



Mapping of the COMPASS survey

Version 2 | September 2022

Moldova Country Profile 2022

**Complementary report to the initial analysis
undertaken in 2018**

Report prepared by **eucen**

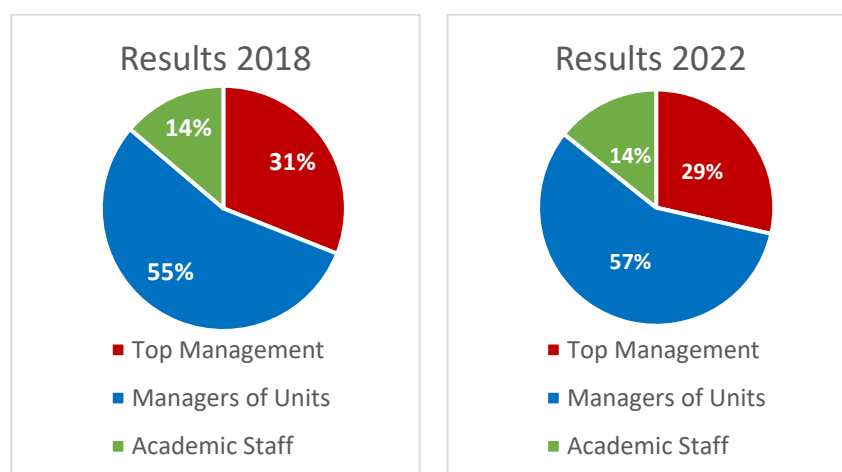


European University
Continuing Education Network

1. INTRODUCTION

The questionnaire was distributed amongst HEIs in Moldova in early 2022. COMPASS received seven questionnaires back from six different universities, all of which had also replied to the first questionnaire distributed in 2018. It is therefore possible to draw a direct comparison between the state of ULLL at these institutions at the start and the end of the project timeline.

Regarding the roles or positions which the individuals who completed the survey hold within their universities, two answers were submitted by university top managers (Rector, Vice-Rector), four answers were submitted by managers (Directors or Heads of department) and one answer came from a professor/academic staff member. Respondents' profiles were proportionally very similar to those who replied to the survey in 2018, as is illustrated below in the two diagrams comparing the distribution of respondents' roles in 2018 and 2022.



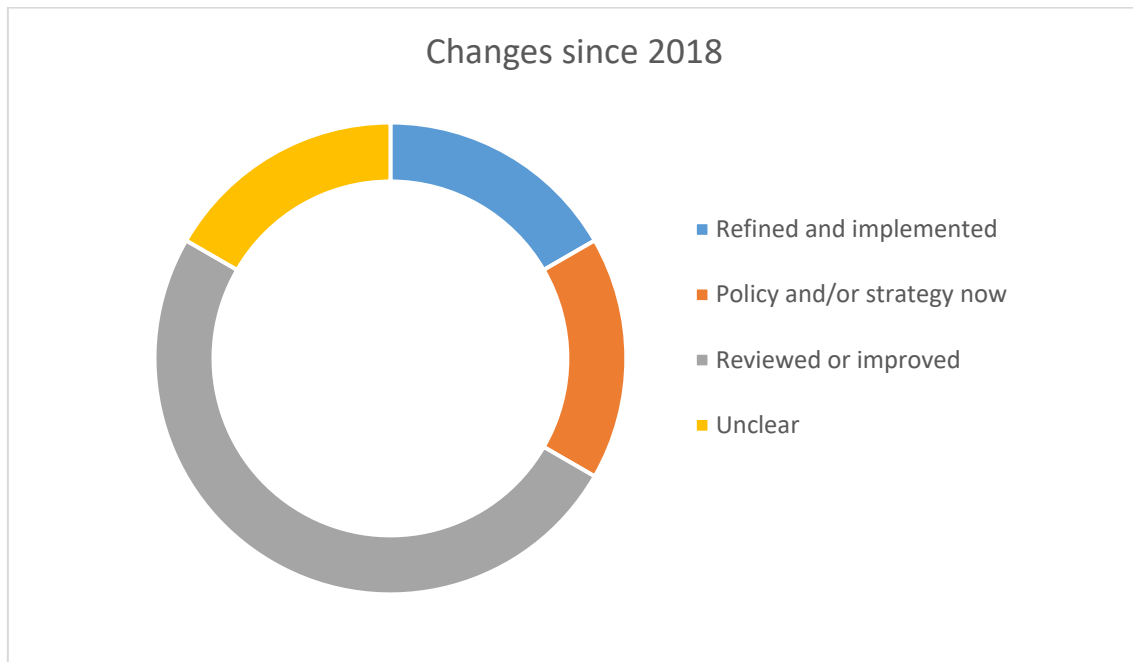
Trends

The number of collected questionnaires in 2022 is a very small sample to conduct a deep analysis of the overall state of ULLL in Moldova. Based on our experience of implementing the initial questionnaire in 2018, for the 2022 survey, we encouraged representatives of each participating university to work together as a group and to jointly submit one questionnaire per university, in order to avoid significant discrepancies between answers submitted by the same institution. All but one of the participating HEIs heeded our advice and submitted one questionnaire each. Therefore, even though the number of collected questionnaires in 2022 is smaller, the answers arguably provide a more accurate and unequivocal picture of the situation at each institution compared to the 2018 survey.

2. STRATEGY/POLICY FOR ULLL

A. Current policies and strategies

The survey asked respondents to clarify if and how their institution's ULLL policy or strategy has changed since November 2018 (when the first survey was completed). All the answers that were submitted indicate that the participating institutions have improved their policies and strategies connected to ULLL since the project has started.



