was a good idea, but this special scheme publicly sponsored a lot of non-marketable educational products. The money would have been put to better use if it were allocated in the main budget.
- Weakness of the scheme: the minimal percentage of the subsidy (30%) is to be considered as a lower bound. If it goes beneath that, fewer people will be applying for it. There is probably also a considerable amount of deadweight effects, but this is very hard to control and deal with.
- Strength of the scheme: If you apply for a subsidy, it's very likely it will be granted. Other subsidies, for example from the Austrian Integration Fund or the labor market service, are way more uncertain.

7.2 Employment regulations and protection

7.2.1 Overview of forms of work (main criteria and demarcations of quite detailed regulations)¹

Standard employment ²	Part-time employment ³	Fixed-term employment ⁴	Marginal employment (ME) ⁵	Freelance service contract ⁶	New self-employed ⁷	Traditional self-employed ⁸	One-person-enterprises ⁹	Labor leasing/ temporary employment ¹⁰	Digital form of work
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¹ Basically legal and collective bargaining regulations apply, so legal regulations can be in many cases modified by collective agreements; an important aspect of jurisdiction is that the forms of work and employment are not assessed by the wording of contracts in cases of conflict, but substantially by comparison to the legal provisions (e.g., freelance service contracts must not be treated in practice as employees, or successive fixed-term contracts (Kettenverträge) are legally transformed into standard employment, if clear purposes cannot be named; see condensed description by BMASGK, a main element is personal dependency of employees (persönliche Abhängigkeit) and discretionary power/managerial authority of employers (Weisungsbefugnis):

<https://www.migration.gv.at/de/leben-und-arbeiten-in-oesterreich/arbeiten/beschaefigungsformen/> “Die im Vertrag gewählte Beschäftigungsform muss aber der tatsächlichen Beschäftigung entsprechen: so liegt z.B. ein freier Dienstvertrag nicht vor, wenn die Tätigkeit in persönlicher Abhängigkeit verrichtet wird, also der/die Beschäftigte weisungsgebunden ist, Vorgaben in Bezug auf Arbeitszeit und Arbeitsort einhalten muss usw. In diesem Fall liegt ein Arbeitsvertrag vor, auch wenn der Vertrag als freier Dienstvertrag bezeichnet wird.“

² See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070002.html>

³ See the employees chamber information: https://wien.arbeiterkammer.at/service/broschueren/Arbeitsrecht/Teilzeitarbeit_2018.pdf; the employers chamber information: https://www.wko.at/service/arbeitsrecht-sozialrecht/Teilzeitbeschaeftigung_-_Entlohnung.html; https://www.wko.at/service/arbeitsrecht-sozialrecht/Teilzeitbeschaeftigung_-_Mehrarbeit.html

⁴ Fixed-term employment is applied in the context of short-term labor migration, with specific regulations <https://www.migration.gv.at/de/formen-der-zuwanderung/befristete-beschaefigung/>; otherwise restrictions exist for fixed-term employment, in particular successive fixed-term contracts are prohibited without accepted purposes (e.g., seasonal employment, substitution of a certain employee, or purposes of training or screening after probation period)

⁵ See definitions and regulations: <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070006.html>

⁶ See definitions and regulations: <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070005.html>; https://wien.arbeiterkammer.at/beratung/arbeitsrecht/arbeitsvertraege/Freier_Dienstvertrag.html

⁷ See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070007.html>

⁸ See: <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070009.html>; specific regulations exist about the leading management personnel; small enterprises (i.e. one-person enterprises) are to some extent specifically treated

⁹ See <https://www.wko.at/service/netzwerke/epu-factsheet.pdf>; http://wko.at/statistik/EPU/EFGmbH_Bld.pdf

¹⁰ See <http://personaldienstleister.or.at/zeitarbeitskraefte/rechtliches/das-aueg-im-ueberblick/> Arbeitskräfteüberlassungsgesetz amendment 2013

Social security, Compulsory insurance	Full protection if pay over Geringfügigkeit (GF); ¹ employers must notify employers and employees pay compulsory contributions	Regulation of standard employment applies, also GF ² Discrimination prohibited, firm level benefits, including further education/training must be provided also	Regulation of standard employment applies, also GF In particular, lay-off before end of contract is strongly restricted	Only accident insurance, employers must notify, if more than one MEs, and wage above GF, compulsory insurance applies	Full protection if pay over Geringfügigkeit (GF) must notify employers and employees pay compulsory contributions	Must notify if yearly gross income above 5.256,60 EURO (2018=GF*12)	Need a trade certificate, compulsory social security if turnover over 30.000 EURO and profit over GF, separate institution	Enterprises without employees, organized separately in employers chamber, 60% of all enterprises, insurance basically same as other enterprises	Legislation for leasing firms, basically regulation of standard employment applies, leased personnel must be treated the same as permanent staff	So far big open topic...
-Health	Yes	Yes	Yes	(cond.)	Yes	(cond.)	Yes (cond.)	Yes (cond.)	Yes	
-Pension	Yes	Yes	Yes	(cond.)	Yes	(cond.)	Yes (cond.)	Yes (cond.)	Yes	
-Accident	Yes	Yes	Yes	Yes	Yes	(cond.)	Yes (cond.)	Yes (cond.)	Yes	
-Unemployment	Yes	Yes	Yes	Yes	Yes	voluntary	voluntary	voluntary	Yes	
-Insolvency ³	Yes	yes	Yes	Yes	Yes					
Legal protection, entitlements by labor laws	Full	Full	Full	Basically same as full employees, some depend on collective agreements	Not full only apply in case of written agreement					
	Collective wage Vacation	Collective wage Vacation	Collective wage Vacation							

¹ Geringfügigkeit is a main element of employment regulation, it is given by a yearly adapted monthly income threshold (2018: 438,05 EURO; 2017: 425,70 EURO; before a day rate was also defined, 2016: 415, 72 EURO monthly, 31,92 EURO daily) that applies to most forms of employment: mostly an income over GF entitles for full social security; below Geringfügigkeit only insurance for accidents is compulsory, other social security elements are voluntary on the side of the employee

² Overtime is specifically regulated for part-time employees, hours between part-time agreement and legal working time is a special category (Mehrstunden, different from Überstunden), can be remunerated by pay or time (Zeitausgleich), the premium is smaller for these hours, normal overwork starts above legal working time (specific regulations are possible)

³ Employers pay as addition to contribution to unemployment insurance, see <https://www.insolvenzentgelt.at/ueber-uns/der-fonds>;

	Special payment ¹ Sick pay Severance pay	Special payment Sick pay Severance pay	Special payment Sick pay Severance pay		Yes Firm based yes				
Dismissal protection	Notice periods, cond.notification	Notice periods, cond.notification	Strong before end date						Shorter notice periods
Membership	Employees chamber (AK)	Employees chamber (AK)	Employees chamber (AK)		Employees chamber (AK)	Employers chamber	Employers chamber	Employers chamber	
Taxing	Employer delivers tax	Employer delivers tax	Employer delivers tax		Same as self-employed, below 11.000 EURO per year no tax ²	Have to apply for tax account, and declare income, below 11.000 EURO per year no tax	Have to apply for tax account, and declare income, below 11.000 EURO per year no tax		
Legal base	ASVG, EStG 1988, several additional laws ³	ASVG, EStG 1988, several additional laws	ASVG, EStG 1988, several additional laws	ASVG, EStG 1988, several additional laws	ABGB, EStG 1988	ABGB (Werkvertrag), GSVG, EStG 1988	ABGB (Werkvertrag), GSVG, EStG 1988	No specific law, conditional regulations	AÜG 2013 amendment

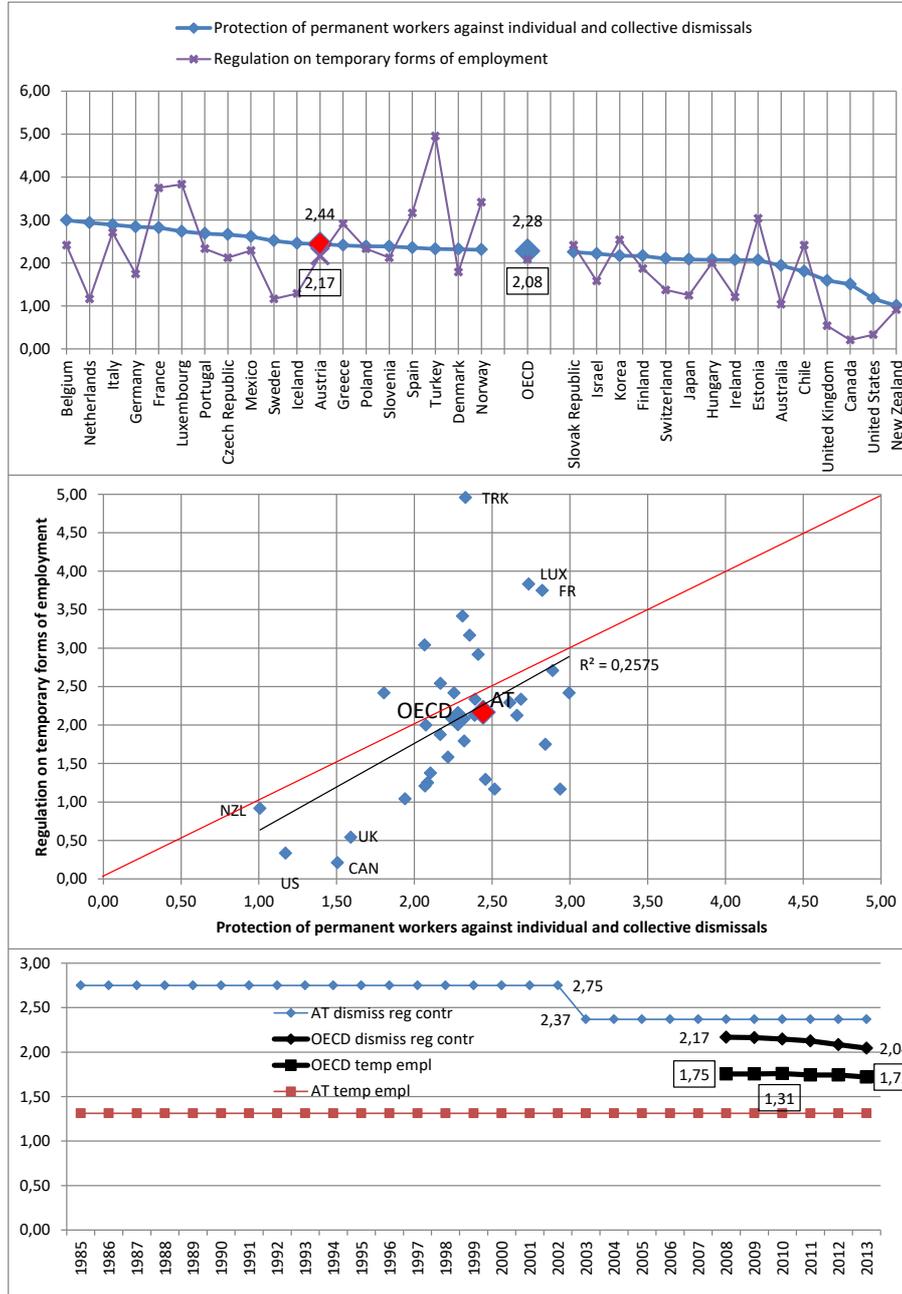
¹ Sonderzahlungen, e.g. in Austria 14 wages/year are paid, with better tax conditions for the 13th and 14th wage

² If other employment also or pension, this limit is 12.000 EURO.

³ Angestelltengesetz, Urlaubsrecht, Arbeitszeitgesetz (i.e. overtime), Arbeitsruhegesetz, Entgeltfortzahlung, Arbeitslosenversicherungsgesetz, etc.

7.2.2 OECD indicators employment protection

Figure 26: Austria on selected OECD Employment protection indicators



Source: Own calculation and figure based on OECD EPL, <http://www.oecd.org/employment/emp/EPL-data.xlsx> and <http://www.oecd.org/employment/emp/EPL-timeseries.xlsx>

Explanation: Variables in upper and middle panel: eprc_v3, ept_v3, current indicators; variables in lower panel eprc_v1, ept_v1, more simple indicators, but longer time series; Austrian position slightly different according to indicators used

These questions are translated in to the Austrian context by two kinds of analysis. First, a closer look on the regulations and the phenomenology of non-standard work is necessary, to understand, which categories of these kinds of precarious or disadvantaged work are in fact present in Austria? Another question concerns how the above definitions of new, non-standard forms of work are reflected in the discourses and definitions of target groups of lifelong learning policies in Austria.

7.2.3 Forms of non-standard work in Austria

Work is regulated in Austria by a quite complex legal basis; the indicators of employment protection show a similar level to the OECD average, over time dismissal protection was slightly reduced, protection of temporary employment is indicated stable over time, different indicators show slightly different positions around the OECD average (see ANNEX).¹ In any case employment protection is neither exceptionally high nor exceptionally low in Austria despite the employees organizations have put high emphasis on this topic. Under the recent government, these issues are highly contested, and politics try to reduce the real and statutory influence of the social partners, in particular of the employees' side. A particular topic has been the protection of new forms of non-standard work.

The Upper Austrian Chamber of Labor presents its policy towards non-standard employment as follows.² The *definition of non-standard* is every form of work outside a traditional standard employment relation (full-time open-ended employment contract: 'unbefristete Vollzeit'). The specific categories of non-standard work, explicitly addressed by policies are the following

- part-time (Teilzeit)
- marginal employment (geringfügige Beschäftigung)³
- labor leasing/temporary employment (Arbeitskräfteüberlassung, Leih- und Zeitarbeit)
- fixed-term employment (Befristungen)

¹ Eurofound (18.10.2017) Living and working in Austria <https://www.eurofound.europa.eu/country/austria>;
<https://www.eurofound.europa.eu/sites/default/files/wpef18019.pdf>; OECD (2018) OECD Indicators of Employment Protection <http://www.oecd.org/els/emp/oecdindicatorsofemploymentprotection.htm>; AK-OOE (2018) Beratung: Arbeit & Recht > Arbeitsvertrag <https://ooe.arbeiterkammer.at/beratung/arbeitsrecht/Arbeitsvertrag/index.html>

² AK-OOE (19.02.2016) A-typische und prekäre Arbeitsverhältnisse.
https://ooe.arbeiterkammer.at/interessenvertretung/arbeitswelt/arbeitsmarktpolitik/A-typisch_und_prekaer.html; see also the basic definitions and regulations of employees (Arbeitnehmer):
<https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070002.html>

³ See definitions and regulations: <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070006.html>

- freelance service contract (freie Dienstverträge, freie Dienstnehmer)¹
- new self-employed („neue Selbständige“, nur zum Schein abgeschlossene Werkverträge)²
- digital form of work (digitale Arbeitsformen, „crowdwork“).

At national level we can find some more categories in a somewhat different presentation³

- trade regulated contract for work and services (Werkvertrag mit Gewerbeberechtigung)⁴
- One-person-enterprises (EPU Ein-Personen-Unternehmen (enterprises without employees)⁵
- in addition, a number of very specific forms of employment exist that have specific regulations: apprentices (Lehrlinge),⁶ seasonal foreign workers (Saisoniers),⁷ service cheque for work in private households (Dienstleistungsscheck – Arbeitsverhältnisse in privaten Haushalten),⁸ and certain foreign care-workers in private households (Pflegerkräfte aus Kroatien in privaten Haushalten).⁹

Non-standard work is not automatically considered precarious work, main criteria are the income, the protection by social security, and the risk of unemployment and feeling of insecurity. See

Empirically, non-standard work is often related to low income jobs, and the working poor are an overrepresented category among people at risk of poverty in Austria.¹⁰

¹ See definitions and regulations: <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070005.html>

² See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070007.html>

³ Presentation of forms of work in Austria, with emphasis on the legal and social security regulations:

<https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070000.html>;

<https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070001.html>

⁴ This is the traditional form behind the New Self-employed, embedded into the economic chambers, needing a trade permission (Gewerbeberechtigung), see:

<https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070009.html>

⁵ See <https://www.wko.at/service/netzwerke/epu-factsheet.pdf>; http://wko.at/statistik/EPU/EFGmbH_Bld.pdf

⁶ See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070340.html>

⁷ See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070008.html>

⁸ See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070070.html>

⁹ See <https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070010.html>

¹⁰ Csoka, Bettina (07.06.2017) 10 Euro sind das Mindeste! <http://blog.arbeit-wirtschaft.at/10-euro-sind-das-mindeste/>

This basic structure is reflected in the discourse and target groups of adult education policies, giving no or marginal emphasis to the dimension of non-standard work.

7.2.4 Target groups in lifelong learning policies

Currently lifelong learning policies in Austria and Upper Austria are in a situation of disruption, maybe in line with the political changes towards right wing populism. There have been attempts towards strategies in the 2000s, with the publication of comprehensive strategies around 2010. However, these strategies are not even available in the public domain of the education ministry or the regional government at the moment.¹

Programs and strategies from the 2000s

Lifelong learning policy was conceived as a broad topic, comprising the whole of the educational structure from early education to education provisions of the elderly after leaving employment. Within this wide space, adult education was addressed through seven lines of action (Aktionslinien) in the **national strategy 2011**.²

- Second chance to acquire basic qualifications and competences
- Alternative transition into employment for young people
- New orientation and work-life balance
- Community education

¹ The regional government announces the strategy at its adult education page (<https://www.land-oberoesterreich.gv.at/469.htm>: LLL - Lebensbegleitendes Lernen, Strategiepapier Oberösterreich - Impulse & Ziele für Erwachsenenbildung <https://www.land-oberoesterreich.gv.at/100626.htm>), however, a document is not attached. At another adult education information site the Upper Austrian strategy is briefly described, however, the attached document is not available anymore (https://erwachsenenbildung.at/aktuell/nachrichten_details.php?nid=6885 > link document: https://www.land-oberoesterreich.gv.at/files/publikationen/bgd_III.pdf)

The central government has published a lifelong learning strategy in 2011 (Republik Österreich 2011), signed by four ministers (https://erwachsenenbildung.at/aktuell/nachrichten_details.php?nid=4747; https://erwachsenenbildung.at/themen/lebenslanges_lernen/oesterreichische_strategie/aktuell.php;), however, the link to the document is broken, and the strategy document cannot be found at the current webpage of the ministry, whereas many older documents to the topic are available (The strategy document can be found at another webpage: <https://www.qualifikationsregister.at/res/file/Strategie1.pdf>, or: <http://pubshop.bmbf.gv.at/detail.aspx?id=442>). The current government's program does not mention adult education as a focus.

² Aktionslinie 3 Kostenloses Nachholen von grundlegenden Abschlüssen und Sicherstellung der Grundkompetenzen im Erwachsenenalter

Aktionslinie 4 Ausbau von alternativen Übergangssystemen ins Berufsleben für Jugendliche

Aktionslinie 5 Maßnahmen zur besseren Neuorientierung in Bildung und Beruf und Berücksichtigung von Work-Life-Balance

Aktionslinie 6 Verstärkung von „Community-Education“-Ansätzen mittels kommunaler Einrichtungen und in der organisierten Zivilgesellschaft

Aktionslinie 7 Förderung lernfreundlicher Arbeitsumgebungen

Aktionslinie 8 Weiterbildung zur Sicherung der Beschäftigungs- und Wettbewerbsfähigkeit

Aktionslinie 9 Bereicherung der Lebensqualität durch Bildung in der nachberuflichen Lebensphase

- Learning-friendly work environments
- Further education for employability and competitiveness
- Quality of life after employment

This strategy is rather organized by institutional sectors, and does address specific target groups only partly by the specific action lines:

- Unqualified persons, meaning mainly persons without completion of the first fundamental compulsory education certificate (Hauptschulabschluss)
- Persons lacking basic competences, meaning mainly literacy and numeracy, and focusing on non-German speaking migrants
- Young unemployed or NEETs without or with formal qualifications
- (female) returners to employment from family work
- (female) out-of-labor-force persons seeking (more) employment

The non-standard or precarious employment categories are not directly and deliberately addressed as focused target groups. The broader adult education action lines were rather oriented to issues of overall financing and governance, than towards specific groups. In terms of disadvantage rather the education and qualification dimension has been emphasized than the employment dimension. ‚*Bildungsferne*‘ (persons remote from education) are a much more focused target group than the precariously or non-standard employed.