As the above figure illustrates, out of the five participating institutions that submitted one questionnaire each, the most common answer (selected by three respondents) was that their institution already had a policy or strategy in place in 2018, but that the COMPASS project gave them the opportunity to review or improve it. One institution stated that their policy was not fully implemented in 2018, and that in the last year they had refined it and started to implement it, and another institution stated that they did not have a policy and/or strategy in 2018, but that they have since implemented one.

Interestingly, the two questionnaires submitted by the same institution did not concur on this point (and are therefore marked as "unclear" in the graph), with one respondent indicating that they already had a ULLL policy or strategy in place at the beginning of the project, which has since been reviewed or improved, whilst the other stated that their institution did not have such a policy or strategy in place at the beginning of the COMPASS project, but that they now do. This discrepancy illustrates how even on questions as fundamental as whether a ULLL policy or strategy was in place, or when it was implemented, staff members from the same institution do not always agree with each other. Whether this is due to a lack of awareness or understanding of ULLL within institutions, or due to insufficient communication and exchange between members from different departments can only be guessed. However, it suggests that we should treat the data collected from such questionnaires with caution, and should not be too quick at drawing conclusions based on them.

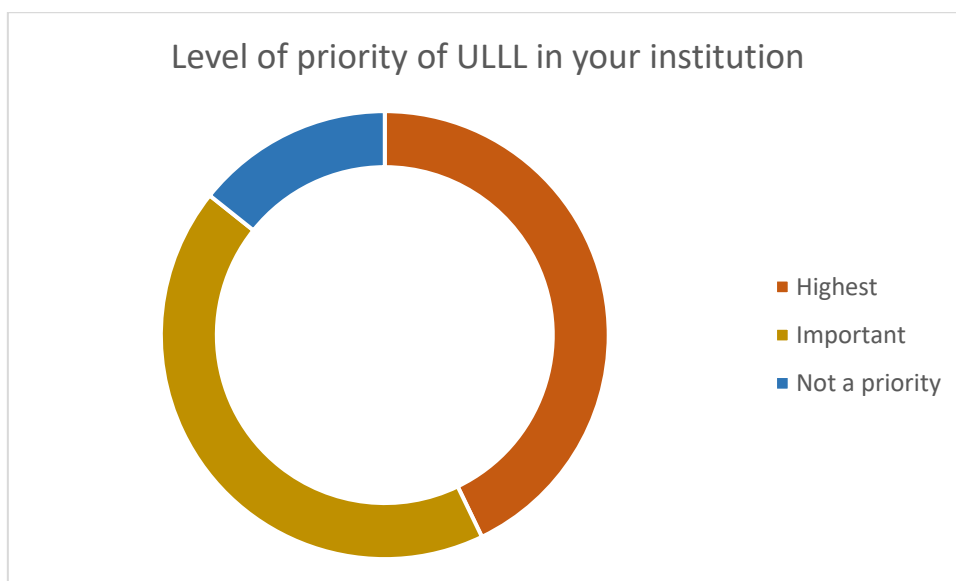
Respondents were asked to elaborate further on the changes to institutional policies and strategies that were brought about due to COMPASS. Two comments in particular shed light on the positive impact the project has had:

"ULLL policy and strategy have been adjusted to the framework requirements of contemporary society"

"The project has changed attitudes towards ULLL, as in the current conditions people often face the problem of obtaining additional education or retraining"

What these comments suggest is that there is a greater awareness of the importance of ULLL across institutions, and that better institutional frameworks to support ULLL have been developed since the project started. The project has evidently put into motion fundamental changes that could progressively improve the integration of ULLL in HEIs, if this work continues.

From the six universities that completed the questionnaire, five confirmed that ULLL is now their highest or one of their most important priorities, the exception being the institution that submitted two questionnaires – one describing ULLL as important, whilst the other stated that it was "not yet a priority". This is illustrated in the following graph.



All the universities confirmed that the COMPASS project has changed the way they perceived ULLL. Some of the comments include:

"The infrastructure has been improved of the ULLL process and developed the culture of ULLL formation"

"...staff understands better the aims of LLL, its prospective, its importance..."

"It has brought about a change in the paradigm of education (...) The offer of educational services has been modernized"

"The project has changed attitudes towards ULLL..."

When asked about the purpose of ULLL in their institutions, and the most important reasons for implementing ULLL programmes, the most frequently selected answer were "To promote our degree programmes" (indicated to be a very high priority by all but one universities) and "To increase the revenues of the institution" (selected as a very high or high priority by all but one respondents). By contrast, the least popular answer was "To respond to the employment needs of the labour market". This distribution of replies suggests that the participating HEIs have not yet fully succeeded in liaising with industry partners and in co-creating programmes with them in order to meet their needs. This represents an as of yet unrealised opportunity for development and growth: addressing the demands of the market could not only offer a

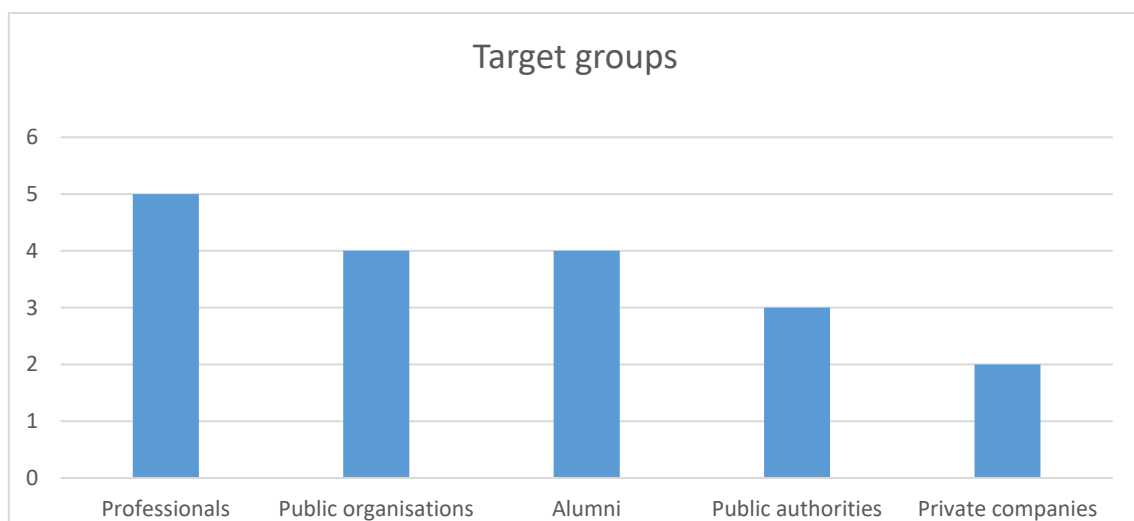
means for HEIs to promote their programmes, but would also provide an additional source of income. It is clear that this area merits further attention and work from Moldovan universities.

Regarding how participating institutions' LLL policy and/or strategy has changed since 2018, the submitted responses indicate that institutions are focusing on the interests of learners, that LLL is now an institutional priority, and that the COMPASS project has helped them to consider new target audiences and their needs.

B. Target groups

The received questionnaires indicate that professionals (selected by five respondents) followed by public organisations (selected by four) and alumni (also selected by four) are the groups that are mainly targeted through the ULLL activities undertaken by the answering institutions (see figure below). To a lesser degree, ULLL activities are also directed towards public authorities (selected by three).

Replicating the findings from the initial country profile conducted in 2018, the participating universities do not perceive NGOs, unemployed individuals, and special target groups as target audiences for their ULL strategy or policy. ULLL's potential as a means for universities to engage minority groups, such as people with disabilities and migrants, or to collaborate with NGOs or civil society in general evidently remains unrecognized. Thus, rather than acting as an instrument for social inclusion and empowerment, universities' lifelong learning activities may actually be reproducing already-present socio-economic inequalities.



However, when asked how their target groups have changed since 2018, some respondents indicated that their institution has diversified its target groups, and expanded its reach into a broader segment of society. Others stated that they have specialised in specific areas (such as management or accounting).

C. Recognised benefits of ULLL

The universities participating in the 2022 questionnaire indicated that the principal benefit that ULLL brings to their institutions is to attract new groups into their universities (this option was selected by five universities) and to increase the competitiveness of their teaching

and learning provision (selected by four). Unlike in 2018, they no longer see ULLL primarily as a means to attract funding or establish opportunities to benchmark international performance.

Promoting research, establishing European standards, and increasing prestige for their institutions were also not selected as benefits of ULL by many of the respondents. These are points that were perceived as more important at the beginning of the COMPASS project.

The respondents indicate that ULLL has increased the number of learners enrolled in their institution, and therefore increased their institution's income. They also estimate that their contacts and cooperation with other institutions have improved, and that the general interest in LLL training has grown since 2018. In general, it appears that universities consider the changes in ULLL approaches to have improved their situation.

D. Assessment

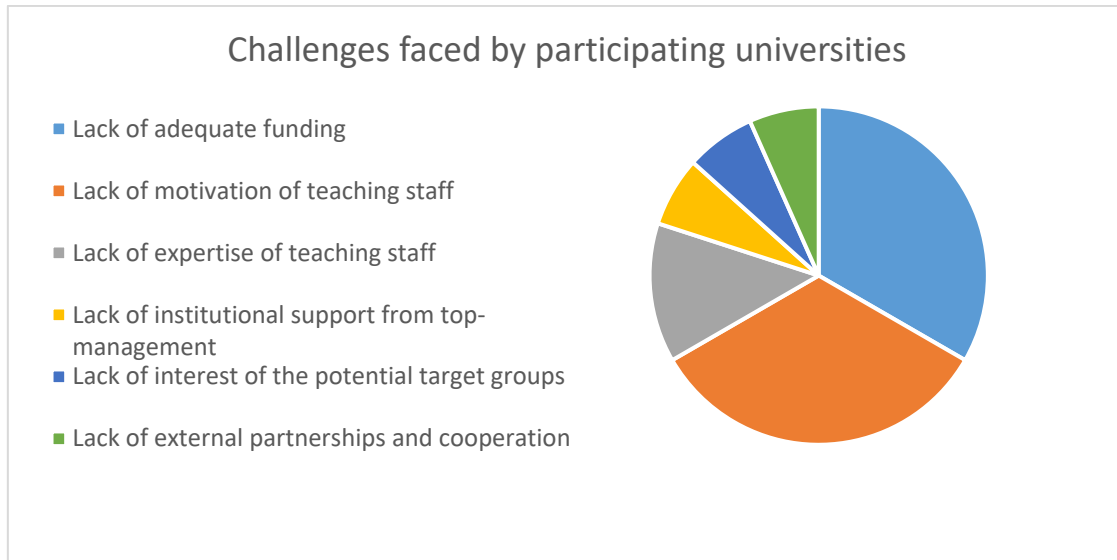
In comparison to the results obtained in the 2018 survey, the more recent survey paints an overall more promising picture regarding the assessment mechanisms through which universities in Moldova measure the impact or progress of their ULLL activities. Five of the six participating HEIs stated that they have such mechanisms in place, however, there is significant variation among institutions regarding the type of mechanisms they employ.