In **Upper Austria**, two main focuses in adult education policy can be identified, one being a general increase of support of adult education – in particular among the medium level qualified (‘*Fachkräfte*’) – to improve overall lifelong learning participation, the other also being the people without or with low (formal) qualifications (*Niedrigqualifizierte, Bildungsferne*).

A big project has been run in the mid-2000s to identify this target group empirically, and to clarify the behavior, conditions, and environments concerning their access to education (Mörth et al. 2005); the report is still on the adult education page of the regional government. The report includes a plenty of information about this target group, based on multi-method design (expert interviews about conditions and policies, quantitative analysis of secondary data from central and regional level, and additional surveys among the target group with and without educational participation):

- More specific identification and quantification of the target group
- Participation in education during last year and periods before by the target group, quantitative amount and qualitative structures
- Demographic and ascriptive Characteristics of the target group, comparison of participants and non-participants

- Behavioral characteristics of the target group

The report includes a set of policy-proposals to support the target group.

Interestingly the employment status in general and non-standard employment is covered only very little by this report, mainly the distinction of part-time and full-time employment is made, to some extent are employment statuses covered (e.g., self-employed). Two findings stand out: first, part-time employment is significantly related to low educational status (Mörth et al. 2005, p.47), second, the part-time-full-time-distinction is *not* significantly related to participation in AE in the Upper Austrian population (Mörth et al. 2005, p.59).

Most categories of new non-standard employment do not occur at all in the report, thus it can be seen as a mirror of the perception of problems and challenges in adult education policy at this time. This is underlined by the perceptions/citations reported from the expert interviews of persons from the field that also do not mention this dimension. To some extent this neglect might also be influenced by the use of the official statistical material for secondary analysis that – at least in this period – did not include the necessary categorical distinctions.

The Upper Austrian Strategy¹ has responded to some of the proposals in the report. Initiatives in the early 2010s were

- Improvement of easy access to literacy, numeracy, e-literacy by supporting also participation in other regions, and by providing ‘mini courses’,² small easily accessible programs in the immediate neighborhoods
- Provision of e-material for supporting literacy by the public libraries (Media2go-Digitale Bibliothek OÖ)³
- Every year a specific topic should be supported, 2013/14 the topic was learning democracy
- The AE provider institutions should cooperate in networks, not only at the political level, but also at the level of provision⁴

¹ Synopsis at https://erwachsenenbildung.at/aktuell/nachrichten_details.php?nid=6885

² Presentation VHS https://files.adulteducation.at/uploads/brigitte_e/Minikurs_VHS_OO.pdf; WIFI webpage announcement <https://www.wifi-ooe.at/minikurse> (no concrete provisions visible)

³ Announcement at library page <http://www.media2go.at/media2go/frontend/welcome,51-0-0-100-0-0-1-0-0-0-0.html>

⁴ A set of providers have built up a network since 1993: EB-Forum (<http://www.weiterbilden.at/index.php/eb-forum>), however, practical cooperation does not seem to be brought forward very much; the interviews with providers have reflected a common understanding as well as a competitive positioning. The EB-Forum own a web-platform, where the certified providers can – for a fee – publish their information about courses etc.

<http://www.weiterbilden.at/index.php/impressum>

Current focus of adult education policy

Education policy undergoes some disruptive change currently. The new government’s program has announced quite strong changes in policy direction, and new reform of most recent reforms. AE is not mentioned as a special field of action in this program; however, the previous attempts of the lifelong learning strategy seem to phase out (the ministers that have signed the strategy are not in office any more).

Some main programs/activities are continued:

- Second chance program (Initiative EB-Erwachsenenbildung),¹ a complex program funding courses for young people to acquire the certificate of compulsory education (Hauptschulabschluss) and literacy/numeracy courses mainly for migrants
- Continuation of ESF supported policies,² one priority axis is investment in education (Prioritätsachse 3: Investitionen in Bildung, Ausbildung und Berufsbildung für Kompetenzen und lebenslanges Lernen), with two main goals: reduction of early school leaving, support of equal access to lifelong learning
- Validation strategy,³ this was already one action line in the lifelong learning strategy, and includes a comprehensive approach towards validation of non-formal and (later) informal competences

A new political focus has emerged with digitalization and industry 4.0. Here a main charge of a cooperatively developed policy proposal by social partners and industry (Verein Industrie 4.0 Österreich 2017) is

- The Development of a new strategy for further education (Entwicklung einer Weiterbildungsstrategie),⁴ this might somehow follow/transform the lifelong learning strategy

Non-standard employment has also emerged as a policy topic, however, not many concrete actions can be observed:

¹ Short description in English: https://www.initiative-erwachsenenbildung.at/fileadmin/docs/Austrian_Initiative_for_Adult_Education_2016.pdf; see also more information <https://www.initiative-erwachsenenbildung.at/initiative-erwachsenenbildung/was-ist-das>

² https://erwachsenenbildung.at/service/foerderungen/eu_foerderungen/europaeischer_sozialfonds.php; overview 2014-2020 https://erwachsenenbildung.at/service/foerderungen/eu_foerderungen/europaeischer_sozialfonds.php#2014-2020; calls for projects include the topics of projects (youth, women) in the Initiative EB above, professionalization, development of counselling

³ Basic info about validation strategy https://erwachsenenbildung.at/aktuell/nachrichten_details.php?nid=12402

⁴ https://plattformindustrie40.at/wp-content/uploads/2016/03/WEB_Industrie4.0_Ergebnispapier-Qualifikation-und-Kompetenzen.pdf

- One is a funds for the support of further education of employees in labor leasing/temporary employment financed by the employers of this branch and the central government (Sozial- und Weiterbildungsfonds der Arbeitskräfteüberlassung Österreichs)¹

7.2.5 Occurrences of non-standard employment categories (“beschäftig...”, “selbständig”) in Mörth et al. 2005

Overall occurrence 53 times; referring to employment categories of target group are the following citations; marginal employment (geringfügig) is mentioned 3 times in the whole report (see below highlighted), the self-employed are occurring in the text 12 times, often in tables and mostly in relation to agriculture (see citations below), however, without mentioning the ‘new self-employed’ at all; the other non-standard categories also do not occur at all in the report.

Occurrence of “beschäftig...”

p.47 Teilzeitbeschäftigte Erwerbstätige gehören der Zielgruppe signifikant eher an, aber auch Arbeitslose lassen sich im Gegensatz zu nicht arbeitslosen Erwerbspersonen öfter unter den Niedrigqualifizierten finden

p.52 Grundsätzlich kann die Aussage gemacht werden, dass erwerbstätige Menschen signifikant seltener den Niedrigqualifizierten angehören³⁶. Betrachtet man sie aber in einer genaueren Analyse, so fällt auf, dass teilzeitbeschäftigte Personen dennoch eher der Zielgruppe zuzuordnen sind.

p.52 Zum Zeitpunkt der Befragung gingen im gesamten Bundesland 21,2% einer Teilzeitbeschäftigung nach. Unter den Niedrigqualifizierten jedoch waren es jedoch 29,1%. Der Anteil der niedrig qualifizierten Teilzeitbeschäftigten ist demnach um 7,9% höher. Im Vergleich dazu sind 70,9% der Zielgruppe Vollbeschäftigte, während unter allen Erwerbstätigen der Anteil jedoch 78,8% beträgt.

p.52 Ähnlich der Gruppe der ausschließlich haushaltsführenden Personen ergibt sich der höhere Anteil der Teilzeitbeschäftigten sicherlich auch durch die dort höhere Frauenquote.

¹ See basic information <http://personaldienstleister.or.at/zeitarbeitskraefte/sozial-und-weiterbildungsfonds/>: the fund is legally based, (Amendment to Arbeitskräfteüberlassungsgesetz, § 22a AÜG), 2013 founded. The employers pay 2014 0,35% of gross wages of blue-collar workers, in 2015 0,6%, 2016 auf 0,8%, from 2017 in addition for white collar workers 0,8%. Unions and employers manage and the labor ministry oversees the fund. Before the support of further education was regulated by collective agreements.

More information about implementation etc. <https://www.swf-akue.at/>: Ca. 120.000 leasing employees can be supported, the volume of the funds is € 13,3 Mio., 22.000 employees were supported 2014–2016.

p.52 Ausgehend von allen erwerbstätigen Niedrigqualifizierten in Oberösterreich kann der absolute Wert von 29.480 niedrig qualifizierten Teilzeitbeschäftigten ermittelt werden.

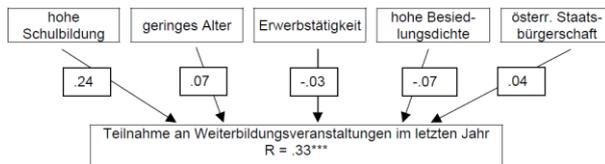
p.55 Gut ein Drittel der Beschäftigten in unserem Bundesland zählen andererseits zur Gruppe der Angestellten. Unter den Niedrigqualifizierten sind jedoch nur 15,6% zu finden. Angestellte sind somit deutlich unterrepräsentiert, was unter anderem auch für Beamte und Selbständige im Handel, Gewerbe, Industrie und Fremdenverkehr gilt.

- Signifikant eher niedrig qualifiziert sind
- Frauen
 - Ältere
 - Menschen aus ländlichen Regionen
 - **teilzeitbeschäftigte** Erwerbstätige
 - Arbeitslose
 - Nicht-Erwerbstätige (PensionistInnen)
 - aus dem Ausland stammende Personen

p.52

p.58/59 model explaining AE participation

Abbildung 16: Einflussfaktoren auf Teilnahme an Weiterbildung in Oberösterreich



R multipler Korrelationskoeffizient (** = 100% signifikant)

Als nicht signifikant erwiesen sich in diesem Modell das Geschlecht und die Art der Anstellung, also Vollzeit- oder Teilzeitbeschäftigung.

p.63 Besonders zu erwähnen sind jedoch die tatsächlich erwerbstätigen Personen, also jene, die zum Befragungszeitpunkt einer Beschäftigung nachgegangen sind. 18,8% aller erwerbstätigen Niedrigqualifizierten waren in den letzten 12 Monaten in der Weiterbildung aktiv, was weitaus höher als der Durchschnitt ist. Erwerbstätige fallen somit besonders häufig in die Gruppe der Bildungsteilnehmer.

p.71 Für immerhin 24,3% war die Sicherung der Beschäftigung ein mit auslösendes Motiv, sich beruflich fortzubilden. Als weitere Beweggründe sind die Verbesserung der Aufstiegsmöglichkeiten (21,3%), veraltete Kenntnisse (19,1%) und auch eine neue Tätigkeit im Betrieb (18,0%) zu nennen. Nur für 3,4% der Befragten waren hauptsächlich private Zwecke für den berufsbezogenen Kursbesuch ausschlaggebend.

p.146/147 footnote 214 Durch das öö. Bildungskonto werden auf Antrag Personen gefördert, die in einem Arbeitsverhältnis stehen oder Arbeitslosengeld bzw.

Notstandshilfe beziehen, die in Oberösterreich arbeiten oder deren Hauptwohnsitz seit mindestens einem Jahr in Oberösterreich liegt, und die als höchste Qualifikation den Abschluss einer Matura, einer AHS oder BHS aufweisen (dazu auch Personen in Karenz, Ein-Mensch-Unternehmen, **geringfügig Beschäftigte**, über 40-Jährige). Gefördert werden Kurs- und Nebenkosten, wenn die Weiterbildung einer berufsorientierten Weiterbildung oder Umschulung dient, wenn die Bildungseinrichtung des Qualitätssiegel des EB-Forums OÖ. (oder eine vergleichbare Zertifizierung) hat, und wenn 75% der Maßnahme bereits absolviert wurde. Die Höhe der Förderung deckt 50% aller Bildungskosten und ist allgemein dzt. mit max. EUR 730,- begrenzt. In besonderen Fällen („spezielles Bildungskonto“ für Werkmeister- und Fachakademie-Abschlüsse etc.) beträgt die Fördergrenze das Doppelte (EUR 1460,-).

Was begünstigt die Bildungsbereitschaft?

- 1) Persönliche Weiterentwicklung als Ziel (0,31)
- 2) Gefühl, nicht zu alt für Bildung zu sein (0,30)
- 3) Inanspruchnahme von Beratungsangeb. (0,29)
- 4) Verbesserung der Arbeitsmarktchancen (0,29)
- 5) Pflege d. kollegialen Wissensaustauschs (0,28)
- 6) Notwendigkeit beruflicher Umschulung (0,26)
- 7) Kenntnis von Fördermöglichkeiten (0,25)
- 8) **Beschäftigung** m. neuen Themen als Ziel (0,25)
- 9) Sicherung e. bestehenden Arbeitsplatzes (0,24)
- 10) bisherige Teilnahme an Weiterbildung (0,22)

Korrelationskoeffizienten

p.168

p.179/180 [proposal] Besondere Berufssituationen (Schichtarbeit, **Geringfügigkeit**) berücksichtigen. Niedrigqualifizierte ArbeitnehmerInnen, die im Schichtbetrieb arbeiten, werfen das Zusatzproblem auf, dass für jegliche offizielle und geförderte betriebliche Weiterbildung ein Ersatz gestellt werden muss, d.h. der notwendige Personalstand im Betrieb erhöht sich um mindestens 2% (Zitat Kap.3.12.3). Hier müssten Sonderförderungen angedacht werden, um diese zusätzlichen 2% Gehaltskosten zu refundieren. / Ein ähnliches Problem ergibt sich für Betriebe, die **geringfügig Beschäftigte** einsetzen und eine allfällige geförderte Weiterbildung für solche Arbeitskräfte in Anspruch nehmen wollen. Hier ist ebenfalls eine Sonderförderung notwendig.

p.182 [proposal] Die ExpertInnen machten auch Vorschläge hinsichtlich neuer und vereinfachter Förderkonzeptionen. / Bildungs-Scheck / Dabei erscheint ein sog. „Bildungsscheck“, der inhaltlich (berufs- oder private Weiterbildung) und anbietermäßig (Kombination verschiedener Anbieter) ohne Einschränkungen gilt, als anzustrebende Lösung. Jede/r OberösterreicherIn bekommt ihn und kann eine Bildungsmaßnahme machen, „egal ob und als was jemand beschäftigt ist.“ (Zitat) / Dabei soll die derzeitige strikte Trennung von beruflicher und allgemeiner Bildung bei der oö. Bildungsförderung aufgehoben und ein integriertes Fördermodelle allgemeiner und beruflicher Bildung geschaffen werden.

Occurrence of „selbständig“

p.55 Drei Berufsgruppen erweisen sich als besonders auffällig, was den Anteil an Niedrigqualifizierten betrifft. Überdurchschnittlich betroffen sind Selbständige in der Landwirtschaft, mithelfende Familienangehörige in der Landwirtschaft und vor allem ArbeiterInnen (ohne solche im öffentlichen Dienst).

p.100 Von jenen 0,8% der niedrig qualifizierten ÖsterreicherInnen über 70, die im letzten Jahr einen Kurs oder eine Schulung besucht haben, geben 22,2% an, die Fortbildung sei im landwirtschaftlichen Bereich abgehalten worden. Offensichtlich besuchen Selbständige oder mithelfende Familienangehörige aus der Landwirtschaft auch im höheren Alter noch Weiterbildungsveranstaltungen. Danach folgen allgemeine Bildungsgänge und Kurse aus dem Bereich Geisteswissenschaften und Künste mit jeweils 18,5%.

p.169/186repeat [proposal] Bildungs-Rahmenbedingung: „Inanspruchnahme von Beratungsangeboten“ Niedrigqualifizierte können sich in der Bildungslandschaft offensichtlich nicht ohne Weiteres zurechtfinden. Wenn ihnen eine gut zugängliche und effiziente Bildungsberatung zur Verfügung steht, steigt die Chance des (Wieder-)Einstiegs und des Verbleibs in der Weiterbildung deutlich. Solche Information und Beratung funktioniert derzeit für die Teilgruppe der LandwirtInnen durch das Netz der Bezirksbauernkammern relativ gut (überdurchschnittliche informelle Aktivitäten, vgl. Tabelle 116). Für andere Selbständige und vor allem die Gruppe der niedrigqualifizierten ArbeitnehmerInnen besteht hier offensichtlich ein Entwicklungsbedarf, der die zuständigen Interessenvertretungen, aber auch die Bildungspolitik betrifft.

7.2.6 Adult education provisions in collective agreements (examples)

Collective Agreements are very scattered in Austria. A platform provides more than 800 items (http://www.kollektivvertrag.at/cms/KV/KV_1.4/kollektivvertrag-suchen/alphabetische-liste), there are many agreements that cover individual enterprises or small, specific sectors, and there are different agreements for blue collar (Arbeiter) and white collar (Angestellte) workers in certain sectors.

Further education is generally mentioned in a section about equal treatment (Gleichbehandlung), in sections about tele-work, stating that teleworkers must not be discriminated with access to further education, and that they have to be routinely informed about opportunities.

Example 1: White collar workers in metal trades (Angestellte in Metallgewerbe)

Employers and employees make a common statement in the Annex that employers will support educational leave in a way that helps employees to upgrade their qualifications, and can get according positions.

<http://www.kollektivvertrag.at/kv/metallgewerbe-ang/kollektivvertrag/193242>

Anhang 3: Gemeinsame Erklärung der Kollektivvertragspartner zur Bildungskarenz

Example 2: Retailing (Handelsangestellte)

Here the collective agreement includes a statement about the allocation of working time, saying that further education is a legitimate cause for setting the weekly working according to the needs of the employee, this is in place after six months duration of the employment relationship.

<http://www.kollektivvertrag.at/kv/handelsangestellte-ang/handelsangestellte-rahmen/186084>, Abschnitt 4) Rahmen- und Entgeltbestimmungen zur Aus- und Weiterbildung, C. Bestimmungen zur Förderung berufsbegleitender Bildung

Example 3: Workers in construction (Bauindustrie und -gewerbe)

Employers have to pay the cost of legally mandatory training, and have to agree the provider, however, do not pay the training time (can be refunded).

<http://www.kollektivvertrag.at/kv/bauindustrie-und-baugewerbe-arb/bauindustrie-und-baugewerbe-rahmen/2966830>, para 11 Verschiedenes, pt.13

Example 4: Blue collar workers in electronics- and electrical engineering (Elektro- u. Elektronikindustrie)

This agreement includes several aspects: allocation of working time by night must consider participation in further education; one week per year paid time for further education (not including costs of education or travel) for employees after one year; in case of formal further education two unpaid weeks for preparation for exams; the annex includes a common statement about the principal support of further education, and non-discrimination of women in this area; the annex also includes a statement about the support of the educational leave program similar to example 1 above.

<http://www.kollektivvertrag.at/kv/elektro-u-elektronikindustrie-arb/elektro-u-elektronikindustrie-rahmen/206918>, Abschnitt 4 Arbeitszeit, pt.12 Berufliche Weiterbildung; Abschnitt 5 Freistellung und Entgeltfortzahlung, Aus- und Weiterbildung, Prüfungsvorbereitung; Anhang 5 Gemeinsame Erklärungen der Kollektivvertragsparteien, 2. Aus- und Weiterbildung, 3. Bildungskarenz.