Four universities indicated that they conduct some form of survey, through which they gauge the satisfaction rates among the beneficiaries of their ULLL activities. Other mechanisms include internal auditing and measuring themselves against European standards. Only two of the participating universities registered a significant change in their assessment mechanisms, and a subsequent improvement in the quality of the ULLL activities they offer.

These results suggest that the development of new and/or better methods and techniques to evaluate ULLL is a long-term process, and that universities in Moldova are still in the early stages. This is best illustrated by the response provided by the university which does not (yet) have such mechanisms in place: according to the respondent, there was simply "not enough time" for these to be established.

E. Limitations

One area in which little appears to have changed since the beginning of the COMPASS project are the limitations which universities face when implementing ULLL. Similarly to the 2018 survey, the 2022 survey found that most (four out of six) universities continue to struggle with a lack of adequate funding and/or the high costs associated with running ULLL programmes, as the figure below illustrates.



However, it seems that now, a challenge of equal importance, is the lack of motivation among teaching staff, which was selected by five out of the six participating institutions. Although the challenge to motivate teachers was raised by respondents in the 2018 survey, it was not highlighted to the same degree as in the second survey. This suggests that while progress in ULLL strategies or policies have been made at the institutional level, attitudes among teaching staff lag behind. This may also relate to the lack of adequate funding for ULL activities, which is likely to affect teachers' salaries and therefore their levels of motivation.

An alternative explanation, offered by one respondent, was that teachers' "professional overtraining" may be at the root of their low levels of motivation. Contrasting with this, two other institutions indicated that their ULLL activities were impeded by a lack of expertise among teaching staff. Whether teaching staff is over or underqualified for teaching on ULLL programmes, what these results indicate is that there is a mismatch between teachers' skills or backgrounds and the teaching they are expected to undertake on ULLL programmes.

Promisingly, respondents' answers to the question of how the limitations to ULLL at their institution have changed since the beginning of the project address this issue to some extent. One institution reported that their teachers received in-service training courses as evaluators, whilst another noted that teachers have shown more interest in ULLL activities.

Other limitations, too, have been addressed over the course of COMPASS, with all but one respondent citing improvements in the regulatory framework, cooperation with partners, or technical equipment. A strong contrast emerged again between the two responses submitted by the same institution, with one indicating that a LLL centre has been established due to the COMPASS project, whereas the other replied that their institution faced the same limitations as at the beginning of the project.

F. Planned changes

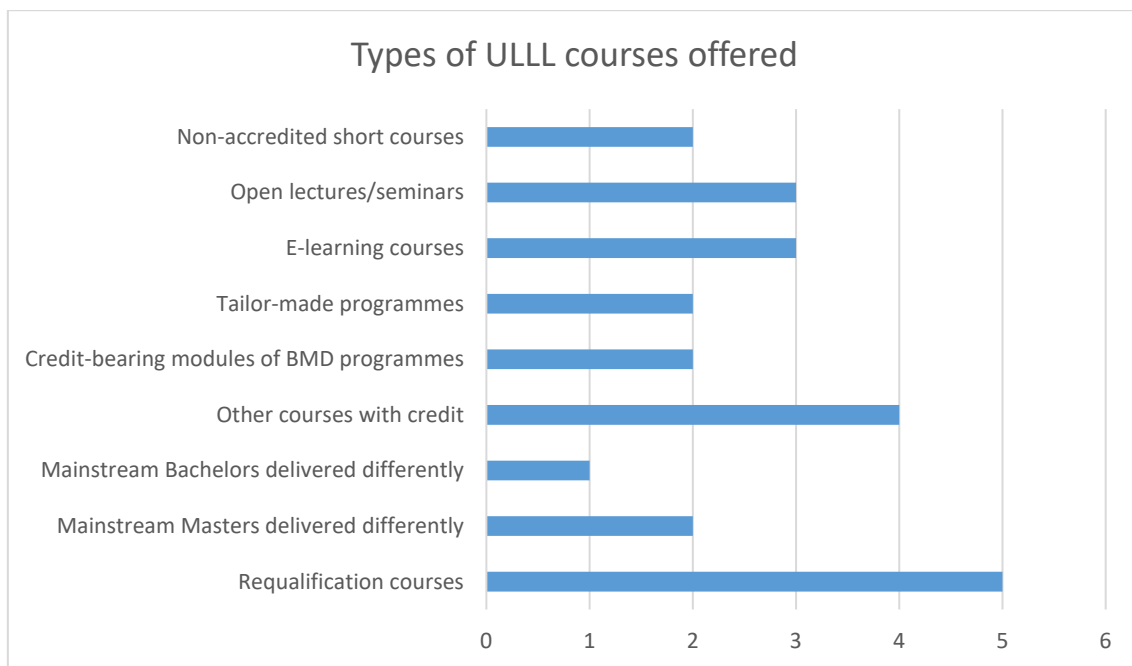
When asked about the planned developments in their institution's ULLL strategy or policy and activities in the coming three years, the only answer selected by all respondents was "changes in their promotional or marketing strategy".

In addition, according to the submitted questionnaires, all universities plan to undertake curriculum changes in their ULLL offering, whereas all but one university also foresee changes in the target groups for their ULL activities. It is perhaps not surprising that more “surface-level” changes (especially relating to promotion and marketing) are viewed as more practicable than “deeper” changes (such as those relating to their institution’s organisation or structure, which are only envisioned by three universities).

3. PROVISION OF ULLL

A. Types and modes of delivery of ULLL offered

Regarding the types of ULLL programmes participating institutions offer, as the graph below illustrates, the survey found that requalification courses are the most commonly offered programme. Other credit-bearing courses are also relatively well-established, with courses offered at Bachelor’s or Master’s level, offered by several of the universities in a different format to accommodate learners. E-learning courses are offered by three universities.



Non-accredited courses and open lectures or seminars were selected less frequently by survey respondents, suggesting that the range of programmes available to learners who do not want to, or cannot commit to a more demanding accredited programme (which may include learners without formal qualifications or prior experience of higher education) is more limited. Compared to the situation prior to the COMPASS project, the survey found that the overall number of ULLL courses has increased at all universities, with several respondents highlighting a particular rise in online or blended courses.

Respondents were also asked to reflect on how, under normal (i.e. post-pandemic) circumstances, their institution would deliver programmes in order to support ULLL. All respondents indicated that all or most of their programmes would be delivered by professionals and academics, and all universities also envisioned offering most or all of their courses at times that were suitable for workers. All but one university stated that they would

deliver most or all of their programmes in accordance with individual or organizational needs, whilst delivering courses at different locations was a less popular option, with half of the universities saying that none of their courses would be delivered in this mode. This raises concerns about the availability of ULLL for learners in remote areas (especially disadvantaged learners who may not have access to online learning), and possibilities for expanding opportunities outside of Moldova's urban centres should be explored.

With regard to how the modes of delivery have changed since the beginning of the project, most (four out of six) universities indicated that they have begun offering remote learning, or have increased their offer in this area. This is unsurprising given that since the beginning of the project, the onset of the Covid-19 pandemic has prompted universities around the world to hugely upscale their online learning provision. However, taking into account that the project planned to furnish partners with equipment to deliver online teaching, it is very reassuring to know that the COMPASS contribution with this equipment is being used and is making an impact on their existing practices.

The survey also included questions about additional ULLL activities (besides teaching) that universities offer, and how they are delivered (i.e. through a separate LLL unit, academic faculty or a different unit within or outside of the university). Among the available options, "support courses for study skills" was the most common – offered by all but one university, and in each case through a separate LLL unit. It is promising that so many universities are making progress in this area, and that students are being equipped with the skills needed to engage in lifelong learning.

Academic advice or guidance, advice related to careers or professional development, mentoring or tutoring during a course, and e-learning services were offered by the majority of universities. However, the answers from the two members of staff from the same university disagree, and it is not possible to determine whether their institution offers them or not, or whether they are offered by a dedicated LLL unit or a faculty. Other services were less widely available, and not always administered through a separate LLL unit. For example, courses for special target groups were only offered by 3 institutions (in two cases by their academic faculties, rather than dedicated units), and services for the validation of prior learning (VPL) were even less common, offered (both as VPL for entry into a course and as part of a diploma) by two universities.

These replies seem to confirm the tendency identified above that universities' ULLL provision focuses on more on professional development than on engaging certain target groups that may be underrepresented at their universities. The relative lack of VPL services similarly suggests that, as noted above, universities are not yet doing enough (or are not yet prepared) to cater for learners without academic qualifications, or for adult learners with non-traditional backgrounds, despite this being one of the fundamental aims of ULLL. It is, however, worth noting that all respondents indicated that in the case that their institution did not offer the service, it would do so within the next two years.

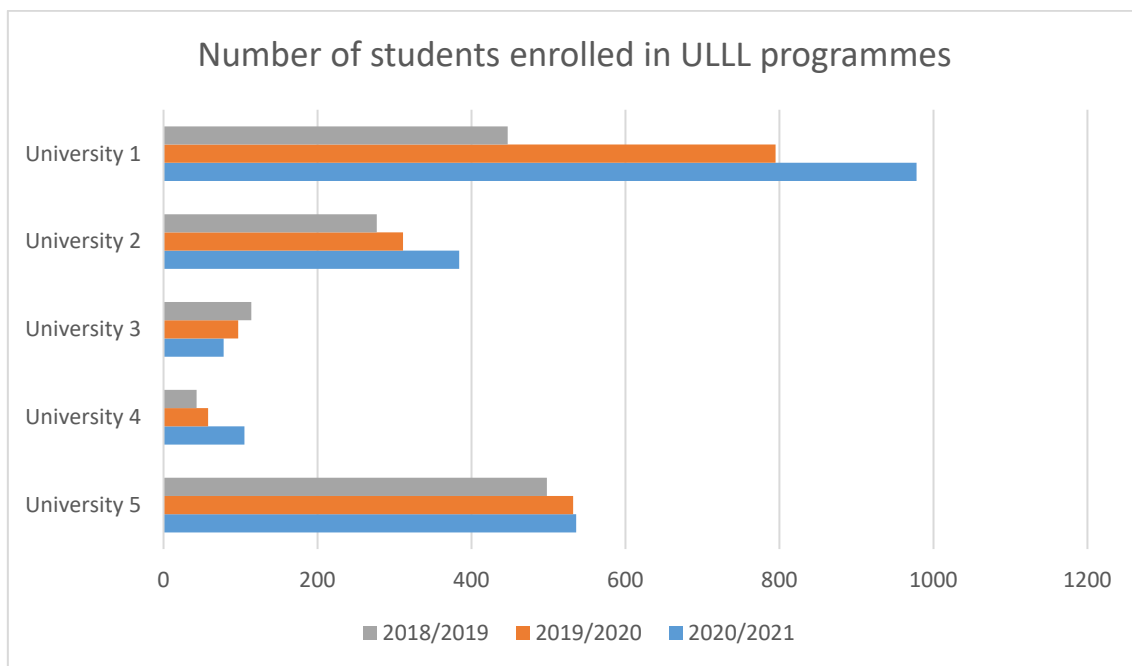
In addition to services for students, the questionnaire also asked for information regarding services for staff relating to universities' LLL activities. Promisingly, most participating institutions indicated that they offered such services, including administrative services for LLL (for the purposes of financial management, marketing, and the organisation of courses), and, importantly, staff development for academic staff across the university. However, given that the two responses submitted by the same university disagree on each of these points, it is questionable whether any conclusions can be drawn from this part of the survey.