Example 5: Plastics processing (Kunststoffverarbeitendes Gewerbe)

No provision of further education.

<http://www.kollektivvertrag.at/kv/kunststoffverarbeitendes-gewerbe-ang/kunststoffverarbeitendes-gewerbe-rahmen/4315192>,

Example 6: Wood processing, master craftsmen level (Holzbau-Meistergewerbe)

The agreement includes a statement to seek negotiations about the establishment of a further training fund.¹

<https://www.gpa-djp.at/kv/A03/holzbau-meistergewerbe-arb/holzbau-meistergewerbe-beilage-lohn-gehalt/205350>, Artikel V - Sonstige Vereinbarungen.

¹ „Artikel V - Sonstige Vereinbarungen.

Eine fortlaufende Aus- und Weiterbildung aller Arbeitnehmer und Lehrlinge ist eine der Herausforderung der Zukunft. Die Sozialpartner wollen daher die Möglichkeit der Schaffung eines „Aus- und Weiterbildungsfonds“ prüfen.“

7.3 Overview about support schemes for education and training in Austria

Upper Austria (main programs, including national programs)

Adult education
(1) <i>Bildungskonto</i>
(2) Bildungskarenz (educational leave, up to one year, income support, national)
(3) Bildungsteilzeit (part-time educational leave, income support, national)
(4) Fachkräftestipendium 2017/2018 (grant for medium level skilled employees, national)
(5) AK Bildungsbonus (supports education expenses for AK-members & specified courses)
(6) AK Leistungskarte (discount of education expenses for AK-members & specified courses)
(7) AK Reifeprüfungsbonus (supports second chance access to maturity exam)
(8) AK Bauhandwerker/-innen-Bonus (support education for construction workers)
Academic/higher education (h.e.)
(9) Staatliche Studienbeihilfe (regular study grants for higher education, national)
(10) Stipendium für Selbsterhalter/-innen (specific grant for adults in h.e., national)
(11) Studienabschlussstipendium (specific grant for final completion of h.e., national)
(12) AK Förderprogramm für Studierende (supports studies in higher education)
(13) AK-Wissenschaftspreis (award for research projects/publications, graduation papers)
School education
(14) Schulbeihilfen (grant at school level, national)
(15) Besondere Schulbeihilfe (specific grant at school level, national)
Enterprise training
(16) Weiterbildung in KMU (further education in SMEs)
More unspecific support
(17) AMS Bildungsförderungen (labor market training, national)
(18) Familienbeihilfe (general family support for children, national)

Source: AK-OOE (2018) Bildungsförderung, webpage

<https://ooe.arbeiterkammer.at/beratung/bildung/bildungsfoerderungen/Bildungsfoerderungen.htm>

Complete list from AK-Information, broken down by regions¹

<p>Central government, support schemes (23)</p>	<ul style="list-style-type: none"> +Förderung für Weiterbildung von ZeitarbeiterInnen +Besondere Schulbeihilfe für Berufstätige +SelbsterhalterInnenstipendium für Studium/Studienberechtigungsprüfung +Studienabschluss-Stipendium +Familienbeihilfe für Volljährige in Ausbildung +Berufsmatura: Lehre mit Reifeprüfung +Studienbeihilfe zur Studienberechtigungsprüfung +Heim- und Fahrtkostenbeihilfe +Förderungen für Personen mit Behinderungen - Ausbildungsbeihilfen +Förderungen für Personen mit Behinderungen - Hilfen zur wirtschaftlichen Selbständigkeit +Schulbeihilfe +Studienbeihilfe: Studienzuschuss +Studienbeihilfe +Förderungen für Personen mit Behinderungen - Arbeitsplatzbezogene Förderungen +Stipendien- und Forschungsförderungsdatenbank: grants.at +Kurse zum Nachholen des Pflichtschulabschlusses +Kurse im Bereich Basisbildung (Lesen, Schreiben, Rechnen) +Förderungen für Personen mit Behinderungen - Mobilitätsförderungen +Mobilitätsstipendium +Lehrlinge: Basisförderung für alle Lehrverhältnisse +Lehre für Erwachsene +Vorbereitungskurs auf die Lehrabschlussprüfung +Förderung für Facharbeiterausbildung von ZeitarbeiterInnen
<p>Central government, tax deduction (2)</p>	<ul style="list-style-type: none"> +BFB Bildungsfreibetrag für Unternehmen +Steuerliche Absetzbarkeit für ArbeitnehmerInnen
<p>AMS (national) (8)</p>	<ul style="list-style-type: none"> +Weiterbildungsgeld bei Bildungskarenz oder Freistellung gegen Entfall der Bezüge +Beihilfe zu Kurskosten, Kursnebenkosten und zur Deckung des Lebensunterhaltes +Bildungsteilzeitgeld +Fachkräftestipendium 2015 +Beihilfe zusätzlich zum Bildungsteilzeitgeld +Unternehmensgründungsprogramm +Überbetriebliche Lehrausbildung +Förderung der Lehrausbildung durch das AMS
	<p>B K N O S St T V W</p>

¹ <http://www.bildungsfoerderungen.at/uebersicht.php>

AMS
(regional)
(1)

+AMS St -
Förderung
von
technischen
Fachhochsch
ulen

Regions, communes (63)	B (4)	K (5)	N (15)	O (7)	S (3)	St (5)	T (3)	V (9)	W (12)
	+Fahrtkosten zuschuss für Lehrlinge +Lehrlings- förderungs- zuschuss +Qualifika- tionsför- derungs- zuschuss des Landes Burgenland +Wohnkosten zuschuss für Lehrlinge	+Bildungs- förderung des Landes +Fahrtkosten zuschuss für berufstätige Abendschüler Innen +Fahrtkosten zuschuss für Lehrlinge +Frauen- bildungsfonds +Heim- und Wohnkosten- zuschuss für Lehrlinge	+NÖ BONUS: Semester- ticket - Gutschein +NÖ Lehrlings- förderung - Mobilitätsför- derung +Bildungs- förderung – Berufsreife- prüfung +Bildungs- förderung – Sonderpro- gramm "NÖ Bildungs- darlehen" +Bildungs- förderung – Sonderpro- gramm "NÖ Weiterbil- dungsscheck" +Bildungsförd erung Neu +Kursgeld 2.0. Auslands- förderung +Kursgeld 2.0. Fachliche Zusatzquali- fikation +Kursgeld 2.0.	+Bildungs- konto des Landes OÖ +Fachkraft 2.0 +Projekt "Du kannst was!" +Schulbeginn- hilfe +Schulveran- staltungshilfe +START- Stipendium +Wirtschafts- Impulspro- gramm des Landes OÖ	+Bildungs- scheck des Landes S +Internats- beihilfe für Lehrlinge +Meister- Scheck	+Bildungs- scheck für die außer- ordentliche Lehrabschluss prüfung +Grazer Fonds für Aufstieg und Entwicklung +Lehrlings- beihilfe +Pendler- Innenbeihilfe +Steirischer Bildungs- scheck für Lehrlinge und Lehrabsol- ventInnen	+Schulstart- hilfe +Tiroler Bildungs- förderung – Ausbildungs- beihilfe +Tiroler Bildungs- förderung - Bildungsgeld update	+Auslands- stipendium für Lehrabsol- venten/innen +Bildungs- zuschuss: Bildungs- konto +Bildungs- zuschuss: Bildungs- prämie bei Absolvierung der Berufsreife- prüfung bzw. Studien- berechtigung sprüfung +Bildungs- zuschuss: Bildungs- prämie für Arbeitnehmer /innen +Bildungs- zuschuss: Bildungs- prämie für Unternehmer /innen +Bildungs- zuschuss: Startkapital +START- Stipendium	+Gratis- Lernunter- stützung für Lehrlinge +START- Stipendium +waff Bildungs- bonus +waff Bildungs- konto +waff Chancen- Scheck +waff doppelter Weiter- bildungs- Tausender +waff Fachkräfte- qualifizierung +waff Förderung der Ausbildung von Lehrausbil- derInnen +waff FRECH +waff Personal- finder - Jobs mit Ausbildung

										Persönlichkeitsbildende Zusatzqualifikation +Lehrlingsförderung – Lehrlingsbeihilfe +Schülerbeihilfe +Stipendium der "Allgemeine Stipendienstiftung Niederösterreich" +Stipendium der "Michael von Zoller-Stiftung" +Stipendium der "Windhag-Stipendienstiftung für Niederösterreich" +Stipendium des Siegfried Ludwig-Fonds	+Stipendium aus Landesmitteln und aus Mitteln der Dr. Otto-Ender-Stiftung +Wohnzuschuss für Lehrlinge	+waff Programm für Karenz und Wiedereinstieg +waff Qualifizierungsförderung für Wiener Unternehmen
Chambers (national) (WK: 1)	+Förderung für Ausbildungsbetriebe: Förderung von Auslandspraktikum von Lehrlingen											
	B (AK: 5)	K (AK: 1)	N (AK: 8) (WK: 2)	O (AK: 5)	S (AK: 0) (WK: 1)	St (AK: 7) (WK: 1)	T (AK: 5)	V (AK: 2)	W (AK: 1)			
Chambers (regional) Chambers: 38 AK: 34	+AK-Bildungsgutschein +AK-Lehrbeihilfe +AK-Schulbeihilfe	+Bildungsgutschein der AK	+AK NÖ "Bildungsbonus - spezial", Schwerpunkt:	+AK – Förderprogramm für Studierende +AK-Bauhand-		+60 Euro Bildungsscheck der AK +AK Beihilfe zur	+AK – Bildungsbeihilfe für Schülerinnen und Schüler	+AK-Basicsbonus für Lehrabsolvent/innen +Ermäßigung für Ak-	AK-Bildungsgutschein			

+AK-Schulbeihilfe für den 2. Bildungsweg +Lehre mit Matura	Außerordentliche Lehrabschlussprüfung (a.o. LAP) +AK NÖ "Bildungsbonus - spezial", Schwerpunkt: Berufsreifeprüfung +AK NÖ "Bildungsbonus - spezial", Schwerpunkt: Gesundheit-Heimhilfe +AK NÖ "Bildungsbonus - spezial", Schwerpunkt: Gesundheit-Pflegehilfe +AK NÖ "Bildungsbonus - spezial", Schwerpunkt: Nostrifikation +AK NÖ "Bildungsbonus - spezial", Schwerpunkt:	werkerInnenbonus +AK-Bildungsbonus +AK-Leistungskartenermäßigung +AK-Reifeprüfungsbonus	Berufsreifeprüfung +AK Förderung wissenschaftlicher Arbeiten +AK Schulbeihilfe +AK-Ausbildungsförderung für Gesundheits- und Sozialberufe +AK-Bildungsguthaben für Eltern (Karenzbildungskonto) +AK-Studienbeihilfe	+AK – Bildungsbeihilfe für Studentinnen und Studenten +AK - ZUKUNFTS: AKTIE für EDV-Grundlagen +AK-Bildungsbeihilfe für das Nachholen von Bildungsabschlüssen bei kostenpflichtigen Vorbereitungskursen +AK-Bildungsbeihilfe für Lehrlinge	Mitglieder bei BFI-Kursen
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					Reinigungskurse +AK NÖ "Bildungsbonus - spezial", Schwerpunkt:Vorbereitungskurse FH/Kolleg/ Aufbaulehrgang +Bildungsbonus der AK NÖ				
Chambers (WK: 4)					+Erfolgsprämie der Wirtschaftskammer NÖ für Absolvent/innen der Berufsreifeprüfung +WK- Bildungsscheck	+Beihilfen für HTL- Schüler/innen ab dem 3. Jahrgang	+WK - Förderung von Vorbereitungskursen für die Lehrabschlussprüfung		
Trade Unions (national, sectoral) (7)	+Bildungsförderungsbeitrag (BFB) der Gewerkschaft Öffentlicher Dienst +Förderung der Gewerkschaft younion_Die Daseinsgewerkschaft +GPA-djp Bildungsunterstützung +Johann Böhm Stipendien des ÖGB +Kurszuschuss der Gewerkschaft Bau-Holz +Kurszuschuss der Gewerkschaft PRO-GE +Kurszuschuss der GPF - Gewerkschaft der Post- und Fernmeldebediensteten								
Trade Unions (regional, sectoral) (10)	B (1) +GPA-djp Zuschuss im 2. Bildungsweg	K (1) +GPA-DJP - Kärnten Kurs- zuschüsse	N	O	S (2) +GPA Bildungsunter- stützung +GPA-DJP - Zuschuss bei Abschlüssen	St (1)(+GPA-DJP - Bildungsunter- stützung	T (2) GPA-DJP T – Kursrück- vergütung für berufs- bezogene	V (1) +GPA-DJP V Zuschuss bei Abschlüssen im 2. Bildungsweg	W (2) +GPA-djp – Kursrück- vergütung für berufs- bezogene

					im 2. Bildungsweg				Weiter- bildung +GPA-DJP T - Zuschuss bei Abschlüssen im 2. Bildungsweg		Weiter- bildung +GPA-djp - Zuschuss bei Abschlüssen im 2. Bildungsweg
Special programs (national) (19)	<ul style="list-style-type: none"> +Arbeitsplatznahe Qualifizierung: AQUA/ ANQ +Arbeitsstiftungen +Begabtenförderung Lehrlingsmobilität +Beihilfe für Gebärdensprachdolmetschkosten +Beihilfe zum Umschulungsgeld +Berufsbildungsförderung: Land- und Forstwirtschaft +Deutschkurse für anerkannte Flüchtlinge und Menschen mit subsidären Schutz +Entfernungsbeihilfe +Förderungen für Lehrlinge: Förderungen für ein Praktikum im Ausland +Industriellenvereinigung - Stipendium der Dr. Franz Josef Mayer-Gunthof-Stiftung +Inlandsstipendium des Julius-Raab-Stipendienfonds +Kinderbetreuungsbeihilfe durch das AMS +Förderung der Berufsreife -NÖ Landeskliniken-Holding +Lehre mit Matura +Lehrlingsförderung - Begabtenförderung +Schülerunterstützung für die Teilnahme an Schulveranstaltungen +Studienunterstützung (SUS) +Übersiedlungsbeihilfe +Umschulungsgeld 										
Special programs (regional) (8)	B	K (1)	N	O (3)	S (3)	St (1)	T	V	W		
		+Fahrtkosten zuschuss für Lehrlings- und Berufswettbe- werbe		+Aktivpass der Stadt Linz +Lehrlings- ermäßigung beim BFI +Senioren- pass der Stadt Steyr	+Erika- Hingler- Sieber- Stiftung +START- Stipendium +Stipendien an der Sommer- akademie für Bildende Kunst in S	+Förderungen der sfg - Steirische Wirtschafts- förderungs- gesellschaft					

7.4 Detailed data of Bildungskonto 2017

7.4.1 Tables

Table 11: Parameters of Bildungskonto: number applications and course participation, expenditure for support and courses total in EURO, support per application and per course, per cent support, courses per applicant

	Applications	Course particip	Course exp	Support exp	Support/ appl	Support/ course	%Su pport	Course/applic
Total	14.558	17.570	19.118.692	7.597.391	522	432	40%	1,21
Employment status								
Employed	11.534	13.747	14.690.747	5.741.908	498	418	39%	1,19
Unempl, welfare	1.087	1.255	1.216.300	517.411	476	412	43%	1,15
Child care, return	494	569	654.468	358.743	726	630	55%	1,15
Ed leave	420	621	1.065.136	403.747	961	650	38%	1,48
NON-STANDARD								
EMPL.sum	1.023	1.378	1.492.040	575.581	563	418	39%	1,35
One-person-entpr	903	1.211	1.322.305	504.230	558	416	38%	1,34
Self-employed	58	62	73.912	34.252	591	552	46%	1,07
Small enterpr	62	105	95.823	37.099	598	353	39%	1,69
Education								
	Applications	Course particip	Course exp	Support exp	Support/appl	Support/course	%Support	Course/applic
Low skill	1.630	1.753	1.157.416	543.982	334	310	47%	1,08
Apprenticeship	7.031	8.683	9.874.308	3.883.693	552	447	39%	1,23
Medium VET	1.941	2.392	2.510.099	994.880	513	416	40%	1,23
Advanced ED/VET	3.010	3.614	4.025.963	1.556.034	517	431	39%	1,20
Pedagogy	74	85	113.691	39.239	530	462	35%	1,15
HigherEd	872	1.043	1.437.215	579.564	665	556	40%	1,20

Programs

	Applications	Course particip	Course exp	Support exp	Support/appl	Support/course	%Support	Course/applic
APPR.TRAIN.EXAM	102	104	54.404	21.913	533	215	40%	1,02
APPR.MA.EXAMtrades2	182	228	471.364	174.326	2590	958	37%	1,25
MATURITY.EXAM	1.482	2.399	1.962.295	788.557	1324	532	40%	1,62
ICT	388	452	452.938	187.506	1167	483	41%	1,16
Postsec	42	57	130.790	45.739	3114	1089	35%	1,36
Health/social	3.139	3.748	5.361.013	2.118.144	1708	675	40%	1,19
Trades	112	128	172.884	71.322	1544	637	41%	1,14
Business	1.402	1.778	1.844.967	745.359	1316	532	40%	1,27
LICENCE.EXAM	11	15	12.456	5.177	1132	471	42%	1,36
Agriculture	62	64	88.095	43.906	1421	708	50%	1,03
APPR.EXAM	663	777	713.939	346.666	1077	523	49%	1,17
sub: APPR.EXAM60%	182	199	247.241	145.192	1358	798	59%	1,09
sub: APPR.EXAM40%	481	578	466.698	201.474	970	419	43%	1,20
APPR.MA.EXAMtrades1	272	360	1.044.880	362.484	3841	1333	35%	1,32
Appr.ma.schools	11	11	39.289	11.639	3572	1058	30%	1,00
Personality	185	221	239.419	98.314	1294	531	41%	1,19
Mixed, rest	357	404	655.807	266.938	1837	748	41%	1,13
Language	3.356	3.571	1.403.666	695.808	418	207	50%	1,06
sub: Lang.GERM-intgr60%	2.132	2.185	1.012.770	527.984	475	248	52%	1,02
sub: Lang.40%	1.224	1.386	390.896	167.824	319	137	43%	1,13
HE.FH.ACCESS.EXAM	122	187	106.022	42.854	869	351	40%	1,53
Technology	1.725	1.907	1.468.446	584.462	851	339	40%	1,11
Tourism	59	61	98.047	38.985	1662	661	40%	1,03
Univ.course	202	223	1.172.981	317.022	5807	1569	27%	1,10
ENTREP.EXAM	203	207	378.574	143.153	1865	705	38%	1,02
APPR.MA.EXAMindustr	608	668	1.246.417	487.117	2050	801	39%	1,10
Average (22cat)	668	799	19.118.692	7.597.391	1302	517	40%	1,20
Total	14.685	17.570	19.118.692	7.597.391	1302	517	40%	1,20

**Sub-regions
(Bezirk)**

	Applications	Course particip	Course exp	Support exp	Support/appl	Support/course	%Support	Course/applic
Linz	2.373	2.779	2.736.873	1.100.223	464	396	40%	1,17
Steyr	328	386	394.591	160.796	490	417	41%	1,18
Wels	583	695	653.506	264.367	453	380	40%	1,19
BezBraunau	826	974	1.057.252	423.989	513	435	40%	1,18
BezEferding	301	360	432.680	175.115	582	486	40%	1,20
BezFreistadt	610	779	909.943	359.722	590	462	40%	1,28
BezGmunden	957	1.136	1.204.113	482.100	504	424	40%	1,19
BezGrieskirchen	675	784	932.577	365.780	542	467	39%	1,16
BezKirchdorf	536	663	787.094	309.315	577	467	39%	1,24
BezLinz-Land	1.437	1.760	1.802.247	719.097	500	409	40%	1,22
BezPerg	619	761	918.596	363.786	588	478	40%	1,23
BezRied	658	817	868.596	338.673	515	415	39%	1,24
BezRohrbach	596	710	826.613	326.486	548	460	39%	1,19
BezSchärding	557	657	750.115	289.898	520	441	39%	1,18
BezSteyr-Land	532	658	740.203	293.067	551	445	40%	1,24
BezUrfahr-Umgebung	731	967	1.193.964	461.540	631	477	39%	1,32
BezVöcklabruck	1.514	1.769	1.833.102	739.338	488	418	40%	1,17
BezWels-Land	697	844	958.387	382.212	548	453	40%	1,21
Outside OOE	47	59	102.436	35.563	757	603	35%	1,26
No regional info	11	12	15.808	6.323	575	527	40%	1,09
Total	14.588	17.570	19.118.692	7.597.391	521	432	40%	1,20

Table 12: Per cent distribution of parameters of Bildungskonto

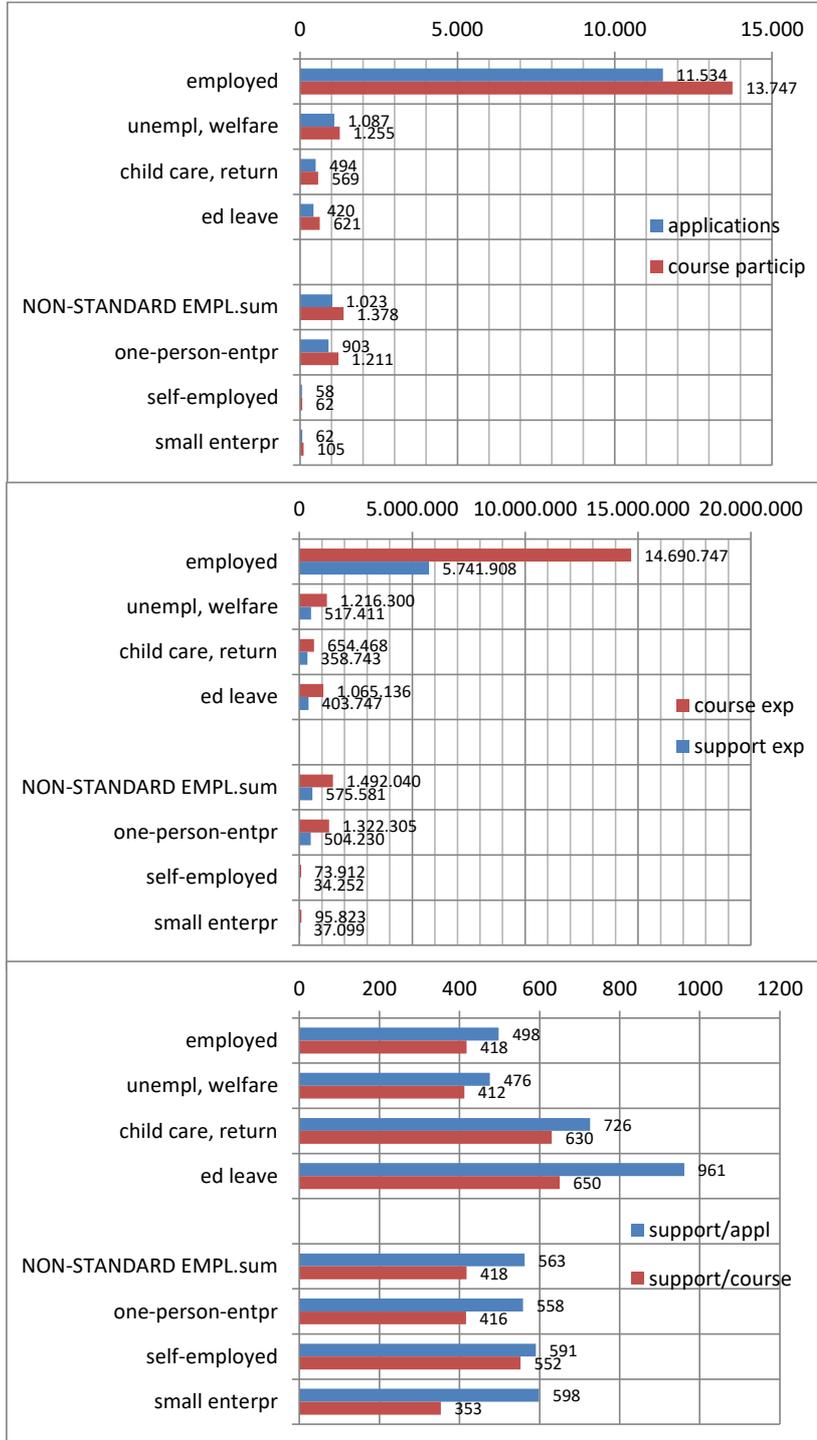
	Applications	Course particip	Course exp	Support exp
Programs				
APPR.TRAIN.EXAM	0,7%	0,6%	0,3%	0,3%
APPR.MA.EXAMtrades2	1,3%	1,3%	2,5%	2,3%
MATURITY.EXAM	10,2%	13,7%	10,3%	10,4%
ICT	2,7%	2,6%	2,4%	2,5%
Postsec	0,3%	0,3%	0,7%	0,6%
Health/social	21,6%	21,3%	28,0%	27,9%
Trades	0,8%	0,7%	0,9%	0,9%
Business	9,6%	10,1%	9,7%	9,8%
LICENCE.EXAM	0,1%	0,1%	0,1%	0,1%
Agriculture	0,4%	0,4%	0,5%	0,6%
APPR.EXAM	4,6%	4,4%	3,7%	4,6%
sub: APPR.EXAM60%	1,3%	1,1%	1,3%	1,9%
sub: APPR.EXAM40%	3,3%	3,3%	2,4%	2,7%
APPR.MA.EXAMtrades1	1,9%	2,0%	5,5%	4,8%
Appr.ma.schools	0,1%	0,1%	0,2%	0,2%
Personality	1,3%	1,3%	1,3%	1,3%
Mixed, rest	2,5%	2,3%	3,4%	3,5%
Language	23,1%	20,3%	7,3%	9,2%
sub: Lang.GERM-intgr60%	14,6%	12,4%	5,3%	6,9%
sub: Lang.40%	8,4%	7,9%	2,0%	2,2%
HE.FH.ACCESS.EXAM	0,8%	1,1%	0,6%	0,6%
Technology	11,8%	10,9%	7,7%	7,7%
Tourism	0,4%	0,3%	0,5%	0,5%
Univ.course	1,4%	1,3%	6,1%	4,2%
ENTREP.EXAM	1,4%	1,2%	2,0%	1,9%
APPR.MA.EXAMIndustr	4,2%	3,8%	6,5%	6,4%
Sub-regions (Bezirk)				
Linz	16,3%	15,8%	14,3%	14,5%
Steyr	2,3%	2,2%	2,1%	2,1%
Wels	4,0%	4,0%	3,4%	3,5%
BezBraunau	5,7%	5,5%	5,5%	5,6%
BezEferding	2,1%	2,0%	2,3%	2,3%
BezFreistadt	4,2%	4,4%	4,8%	4,7%
BezGmunden	6,6%	6,5%	6,3%	6,3%
BezGrieskirchen	4,6%	4,5%	4,9%	4,8%
BezKirchdorf	3,7%	3,8%	4,1%	4,1%
BezLinz-Land	9,9%	10,0%	9,4%	9,5%
BezPerg	4,3%	4,3%	4,8%	4,8%
BezRied	4,5%	4,6%	4,5%	4,5%
BezRohrbach	4,1%	4,0%	4,3%	4,3%
BezSchärding	3,8%	3,7%	3,9%	3,8%
BezSteyr-Land	3,7%	3,7%	3,9%	3,9%
BezUrfahr-Umgebung	5,0%	5,5%	6,2%	6,1%
BezVöcklabruck	10,4%	10,1%	9,6%	9,7%
BezWels-Land	4,8%	4,8%	5,0%	5,0%
Outside OOE	0,3%	0,3%	0,5%	0,5%
No regional info	0,1%	0,1%	0,1%	0,1%
Total	100,2%	100,0%	100,0%	100,0%

Table 13: Original Austrian expressions and translations/abbreviations of categories

Gesamt	Total
Employment status	
inArbeitsverhältnis	Employed
Arbeitslos, Notstand	Unempl, welfare
Karenz(Mutterschaft,Eltern), Kinderbetreuungsgeldbezieher/innen, Wochengeldbezieherinnen, Wiedereinstieg	Child care, return
Bildungskarenz	Ed leave
	NON-STANDARD EMPL.sum
Ein-Personen-Unternehmen	One-person-entpr
SelbständigeBetriebsführer/innen	Self-employed
Klein-Mittelunternehmen	Small enterpr
Education	
Ungelernt	Low skill
Lehre	Apprenticeship
Fach/Handelsschule	Medium VET
Matura	Advanced ED/VET
PädAusbildung	Pedagogy
Akademiker	HigherEd
Programs	
Ausbilderprüfung	APPR.TRAIN.EXAM
Befähigungsprüfung	APPR.MA.EXAMtrades2
Berufsreifeprüfung	MATURITY.EXAM
EDV-Kurse	ICT
Fachakademie	Postsec
Gesundheit und Soziales	Health/social
HandwerklicheKurse	Trades
Kfm. und betriebsw. Ausbildung (REFA,wirtschaftl. Ausbildung, Betriebsleiter, Lagerlehrgang, Buchhaltung)	Business
Konzessionsprüfung	LICENCE.EXAM
Landwirtschaftl.Kurse	Agriculture
<u>Lehrabschlussprüfung</u>	APPR.EXAM
Ausnahmsweise Zulassung zur Lehrabschlussprüfung (60%ige Förderung)	sub: APPR.EXAM60%
Lehrabschlussprüfung (40%ige Förderung)	sub: APPR.EXAM40%
Meisterprüfung	APPR.MA.EXAMtrades1
Meisterschulen	Appr.ma.schools
Persönlichkeitsbildung (Supervisor)	Personality
Sonstiges (Lagerlehrgang, Abfallbeauftragte, Werbedesigner, HTL f.Berufstätige)	Mixed, rest
<u>Sprachen</u>	Language
Sprache-Deutsch-Integration (60%ige Förderung)	sub: Lang.GERM-intgr60%
Sprachen (40%ige Förderung)	sub: Lang.40%
Studienberechtigungsprüfung / FH-Vorbereitungslhrgang	HE.FH.ACCESS.EXAM
Technische Ausbildung (CAD, Schweißen, Starkstrom, Kran- u. Staplerführerschein, Polier)	Technology
Tourismus	Tourism
Universitätslehrgang/LUC	Univ.course
Unternehmerprüfung	ENTREP.EXAM
Werkmeister	APPR.MA.EXAMindustr
Gesamt	Total

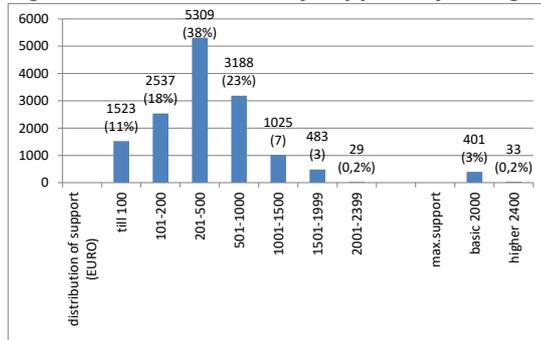
7.4.2 Figures

Figure 27: Parameters of Bildungskonto by employment status



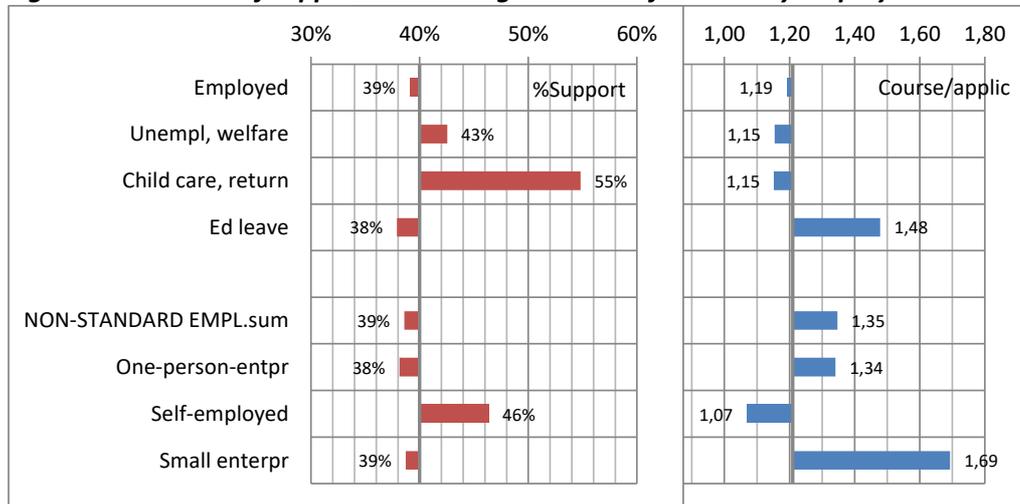
Source: Authors figure based on Land OOE 2017; first panel number of applications and course participations by applicants (can be more than one); second panel expenditure for Bildungskonto support and total courses in EURO; third panel average support and course expenditure per applicant.

Figure 28: Distribution of support by categories



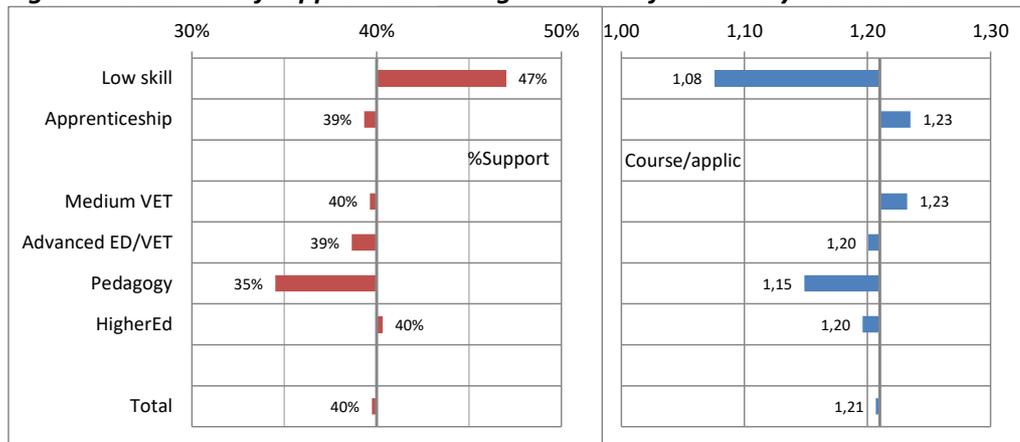
Source: Authors figure based on Land OOE 2017

Figure 29: Amount of support and average number of courses by employment status



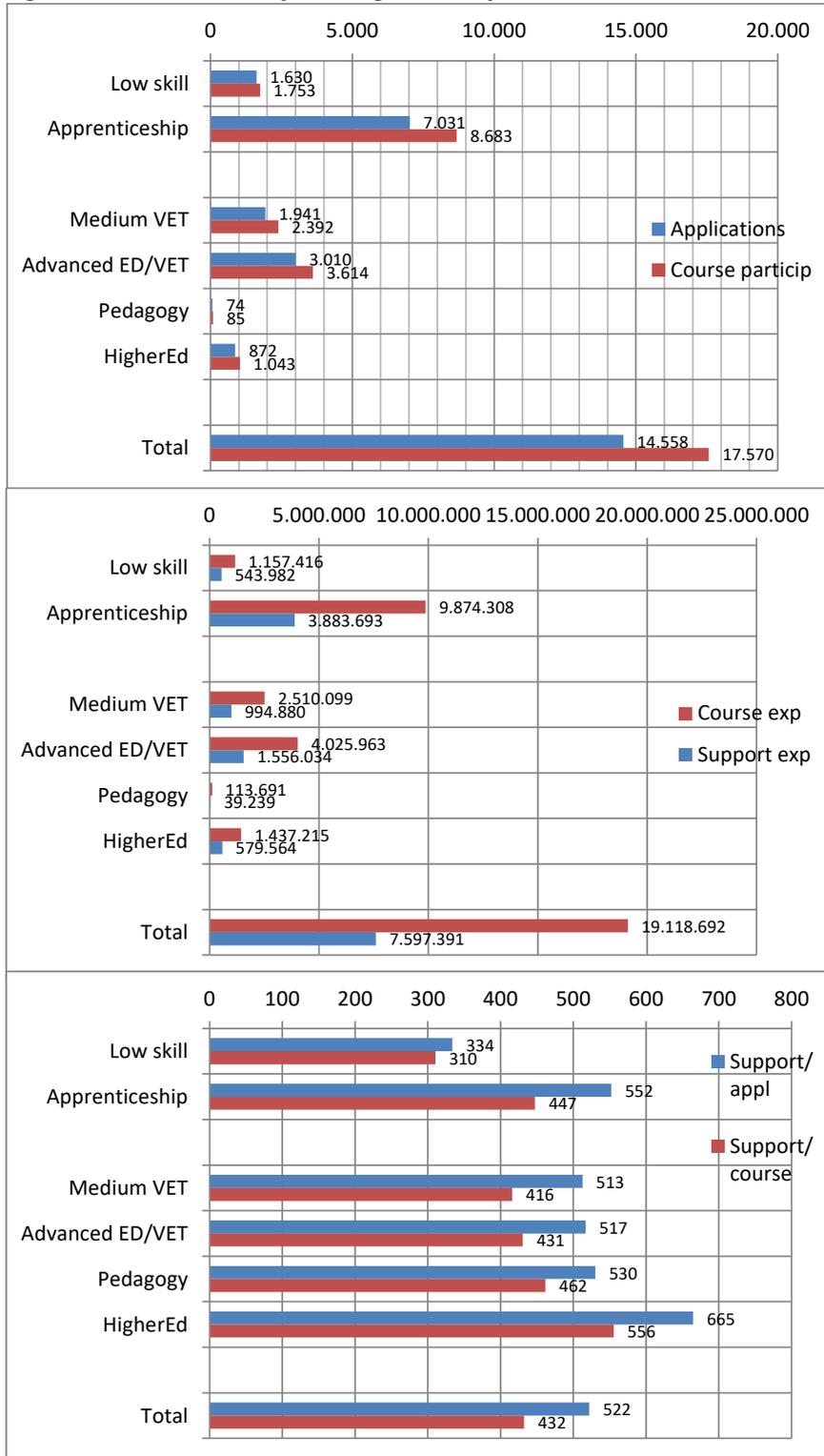
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average