Interestingly, there was also not much consistency among the different institutions in whether these services were delivered by a separate LLL unit, a different central unit, or by faculties, which may reflect how different universities have different institutional structures and procedures in place for delivering these services.

Regarding services or activities that are not targeted at students or staff, but at external stakeholders, the survey found that two of the participating universities are at the forefront of these services, cultivating both regional collaboration with employers and with public authorities, and engaging in technology transfer. However, they primarily do not do so through a LLL unit, but a central unit within the university. Most other institutions provided some, but not all, of these services.

B. Number of students engaged in ULLL activities

Concerning the number of students engaged in ULLL, a mixed picture emerged from the responses provided by the six participating universities (see figure below). Three universities indicated that engagement in their ULLL activities has increased, with one university registering a tripling in students (it should be noted that this was the institution that provided two responses, that here again, were not entirely coinciding).



However, two universities in fact registered a decline in student participants, with one university indicating that their number has more than halved, from 978 in 2018/2019 to 447 in 2020/2021. One respondent did not provide any information on this question. These disparate results, combined with the potential effects the Covid-19 pandemic might have had on students' participation, suggest that it may be too early to draw any conclusions on current trends in student participation in ULLL in Moldova, and on the impact the COMPASS project will have in this area. One university did not provide any information regarding the number of students enrolled in their ULLL programmes.

4. INSTITUTIONAL STRUCTURES AND ACTORS INVOLVED IN ULLL

A. Organisation, structure and leadership of ULLL

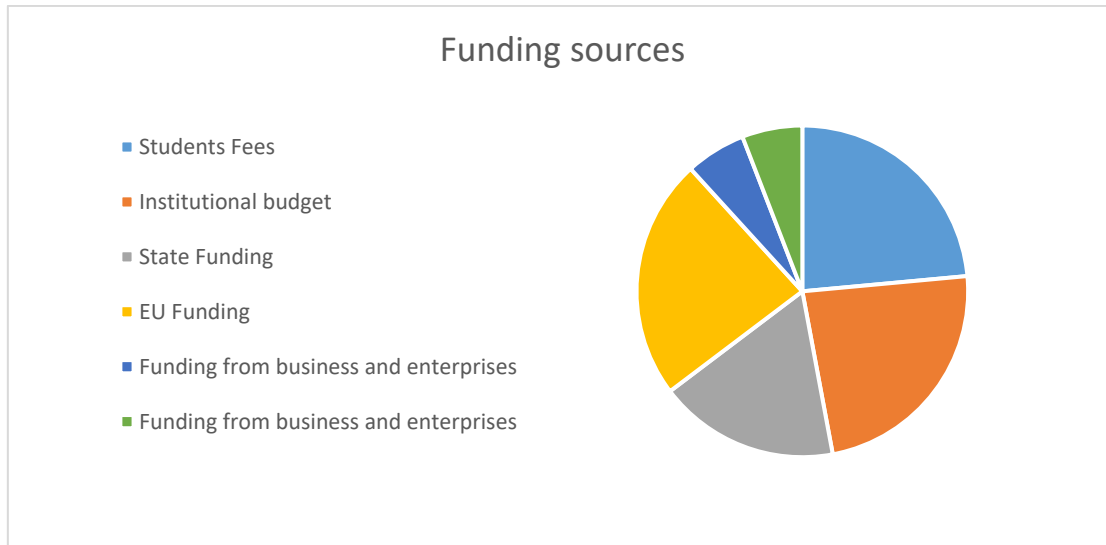
On the topic of ULLL leadership, all but one institution indicated that the Head of the LLL centre is one of the main, if not the sole, person responsible for ULLL. In some cases, the rector or vice-rector also has some responsibility for ULLL. None of the participating universities reported any significant changes in these hierarchies since the beginning of the project, although some noted that LLL strategies, regulations or infrastructure have improved.

Institutions were also asked to specify the individual or body responsible for a range of ULLL related tasks. While tasks such as the management of human resources and the registration of learners is predominantly managed by the institution's LLL unit, other less administrative tasks, such as the selection of courses and methodologies, and the evaluation of course quality, also involve the university's academic faculties or a central unit. This suggests that LLL units within most institutions are primarily responsible for the coordination and organization of ULLL, and that for more academic matters, other actors within the institution are mobilised.

According to survey responses, internal LLL units are also less likely to be involved in professional or career advice and guidance, academic advice and guidance, the marketing of ULLL, or VPL processes, with the majority of universities indicating that these were organised at faculty level or by a different internal unit. LLL units seem to be slightly more involved in delivering support courses to help students with difficulties, and in the financial management of ULLL. However, here too, other bodies from within the institutions are often involved.