Figure 30: Amount of support and average number of courses by education



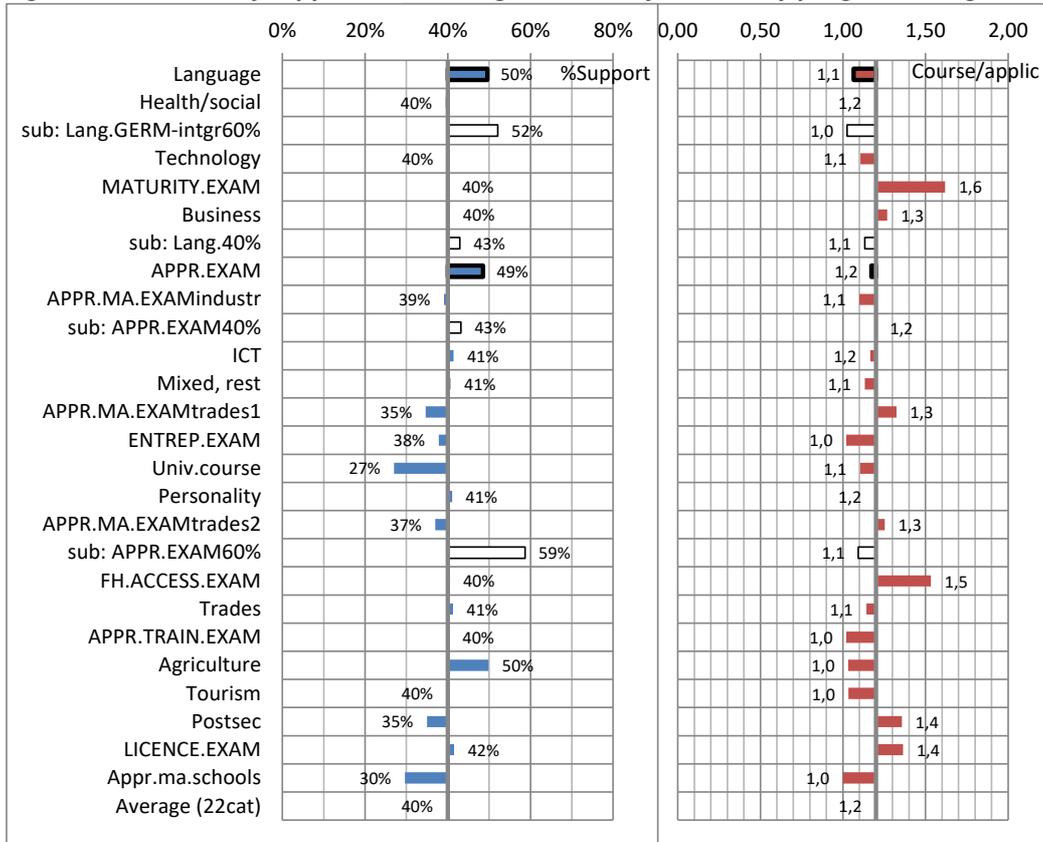
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average

Figure 31: Parameters of Bildungskonto by education



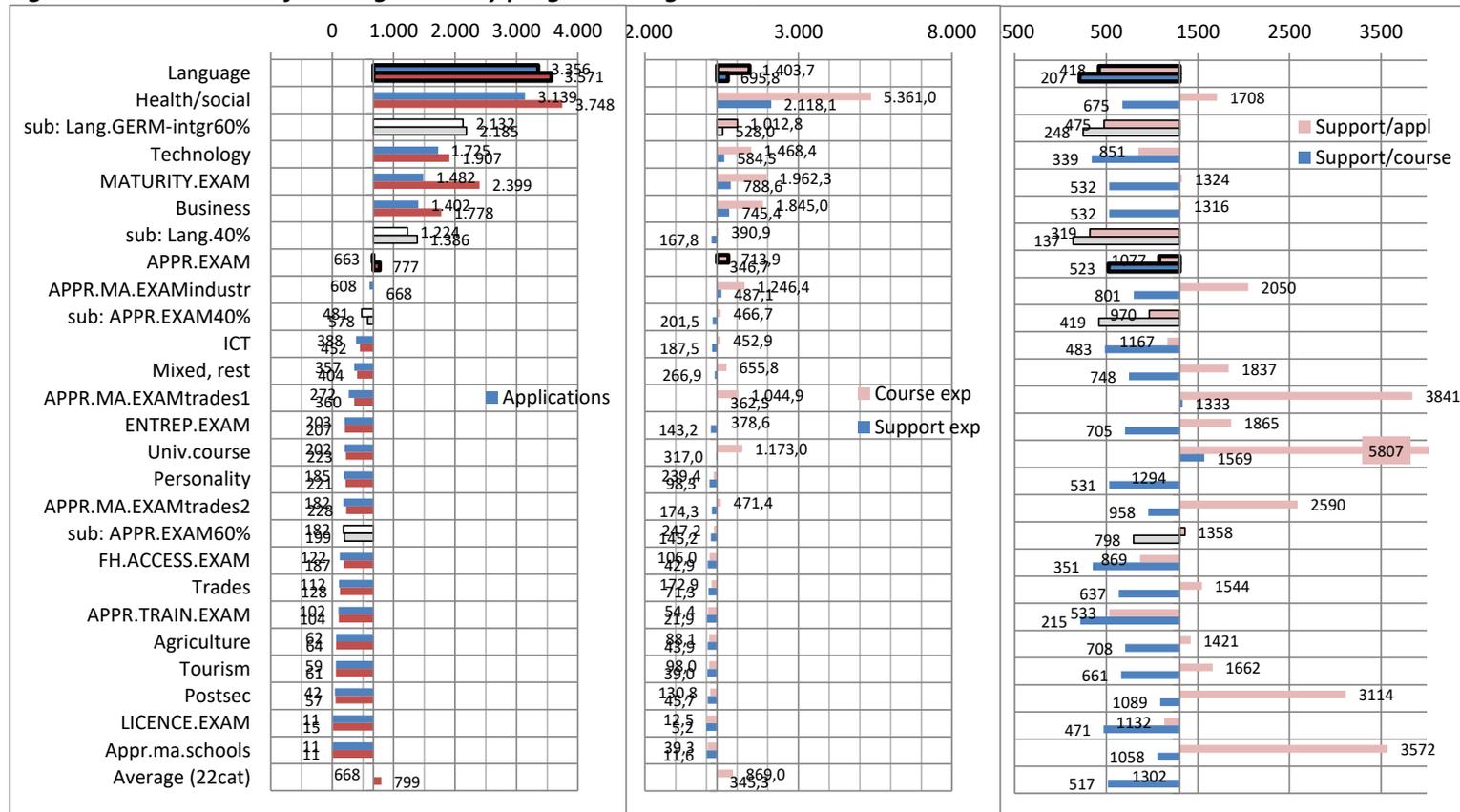
Source: Authors figure based on Land OOE 2017; first panel number of applications and course participations by applicants (can be more than one); second panel expenditure for Bildungskonto support and total courses; third panel average support and course expenditure per applicant.

Figure 32: Amount of support and average number of courses by program categories



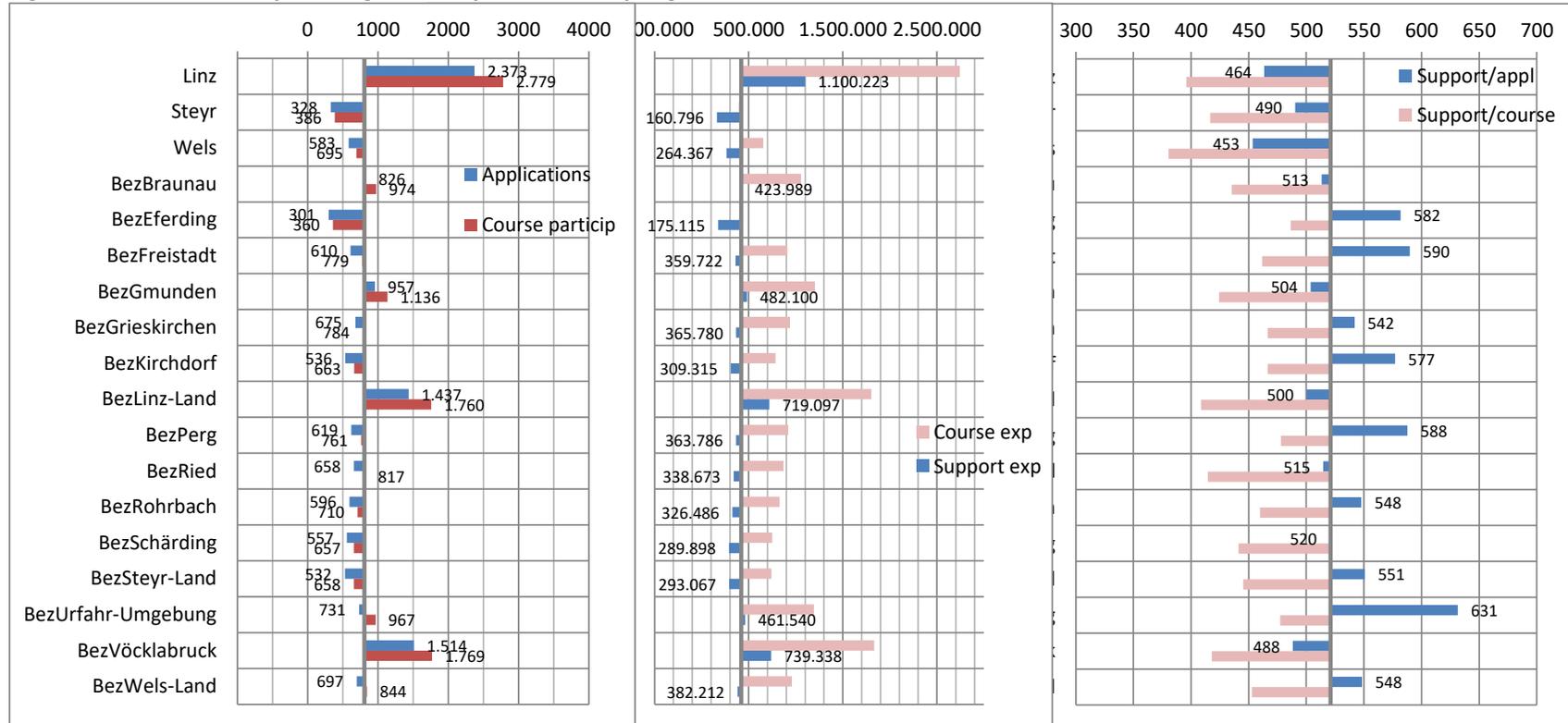
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average; program categories ordered by number of applications; Language programs and APPR.EXAM apprenticeship programs (thick black border) also differentiated by the sub-categories of basic and higher amount of support (40% and 60%, border and white fill)

Figure 33: Parameters of Bildungskonto by program categories



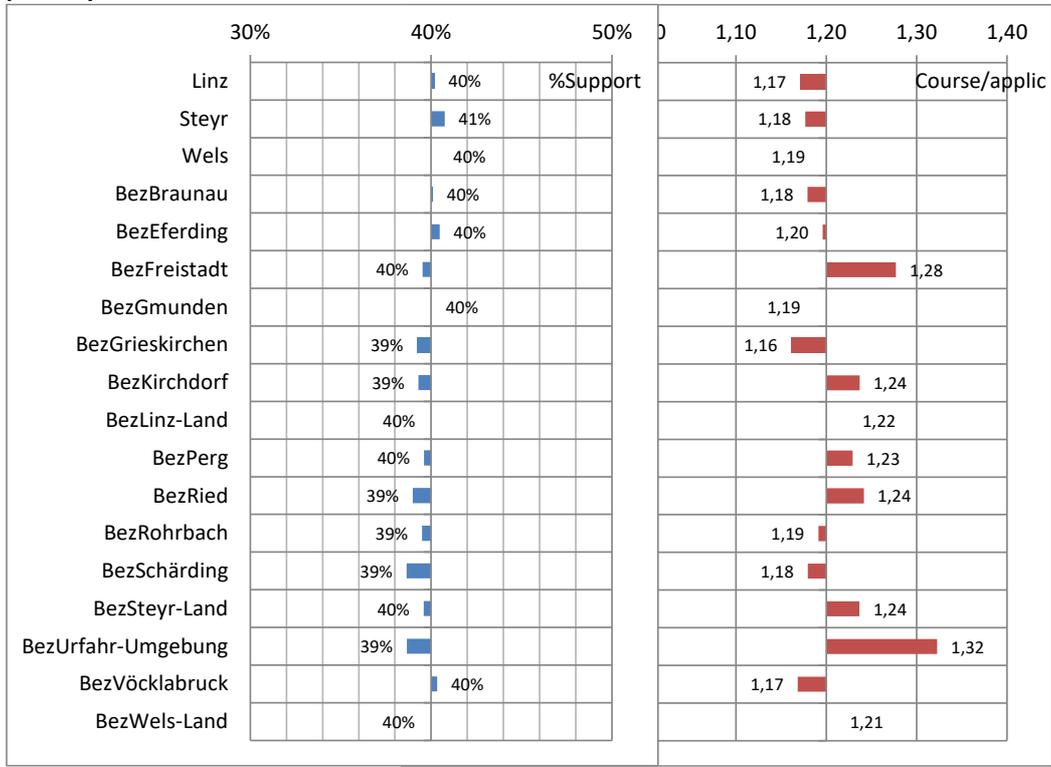
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average; first panel number of applications and course participations by applicants (can be more than one); second panel expenditure for Bildungskonto support and total courses in thousand EURO; third panel average support and course expenditure per applicant.

Figure 34: Parameters of Bildungskonto by education by regional sub-units (Bezirk)



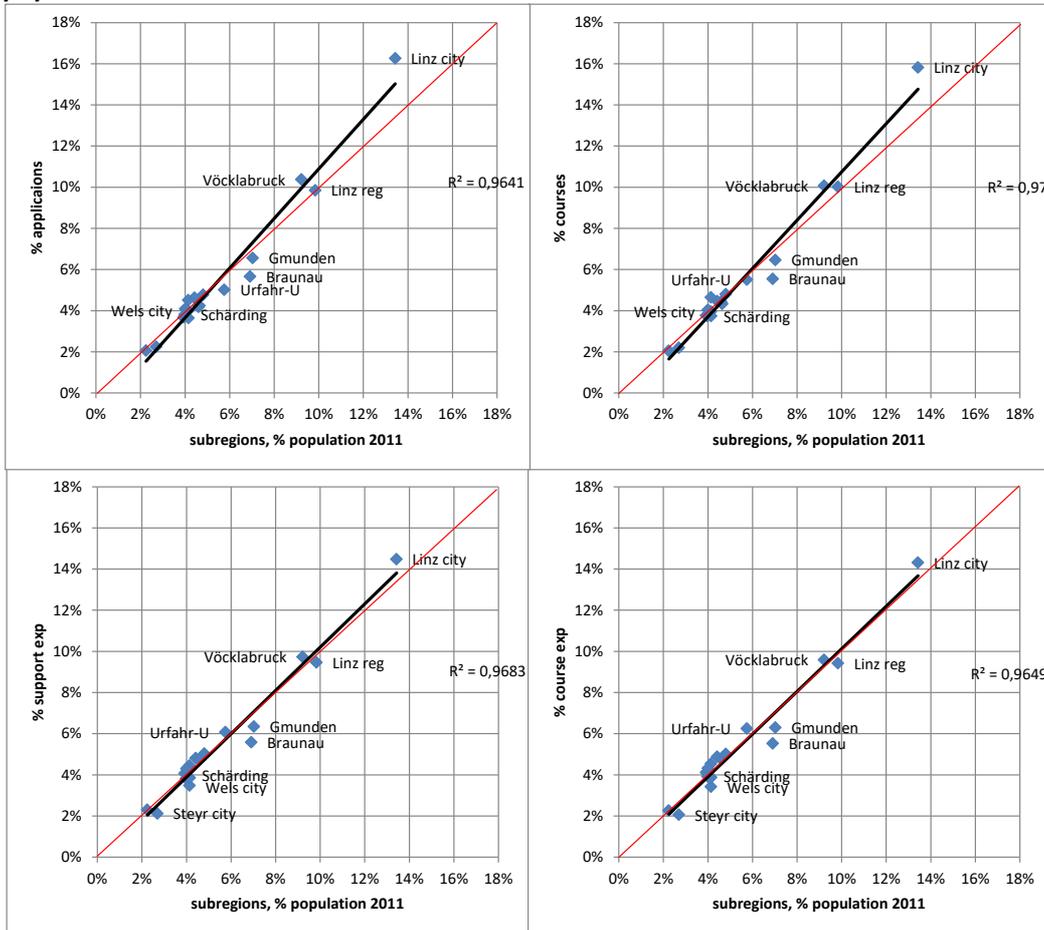
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average; first panel number of applications and course participations by applicants (can be more than one); second panel expenditure for Bildungskonto support and total courses in EURO; third panel average support and course expenditure per applicant.

Figure 35: Amount of support and average number of courses by regional sub-units (Bezirk)



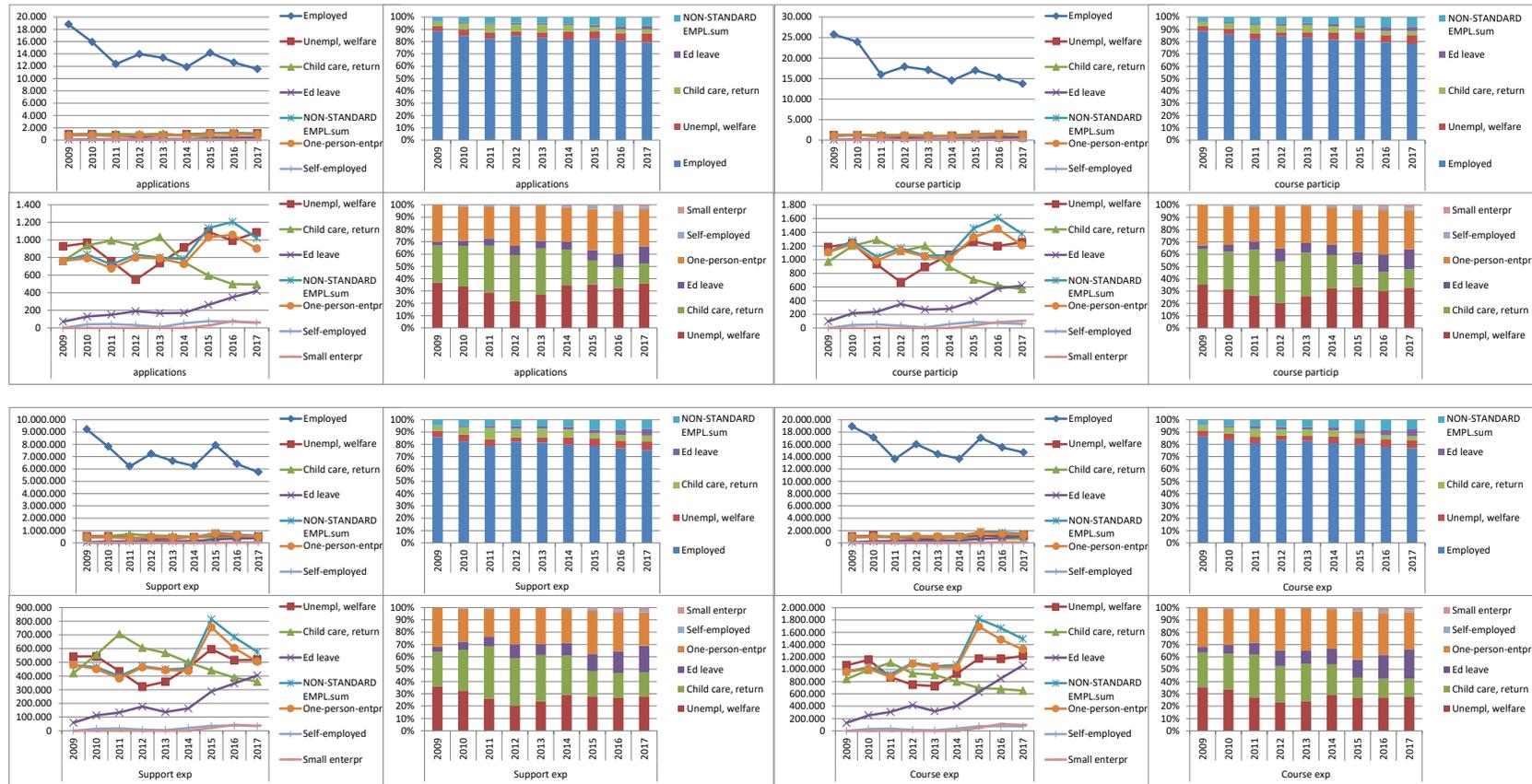
Source: Authors figure based on Land OOE 2017; y-axis set at the total average of variables, bars left: below average, bars right above average.

Figure 36: Sub-regional distribution of Bildungskonto parameters compared to the population

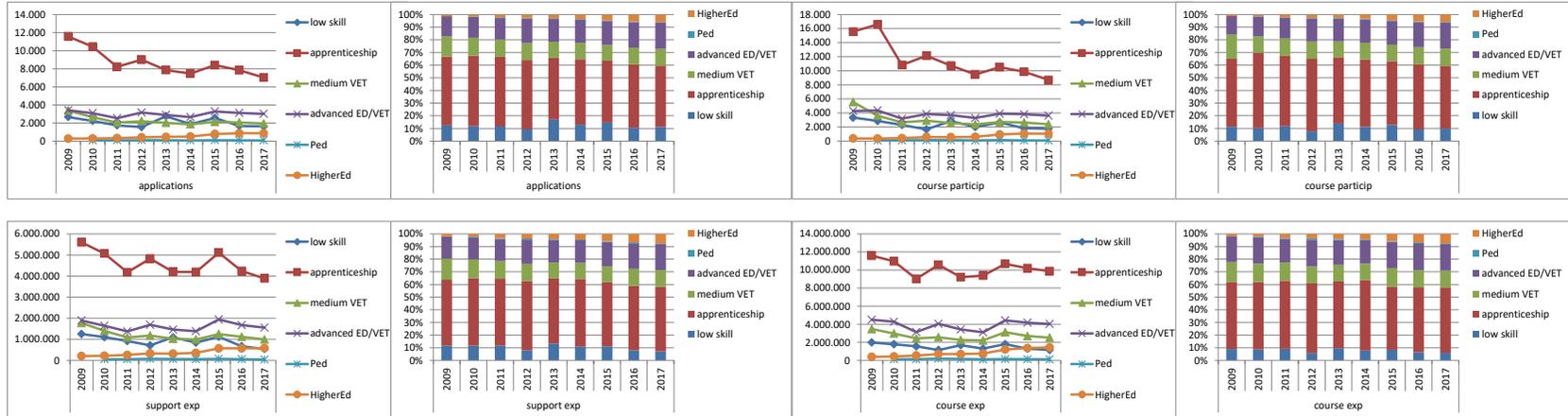


7.4.3 Time series of background characteristics 2009-17

Applications, course participation, support and course expenditure by employment categories

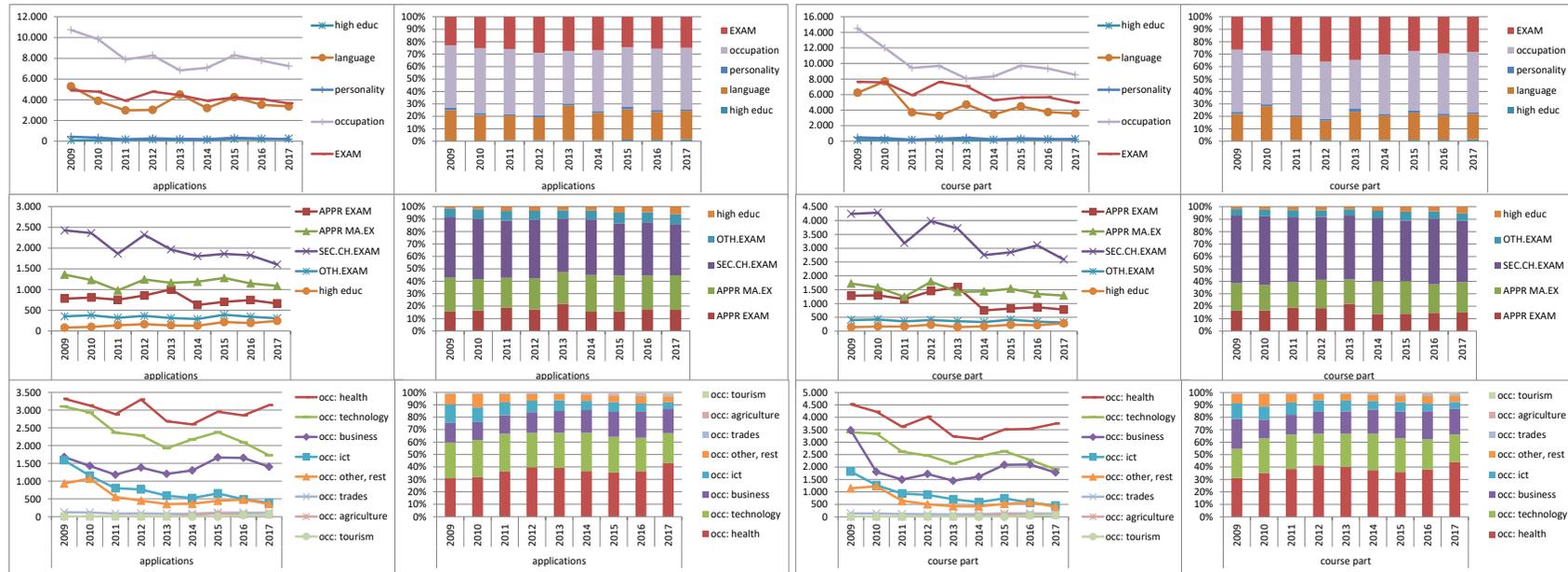


Applications, course participation, support and course expenditure by education

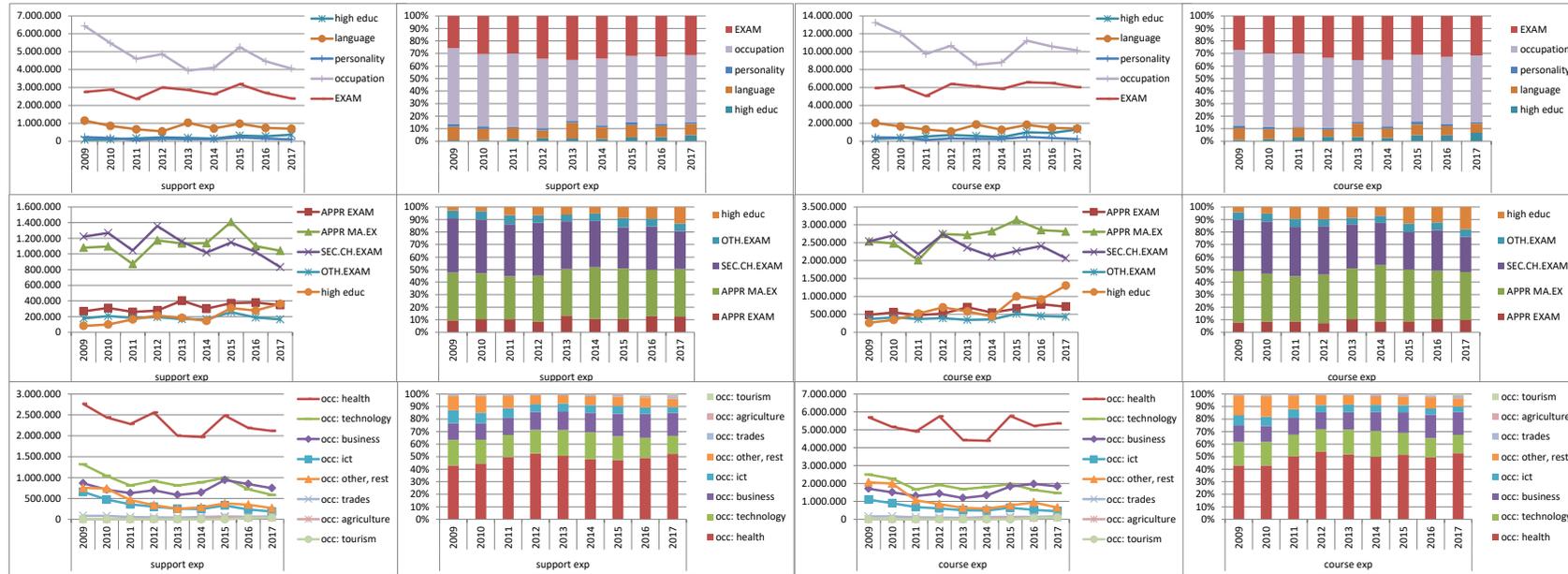


Applications, course participation, support and course expenditure by course type

a) applications and course participation by course type

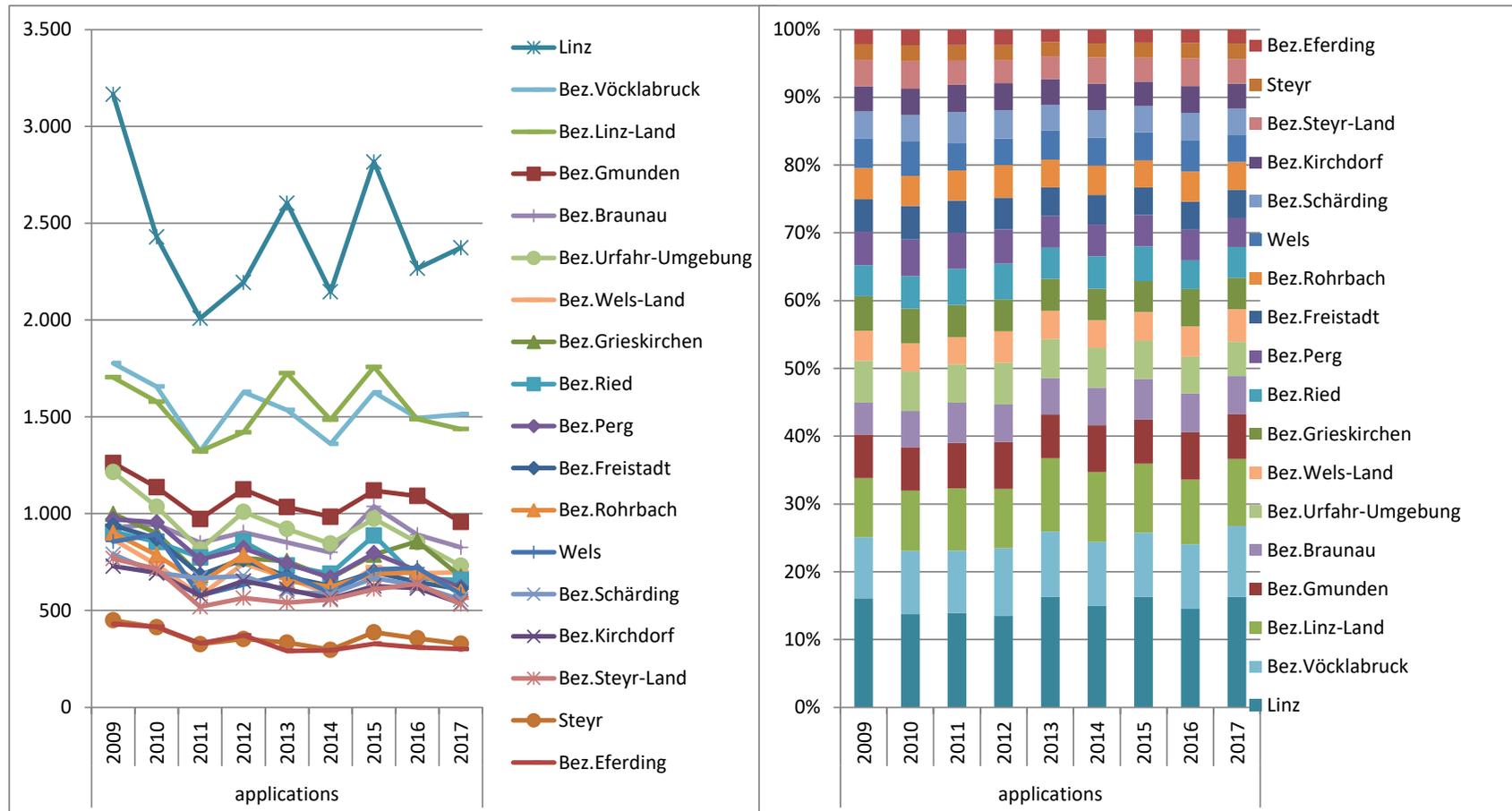


b) support and course expenditure by course type

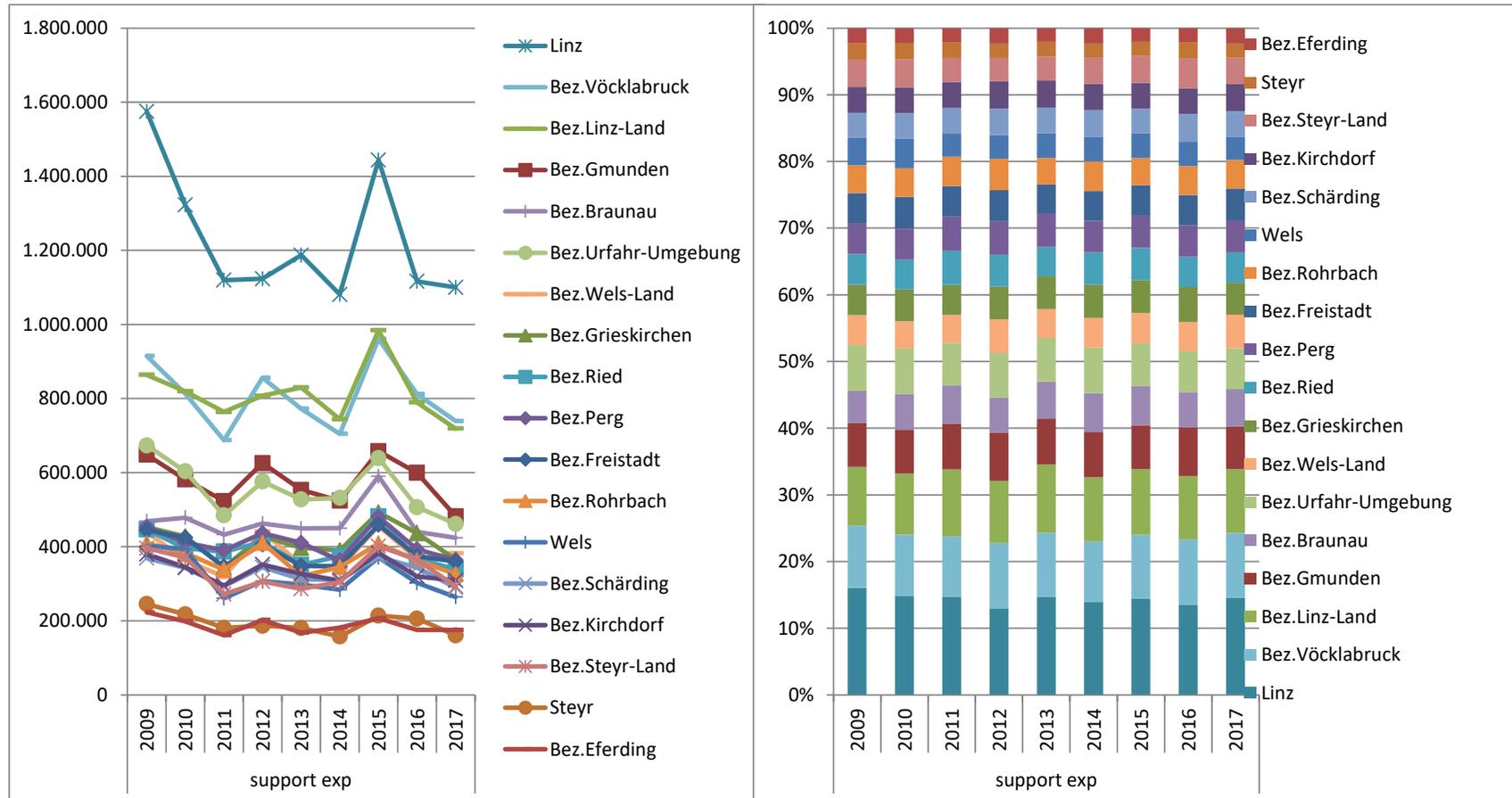


Applications, course participation, support and course expenditure by sub-regions

a) participation (ordered by participation size 2017, left: top to bottom, right: bottom to top)

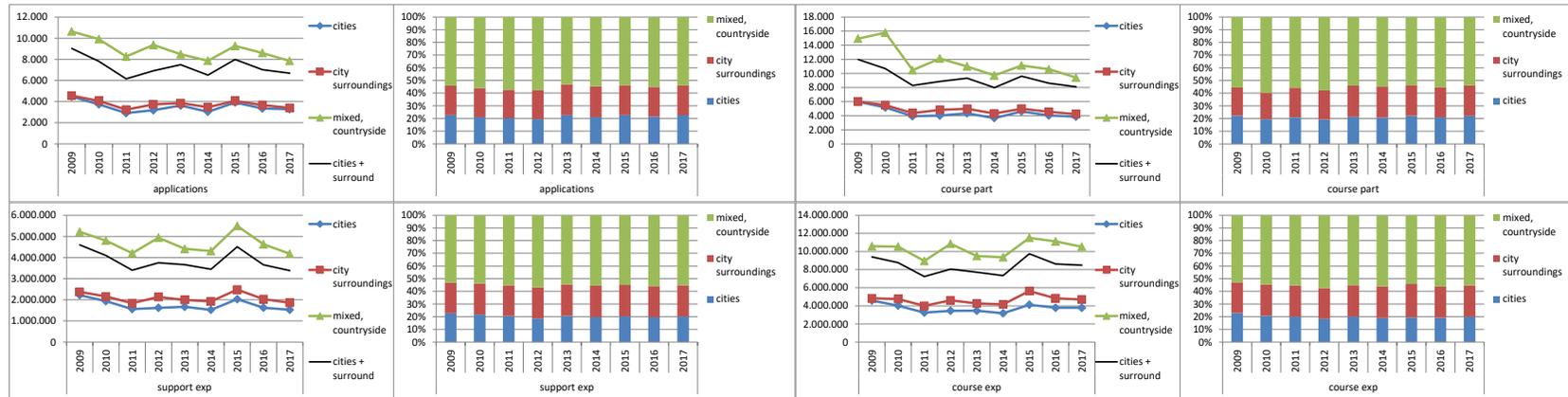


b) support expenditure



Ordered by size of participation 2017, left: top to bottom, right: bottom to top

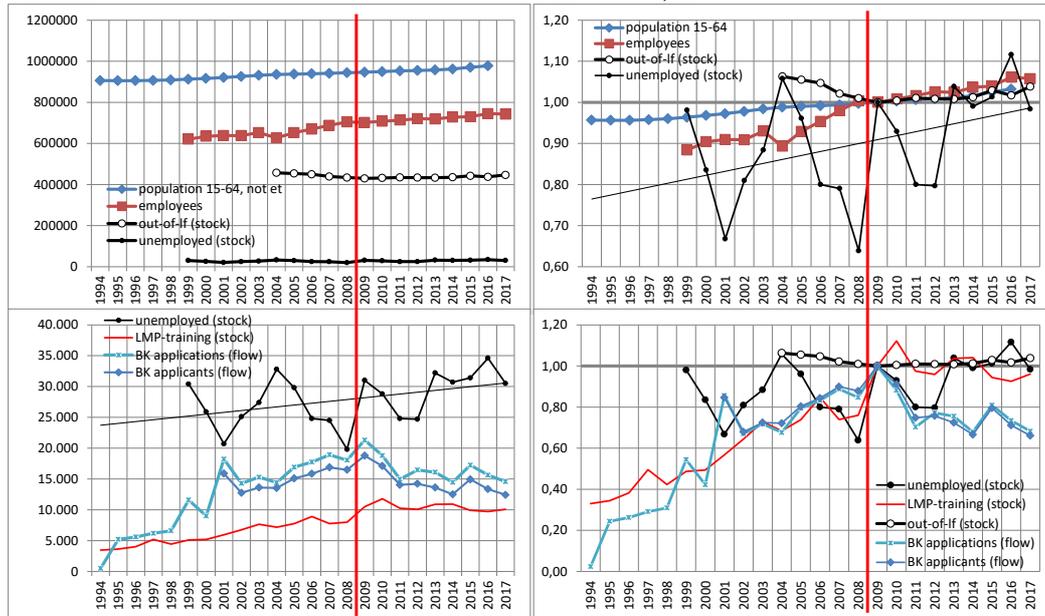
c) Applications, course participation, support and course expenditure by urban-rural sub-regions