B. Financing

As discussed in section 2, item E ("Limitations"), a lack of adequate funding is a challenge that has persisted for all the universities since the beginning of the COMPASS project. The survey set out to identify institutions' funding sources, and concluded that, as illustrated in the graph below, most participating universities draw their finances from a combination of different sources, including student fees, state funding, EU funding, institutional budgets, and in one case even funding from business or enterprise. While "student fees" was the most commonly selected answer, it is interesting to note that respondents from two universities did not choose it, suggesting that ULLL activities continue to be offered to students for free at certain universities.



Regarding whether and how funding has evolved since the beginning of the project, two universities indicated that funding has increased (according to one of them, due to the EU project), whereas three universities registered no change. Interestingly, the two responses submitted by the same institution contradicted each other on this topic again, with one suggesting that state funding has decreased in comparison to student fees, while the other indicated that there has been no change. Since neither of the respondents is a representative of that institution's lifelong learning or continuing education unit (one respondent is the rector of the university, and the other is the head of the European Integration and Academic Mobility department), it is difficult to determine which of the respondents has a more accurate and up-to-date understanding of the situation of ULLL at their institution. As stated earlier, the results should be treated with the appropriate degree of caution.

C. Teaching

The next set of questions centred around the teaching staff engaged in ULLL activities. Here, as with the number of students engaged in ULLL, there are no clear, trans-institutional trends that emerge from the survey results. While some universities registered a drop in teaching staff participating in ULLL since 2018, others indicate that this number has risen.

Although some correlation between a rise or fall in student numbers and in teaching staff can be observed, it is interesting to note that there is little consistency in this regard, and that institutions vary significantly in terms of the ratio of students to teaching staff engaged in ULLL activities. One institution registered 60 teaching staff members in 2021 for 536 students, while at another university, 14 teaching staff members were responsible for 78 students. Somewhat surprisingly, the institution that saw its number of students engaged in ULLL drop from 978 to 447 registered a slight increase in ULLL teaching staff, from seven in 2018 to nine in 2021.

What these figures do not shed any light on is whether the teaching staff considered for these questions are engaged full-time in ULLL activities, or whether (which is more likely), they also have other responsibilities within the institution, and if so, what percentage of their work is dedicated to ULLL. Measuring this is of course a difficult undertaking, which involves a much more fine-tuned analysis of teaching staff's tasks and responsibilities. This may also explain why yet another discrepancy can be observed in the two answers submitted by the same

institution, with one registering a significant increase (from 2.8% to 5%) in teaching staff engaged in ULLL, whilst the other indicates that the number of teaching staff has remained the same as in 2018.

When asked to select the mechanisms in place for motivating teaching staff to engage in ULLL activities, only two institutions selected financial incentives, whereas three institutions indicated that they offer institutional recognition, and one allows teachers to collect badges or credits which contribute to their career progression. According to the survey responses, little has changed in this regard since the beginning of the COMPASS project, although one university explained that the creation of new LLL courses has motivated teachers to become more involved.

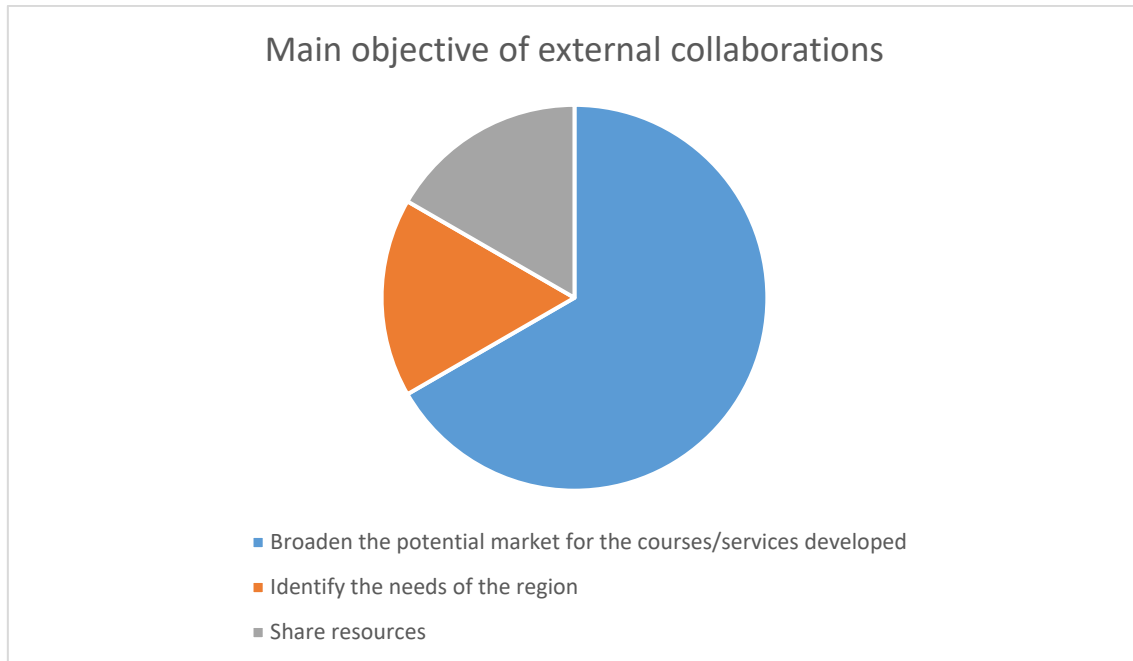
Furthermore, all institutions stated that they offer ULLL staff development programmes, either as part of their general professional development offer for teachers, or as dedicated ULLL-related training. Over the course of the COMPASS projects, some of the participating institutions have offered new training programmes for university staff, with one of them even indicating that they have been able to support participating teachers financially. It would thus appear that through these activities, the challenges relating to teachers' levels of motivation and expertise are beginning to be addressed, although it remains to be seen whether adequate funding will be secured in order for this work to continue.