7.5 Context data

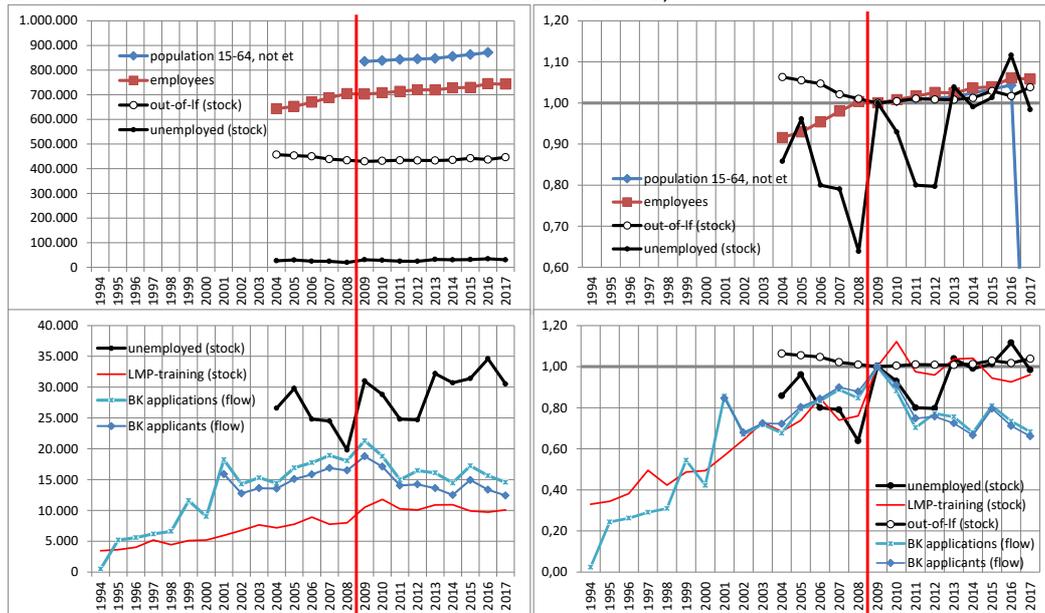
Figure 37: Context data from different sources: OECD labor statistics, Austrian LFS and employment statistics

a) OECD-data: Population 15-64y, employees, unemployed, out-of-lf (upper panel) unemployed, labor market training stock-data, Bildungskonto applications, applicants flow-data (lower p.) absolute index 2008=1,00



Source: Authors figure based on OECD regional statistics (population, employees), LFS (out-of-labor-force), AMS (LMP training), documentation by administrative unit 2001-2008, and Land OOE 2009-17 (Bildungskonto)

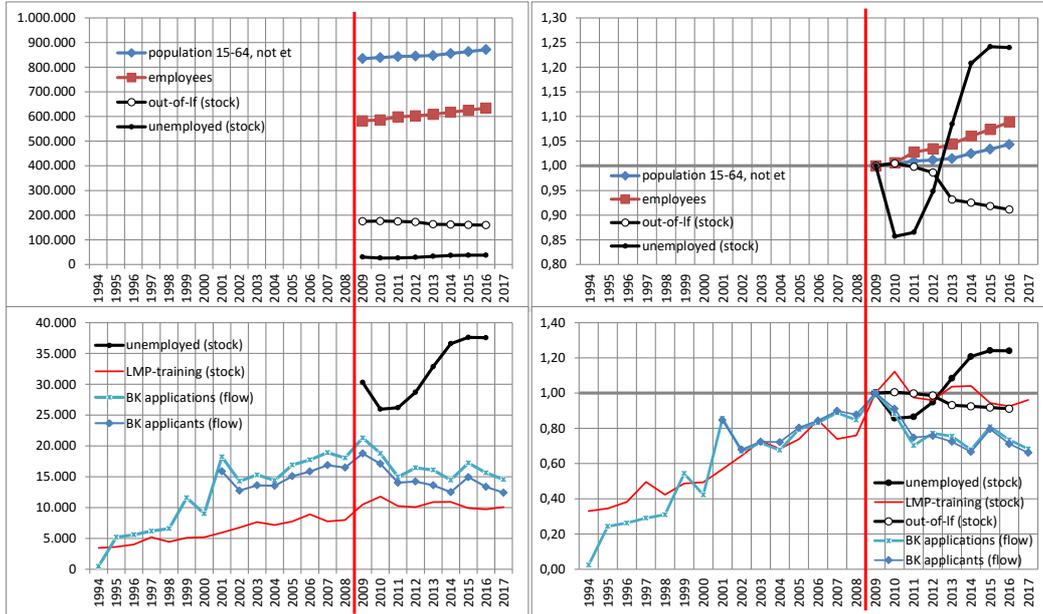
b) EU-LFS-data: Population 15-64y not in education and training, employees, unemployed, out-of-lf (upper) unemployed, labor market training stock-data, Bildungskonto applications, applicants flow-data (lower p.) absolute index 2008=1,00



Source: Authors figure based on LFS 2004-16, documentation by administrative unit 2001-2008, and Land OOE 2009-17

c) Austrian-data: Population 15-64y not in education and training, employees, unemployed, out-of-lf (upper panel)

unemployed, labor market training stock-data, Bildungskonto applications, applicants flow-data (lower p.)
absolute index 2008=1,00



Source: Authors figure based on employment statistics (Abgestimmte Erwerbsstatistik) 2009-16, documentation by administrative unit 2001-2008, and Land OOE 2009-17

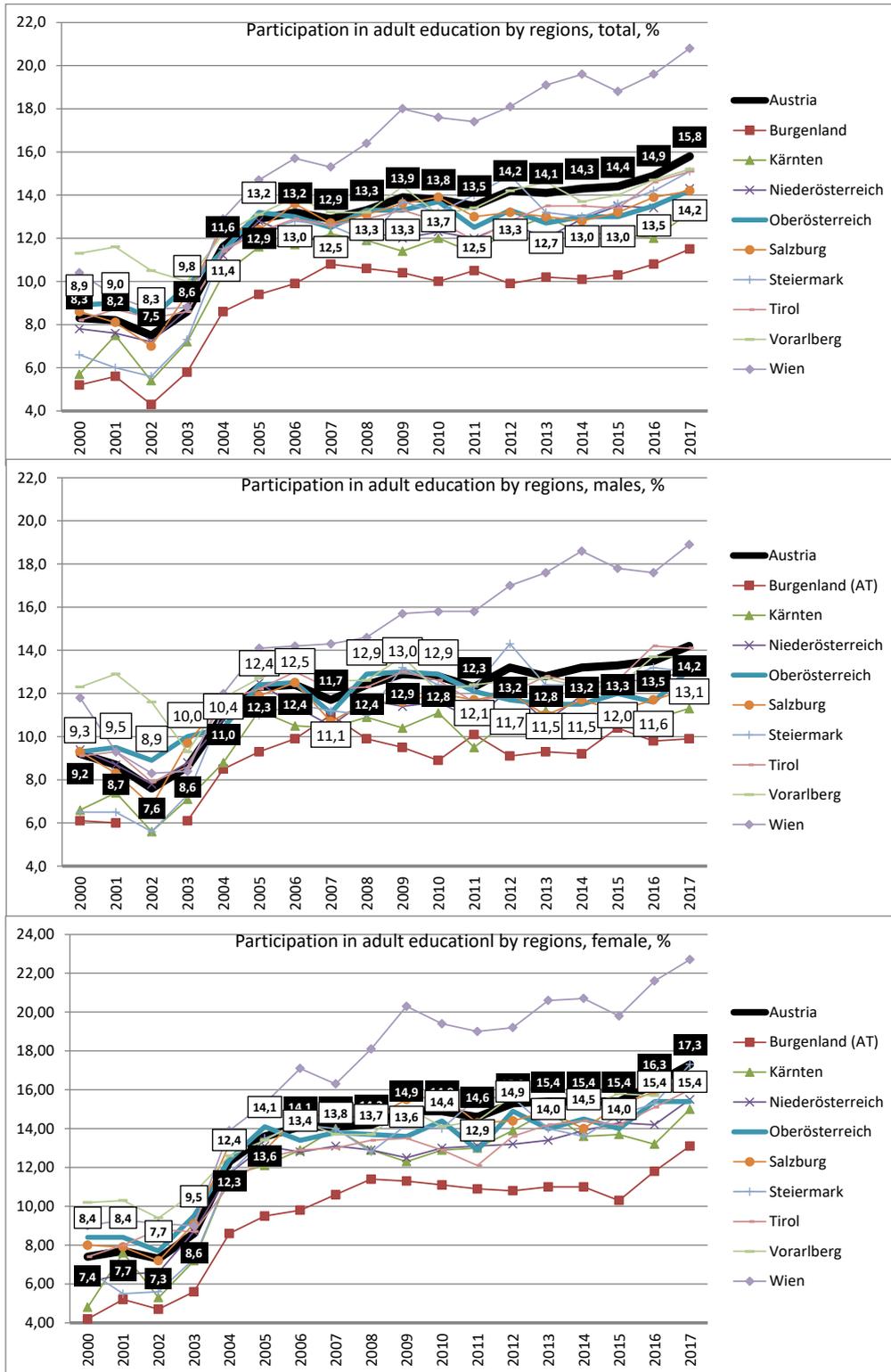
7.6 LFS-Indicator: participation in adult education last four weeks broken down by Austrian regions

Participation rate in education and training (last 4 weeks) by NUTS 2 regions, 25 to 64 years

	Total	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total	AT	8,3	8,2	7,5	8,6	11,6	12,9	13,2	12,9	13,3	13,9	13,8	13,5	14,2	14,1	14,3	14,4	14,9	15,8
	B	5,2	5,6	4,3	5,8	8,6	9,4	9,9	10,8	10,6	10,4	10,0	10,5	9,9	10,2	10,1	10,3	10,8	11,5
	K	5,7	7,5	5,4	7,2	10,3	11,6	11,7	12,2	11,9	11,4	12,0	11,3	12,4	13,0	12,2	12,2	12,0	13,2
	N	7,8	7,6	7,2	8,7	11,2	12,8	12,1	11,8	12,3	12,0	12,3	12,0	12,7	12,0	12,9	13,5	13,4	14,3
	O	8,9	9,0	8,3	9,8	11,4	13,2	13,0	12,5	13,3	13,3	13,7	12,5	13,3	12,7	13,0	13,0	13,5	14,2
	S	8,6	8,1	7,0	9,4	12,5	12,4	13,6	12,7	13,1	13,6	13,9	13,0	13,2	13,0	12,8	13,2	13,9	14,2
	St	6,6	6,0	5,6	7,3	11,5	12,3	12,8	12,6	11,9	13,7	13,2	14,0	14,9	13,2	13,0	13,6	14,2	15,1
	T	8,2	8,7	8,3	8,6	11,4	12,3	12,9	12,6	12,9	13,3	12,8	11,9	12,8	13,5	13,5	13,4	14,6	15,1
	V	11,3	11,6	10,5	10,0	12,2	13,1	13,9	13,2	13,2	14,4	13,1	13,4	14,2	14,6	13,7	14,0	14,7	15,2
W	10,4	9,3	8,7	8,8	12,9	14,7	15,7	15,3	16,4	18,0	17,6	17,4	18,1	19,1	19,6	18,8	19,6	20,8	
Male	AT	9,2	8,7	7,6	8,6	11,0	12,3	12,4	11,7	12,4	12,9	12,8	12,3	13,2	12,8	13,2	13,3	13,5	14,2
	B	6,1	6,0	6,1	8,5	9,3	9,9	11,0	9,9	9,5	8,9	10,1	9,1	9,3	9,2	10,4	9,8	9,9	
	K	6,6	7,4	5,6	7,1	8,8	11,2	10,5	10,4	10,9	10,4	11,1	9,5	10,8	11,2	10,7	10,7	10,8	11,3
	N	9,4	8,7	7,8	8,8	10,8	12,5	11,4	10,5	11,7	11,4	11,6	10,8	12,2	10,7	11,9	12,7	12,5	13,2
	O	9,3	9,5	8,9	10,0	10,4	12,4	12,5	11,1	12,9	13,0	12,9	12,1	11,7	11,5	11,5	12,0	11,6	13,1
	S	9,3	8,3	6,8	9,7	11,7	11,9	12,5	10,7	11,6	11,6	12,0	11,7	12,0	11,0	11,7	11,2	11,7	12,2
	St	6,5	6,5	5,6	7,3	11,3	11,0	11,5	11,2	11,0	13,2	12,4	12,3	14,3	12,4	12,4	12,6	13,2	13,0
	T	9,1	9,3	7,9	8,6	11,7	12,2	13,0	12,2	12,3	13,0	12,6	11,6	12,0	12,8	12,5	12,6	14,2	14,1
	V	12,3	12,9	11,6	9,3	11,8	12,7	13,3	12,6	12,6	13,7	12,1	12,4	12,6	12,7	12,3	12,3	13,7	13,7
W	11,8	9,3	8,3	8,4	12,0	14,1	14,2	14,3	14,6	15,7	15,8	15,8	17,0	17,6	18,6	17,8	17,6	18,9	
Female	AT	7,4	7,7	7,3	8,6	12,3	13,6	14,1	14,1	14,2	14,9	14,9	14,6	15,3	15,4	15,4	15,4	16,3	17,3
	B	4,2	5,2	4,7	5,6	8,6	9,5	9,8	10,6	11,4	11,3	11,1	10,9	10,8	11,0	11,0	10,3	11,8	13,1
	K	4,8	7,6	5,3	7,2	11,6	12,1	12,9	14,0	12,9	12,3	12,9	13,0	13,9	14,9	13,6	13,7	13,2	15,0
	N	6,1	6,5	6,6	8,7	11,7	13,1	12,8	13,1	12,9	12,5	13,0	13,1	13,2	13,4	13,9	14,3	14,2	15,5
	O	8,4	8,4	7,7	9,5	12,4	14,1	13,4	13,8	13,7	13,6	14,4	12,9	14,9	14,0	14,5	14,0	15,4	15,4
	S	8,0	7,9	7,2	9,1	13,2	12,9	14,7	14,7	14,5	15,5	15,7	14,3	14,4	14,9	14,0	15,2	15,9	16,1
	St	6,7	5,5	5,6	7,3	11,7	13,5	14,2	14,0	12,8	14,2	14,0	15,6	15,6	14,0	13,6	14,7	15,3	17,3
	T	7,4	8,0	8,8	8,7	11,1	12,5	12,9	13,0	13,4	13,5	12,9	12,1	13,6	14,2	14,4	14,2	15,1	16,0
	V	10,2	10,3	9,4	10,7	12,6	13,4	14,4	13,7	13,7	15,1	14,1	14,4	15,7	16,5	15,1	15,8	15,7	16,7
W	9,0	9,3	9,1	9,0	13,9	15,3	17,1	16,3	18,1	20,3	19,4	19,0	19,2	20,6	20,7	19,8	21,6	22,7	

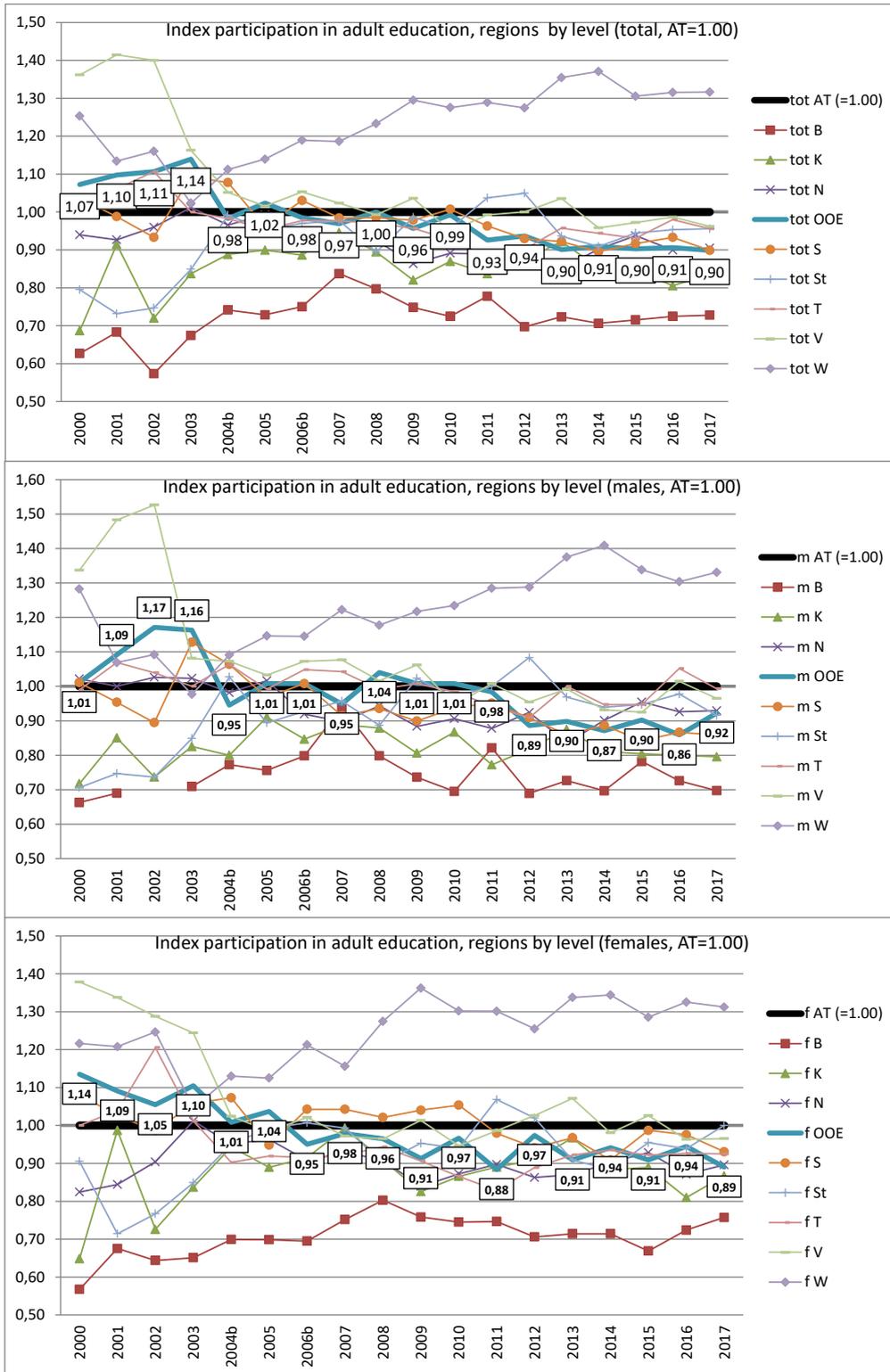
Source: EUROSTAT [trng_lfse_04]

Participation rate in education and training by regions, total, male, female, %



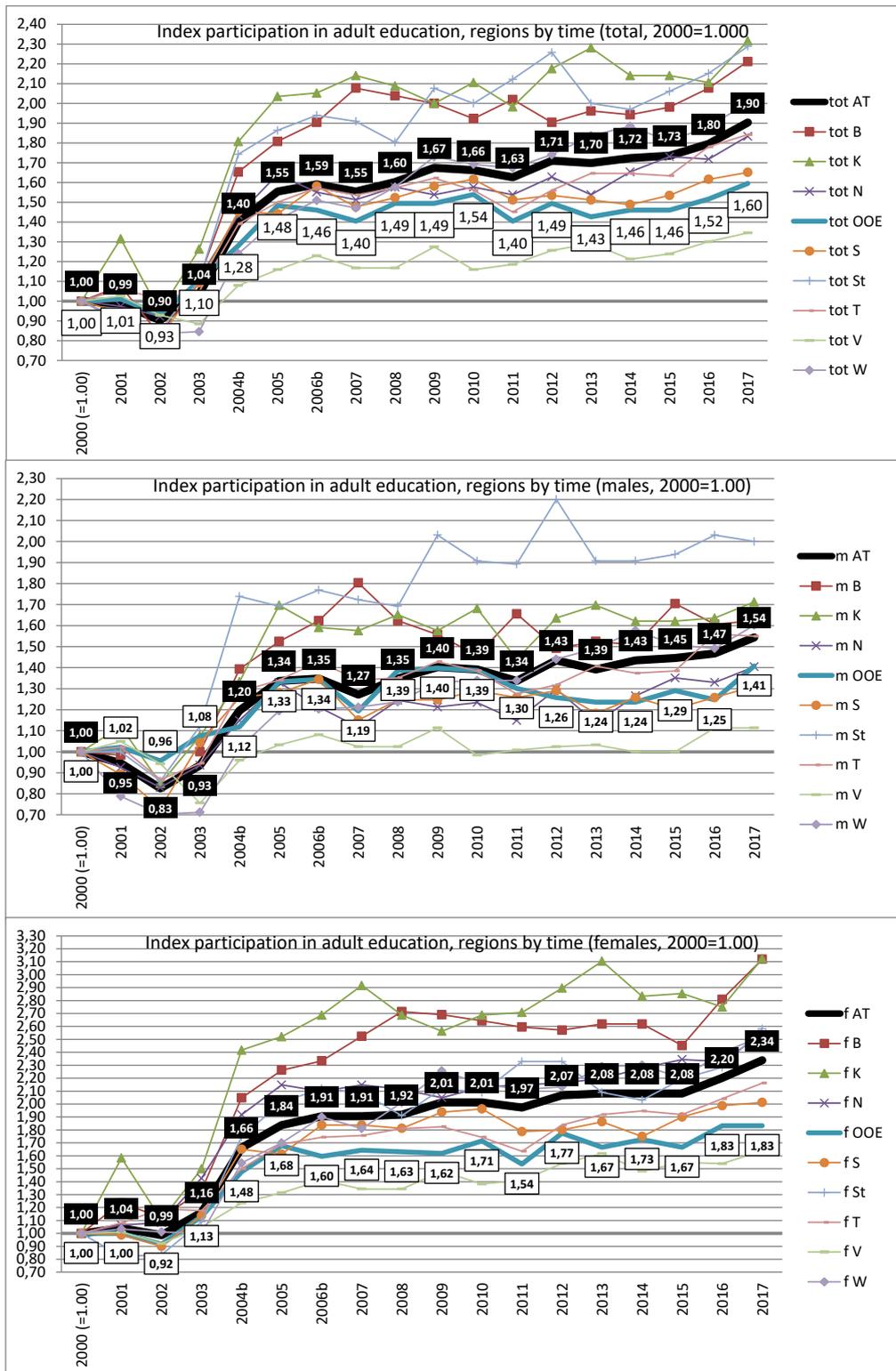
Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

Participation in adult education, total, m, f, 2000-17, regions



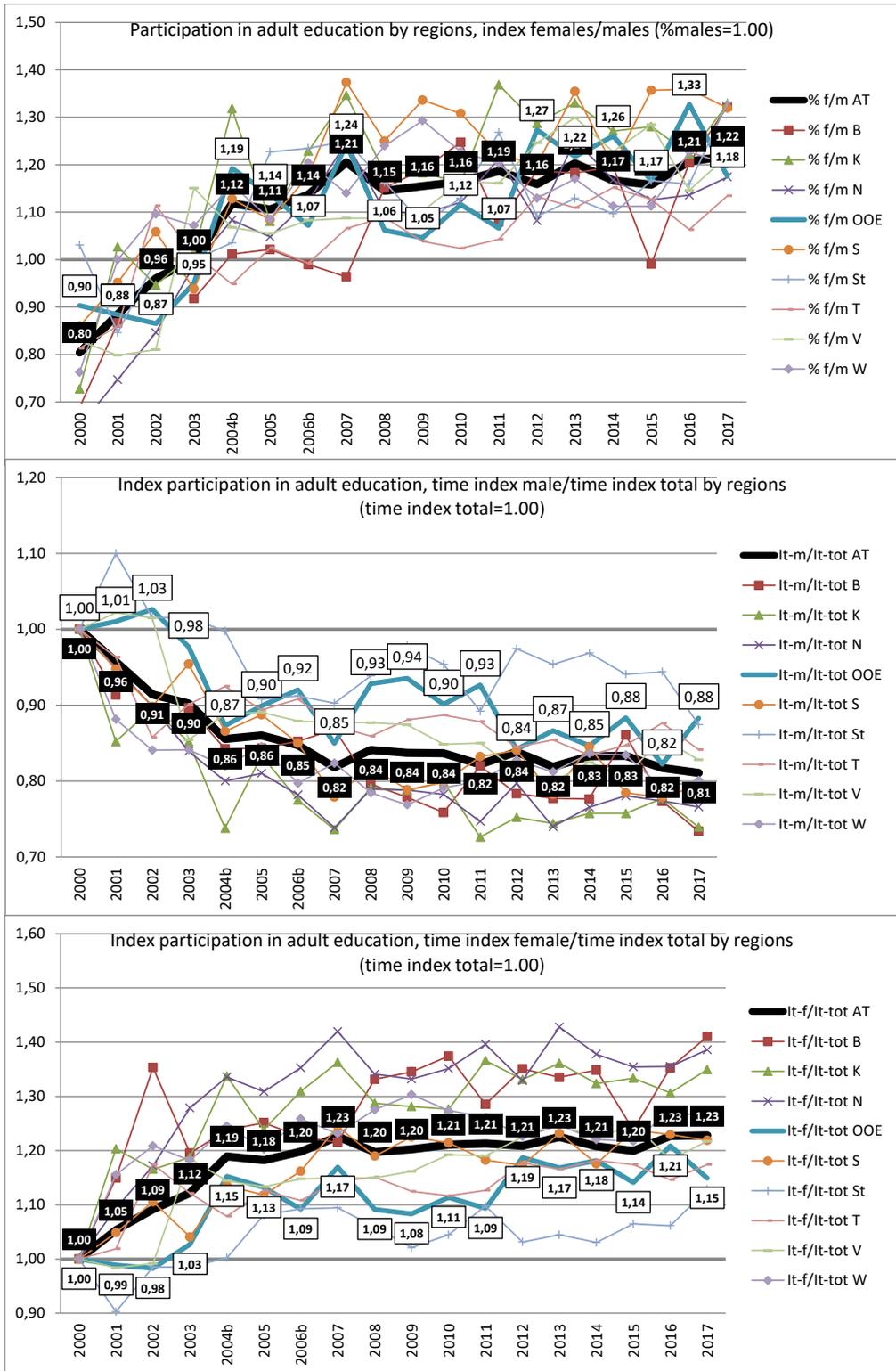
Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

Index time, 2000=1.00



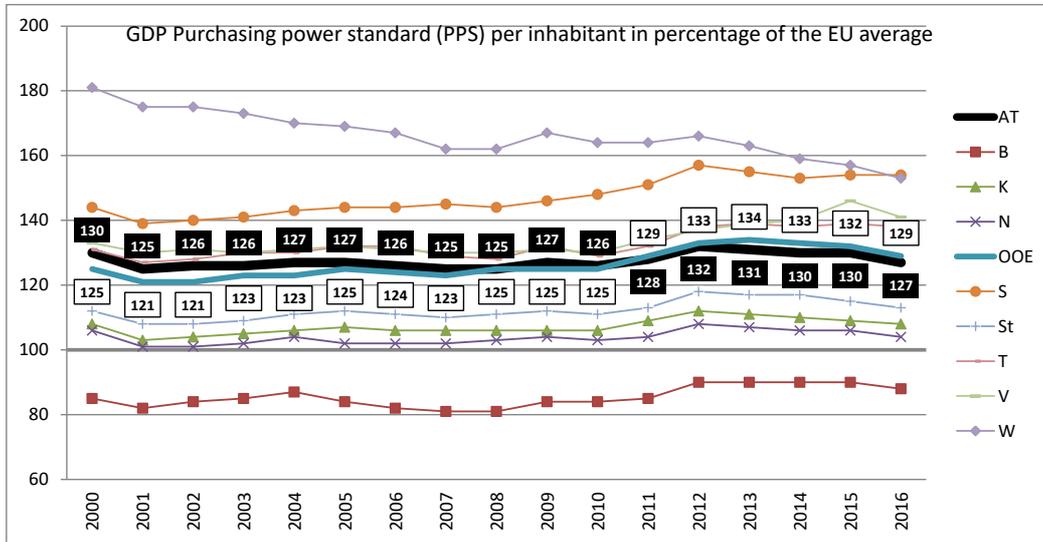
Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

Index f/m, m,f by total time index



Source: Authors figure based on EUROSTAT Participation rate in education and training (last 4 weeks) by NUTS 2 regions [trng_lfse_04]

7.6.1 GDP per capita, Austrian regions



7.7 Overview about account-type schemes in Austria (see legend below table)

	B1	K1	K2	K3	K4	N1,3	N2	N4	O1	S1	S2	St1	T1	T2	T3	T5	T6	V1	V2	W1,2	W3	W4	W5	W6
Characteristics of schemes																								
2004-07	voc or	diff. list ³	entpr list trades ⁴			La,IT, 2 nd ch	health loan		voc or	voc or		voc or	voc	inc supp	voc loan			inc supp	voc upd	voc or	wom upgr	unq upgr		
2018-19	lm or, future ¹			sust. voc	wom fund	voc or IT qual		upgr rec	voc or	cont.	APPR Ma	voc or	list div ⁶	cont.		add to qu.gr	voc upgr	inc supp	voc upd	cont	wom change	upgr rec	occ upgr	entpr SME
Target groups																								
2004-07	EMP UE APPR SERV RET	EMP	EMP med. qual. or higher			EMP CH.C RET WF	EMP min 1y before appl		EMP UE RET 40+ UNQ GERF 1PE HE ⁵	EMP low-med-qual RET		APPR APPR. C	EMP UE RET EdL SENT3	EMP 6 mo RET	EMP 6mo RET UE EdL	rec of qual. grant		EMP 1y	RET	EMP UE WF RET SERV NSE W2 +APPR. C 2y +APPR. RET	womE MP low-med-qual	UNQ MIGR 40+ RISK		
2018-19	EMP +GERF +EdL UE APPR SERV RET			EMP +FREEL RET	wom seek emp if no oth meas	EMP full +publ RET		UNQ MIGR +1PE	EMP UE RET 50+ ⁵ UNQ GERF 1PE SENT5	EMP +FREEL +GERF UE WF APPR RET EdL SENT5	add to S1	APPR APPR. C	EMP +FREEL APPR +publ RET SENT9	EMP 6 mo RET		UNQ MIGR +1PE		EMP 1y EU 6mo Above GERF reg bel HE	RET	EMP UE WF APPR RET NSE W2 +APPR. C 2y	wom EMP for occ change	UNQ	EMPL APPR GERF	EMPL ft male max 45y appr.c
Income limits																								
Income limit									only HE					inc. red 25%+				inc. red not spec						
Indiv. Inc. ²	2004-07	mgro 2.345+				mgro 3.000			only 50+															
fam. Inc.	2018-19	3.028		ygr 30.000														Mgr 3.700				mnet 1.800	mnet 1.800	
	2004-07	3.752						l. dep.on fam inc																
	2018-19	4.844												not spec										

		B1	K1	K2	K3	K4	N1,3	N2	N4	O1	S1	S2	St1	T1	T2	T3	T5	T6	V1	V2	W1,2	W3	W4	W5	W6	
Minimum cost or duration required																										
	2004-07 2018-19		180	220 8 hr	20 un		70			100	200		200	150	15 hr 2 mo till 3y			75	ft 1 sem 30hr 4 mo	50 hr	75			200		
Support variants																										
fee	2004-07	75% max.m 364	min.40 € max.y 546	up to 70%			50% emp, ch.c 80% max.6y 2.640	loan.m 150- 175 6y repay		50% 760 gen 1.560 exam 80% 1.180 40+ 1.960 UNQI	50% 730 gen 365 Mat		50% max.r 500	basic:: 25% max.c 500 plus 15% max.c 300 exam cost 500+			80% max.c 4.000 3y repay			50% max.y 2.000	50% max.c 200 gen 50% 300 UE, WF,RE T, EdL 80% 450 2 nd ch, appr. m	90% max.r 3.700	70% 1.000 gen 90% 1.100 UNQ 90% 2.000 APPR. C			
	2018-19	75% 2 nd ch, future 75% max.c 1.500 RET 60% APPR.c 50% max.c 1.000 Overall max.y 4.000			50% gen 75% appr, ret Overall max.5y 2.500	max.r 2.500	mgro 1.500 80% 2000 60% 3000 40%		90% 3.000	30% 2.000 gen 60% 2.400 UNQ REC RET 50+ GER 1.000 La	50% gen 75% Unq max.4y 900 gen 1.300 50+ 2.000 UNQ upgr health IT (200hr)		50% max.r 500	basic 30% max.5y 3.000 plus bonus 20% Exam cost 500+			60% max.c 4.800	90% max.r 3.000 var by att: full 75% lower less		50% max.y 5.000	50% +200 50% max.c 300 W2 +300	90% max.r 3.700	90% max.r 1.000 gen 90% 3.000 rec, occ health, ped 90% 3.000 +10% APPR. C	mnet 1.400 50% 1.600 405 1.800 30% max.r 2.000	50% max.r 1.000 max.e ntpr 20.000	

		B1	K1	K2	K3	K4	N1,3	N2	N4	O1	S1	S2	St1	T1	T2	T3	T5	T6	V1	V2	W1,2	W3	W4	W5	W6
Inc.	2004-07		max.m 546, incl. fee												no inc. 100-300 max.m 600 inc. red 20-30% of red 4y emp 35% red max.m 350 less 4y 30% red 300 ret 150				max.m 250 max.y 2.500						
	2018-19					urgent or no fee: max.m 250													max.y 2.750						
Other	2004-07											exam 100% ind.ma max 250								exam, lit, acc, transp incl	exam incl.				
	2018-19				exam 50% from 50	cost child care			exam 90%					exam if incl. in fee						exam	exam incl.			exam incl.	exam incl.
Counseling required																									
	2004-07					mand																			
	2018-19								mand+ed.pl									mand+ed.pl					mand+ed.pl	mand	mand
Application and payment periods																									
Application	2004-07	2 mo aft		by entpr	6 mo aft		12 mo aft		3 mo aft	3 mo aft	6 mo aft	3 mo aft	3 mo aft	2 mo aft beg	bef beg			3 mo aft	3 mo aft	3 mo aft	bef				
	2018-19	4 mo aft					13w bef-2w aft beg		6 mo aft	3 mo aft	6 mo aft	6 mo aft	3 mo aft	2 mo aft beg	bef till 2w aft beg	bef till 2w aft beg	bef till 4w aft beg		3 mo aft	3 mo aft	3 mo aft	bef		bef	bef
Payment	2004-07									50% appl 50% aft					bef							aft			
	2018-19						30% beg 70% aft			10% by rec 90% by gov			3 mo aft	3 mo aft			50% beg 50% aft	parts poss				aft		parts poss	

Explanations and legend to table

-Target groups

1PE=One-person enterprise
40+ =age 40y or more
50+ =age 50y or more
APPR= apprentices
APPR.C=apprenticeship certificate completed
APPR.C 2y= apprenticeship certificate completed within last 2 years
bel HE=below higher education
CH.C= in child care
EdL=educational leave
EMP=employees
EMP 1y EU 6mo=employees employed minimum 1 year in EU
EMP 6 mo=employees employed for at least 6 months
EMP ft=full time employees
EMP low-med-qual=low or medium level qualified employees
FREEL= free-lance service contract
GERF= geringfügig, marginal employees
med. qual. or higher=persons with medium or higher level qualification
MIGR=migrants with qualifications not recognized
NSE=new self-employed
Publ=public employees
RET=returners from child care or other care responsibilities, includes also persons in maternity leave
RISK=persons at risk of losing job
SENT3=small enterprises with max.3employees
SENT5=small enterprises with max.5employees
SENT9=small enterprises with max.9employees
SERV=persons in civil or military service
UE=unemployed
UNQ=persons without qualifications
WF=welfare recipients
Wom=women

-Income

mgr, ygr=monthly, yearly gross €
mnet=monthly net €

-Support variants

max.m=maximum amount € per month
max.c=maximum amount € per course
max.r=maximum amount € per recipient
max.ny=max amount € per n years
specified for target groups, or gen=general

Documentation of schemes 2018-19

B1	Qualifikationsförderungszuschuss des Landes Burgenland CONT.	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10889
K3	Kärnten: Bildungsförderung des Landes	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10888
K4	Kärnten: Frauenbildungsfonds	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10837
N1	NÖ: Bildungsförderung Neu CONT.	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10907
N3	NÖ Bildungsförderung: Sonderprogramm „Arbeitswelt 4.0 - Fit für Digitalisierung“	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=11203
N4	NÖ: Bildungsförderung - Sonderprogramm NÖ Weiterbildungsscheck	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10912
O1	Bildungskonto des Landes OÖ CONT.	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10838
S1	Bildungsscheck des Landes Salzburg CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10895
S2	Sbg: Meister-Scheck	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10909
St1	Steirischer Bildungsscheck für Lehrlinge und LehrabsolventInnen CONT.	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10894
T1	Tiroler Bildungsförderung - Bildungsgeld update CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10890
T2	Tiroler Bildungsförderung – Ausbildungsbeihilfe	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10869
T5	Tiroler Bildungsförderung – Fachkräfteförderung	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=11514
T6	Tiroler Bildungsförderung - Weiterbildungsbonus Tirol	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=12451
V1	Vlbg: Bildungszuschuss: Bildungskonto CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10844
V2	Vlbg: Bildungszuschuss: Startkapital CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10847
W1	Wien: waff Bildungskonto für alle CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10892
W2	Wien: waff Bildungsbonus CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10893
W3	Wien: waff FRECH CONT	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10872
W4	Wien: waff Chancen-Scheck	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=10903
W5	Wien: waff Bildungskonto für umfangreiche Weiterbildungen	https://erwachsenenbildung.at/bildungsinfo/kursfoerderung/details.php?id=11881
W6	Wien: waff Fachkräftequalifizierung	http://www.bildungsfoerderungen.at/details.php?uid=306

8 REGISTERS

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<https://www.help.gv.at/Portal.Node/hlpd/public/content/207/Seite.2070002.html>

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