5. EXTERNAL ENGAGEMENT AND OUTREACH

A. External partnerships and collaborations

Given the crucial role external stakeholders, including public authorities, employers and civil society play in ULLL, respondents were asked to identify their institutions' key external partners, and indicate whether or how they have changed since the beginning of the project. Representatives of two universities highlighted their new partnerships with public authorities at local and national level (including the Ministry of Education and Research).

By contrast, only one respondent mentioned representatives of business as an external stakeholder that their institution now collaborates with. Considering that, when asked to identify the main objective of their external collaborations (see figure below), four of the six participating institutions stated that these served to "broaden the potential market for their courses or services", it is even more striking that universities are not yet making more efforts to establish partnerships with industry and business. Only one university, for example, indicated that in the last two years, they have changed their objective to adjust more to the labour market needs. This suggests that there is significant potential for Moldovan universities to develop their network and activities involving business and industry, which would undoubtedly prove hugely beneficial to their ULLL students.



On a more promising note, according to the survey responses, half of the universities have increased their ties with external partners since the beginning of COMPASS. Among the participating institutions, there is significant variation in whether these collaborations are mostly at the local, regional or national level. Moreover, hardly any change was noted with regard to the level at which most universities establish collaborations and partnerships. This is evidently another area in which universities could expand and develop their partnerships, in order to ensure that they have ties with key stakeholders at all levels. It would be worth exploring how through stronger inter-university networks, such partnerships could be achieved.

When asked about external partners' involvement in course design, half of the universities indicated that partners are not consulted at all, one university stated that partners' needs are considered (in the context of wider labour market requirements), and one university involves partners in the course review. Only one indicated that they develop joint education programmes with partners. Here, it seems, there is not only a lot of potential for greater involvement of external partners in the development of ULLL programmes, but also for institutions to learn from each other through shared best practices.

An open-ended question, about the main success factors of external collaboration, generated a range of different answers from respondents. However, the most commonly cited factor (provided by three universities) was the added value external professionals bring to their ULLL activities, especially as teachers. It is promising to observe that such synergies between academia and industry are already being developed.

There was also little consensus on the main obstacles to successful external collaborations participating universities face. Financial limitations were cited by three respondents, and a lack of potential partners or experts to collaborate with by two, suggesting that insufficient resources (be they monetary or human) remain a significant challenge for universities in implementing ULLL. Two respondents also indicated that their universities struggled with bureaucracy and "inconsistencies and regulatory gaps", which implies that structural barriers are also holding such activities back, and may merit more work and attention.

Regarding the kind of collaboration universities would like to establish with external partners, the most commonly provided answer was to create joint programmes, including (proposed by one university) professional conversion programmes. Other types of activities, including organizing symposiums or other events, were also suggested.

H. Marketing and promoting ULLL

Half of the participating universities indicated that they do not have a marketing or promotion strategy in place for ULLL. Disagreement between the two responses submitted by the same university on this issue suggests that universities may have an informal strategy to promote ULLL, but that this is not well-established or fully developed or well communicated internally. Those universities who do have some strategy in place use a variety of marketing tools, including online and offline media, national and international events, and alumni networks. Regarding how their approaches have changed over the past two years, some universities indicated that they have used social media and other online tools (e.g. the university website) more.

6. LOOKING AHEAD

When asked to describe how the “ideal ULLL” in their institution could be achieved, most respondents suggested expanding and diversifying their programme offer. Two respondents highlighted in particular the objective of making programmes more learner-centred and tailored to the needs of target groups, while others emphasised the importance of involving more external stakeholders and increasing the number of teaching staff engaged in ULLL.

For two respondents, improving the overall situation of ULLL is also predicated on strengthening accreditation, authorization and certification processes, which they perceive as a significant barrier to the successful implementation of ULLL. Consolidating the LLL centre and granting it more financial autonomy were also highlighted by respondents as important steps towards achieving the “perfect” ULLL scenario.

In order to measure progress towards this ideal, participating universities were asked to propose indicators. The most common answer (given by all but one respondent) was to consider the number of programmes available and how many students they attracted. While such quantitative indicators, which measure the amount and scale of programmes, are important, focusing on them should not come at the cost of teaching quality, learner experience, and increased diversity and inclusion. It is therefore promising that two respondents (from the same university) also highlighted the importance of student satisfaction as a possible indicator, whilst one respondent proposed taking into account the target groups that are being addressed through ULLL activities.

As argued previously in this report, the different answers submitted here suggest that universities would probably have much to gain from exchanging ideas and approaches, and working towards improved ULLL together, rather than separately.

Overall, all respondents agreed that thanks to the COMPASS project, their institution was closer to achieving the project’s definition of ULLL:

ULLL is the provision by higher education institutions of learning opportunities, services and research for: the personal and professional development of a wide range of individuals - lifelong and lifewide; and the social, cultural and economic development of communities and the region. It is at university level and research-based; it focuses primarily on the needs of the learners; and it is often developed and/or provided in collaboration with stakeholders and external actors.

8. GENERAL CONCLUSIONS

Overall, the results of this 2nd survey suggest that the situation of ULLL in Moldova has improved and continued to develop since the beginning of the COMPASS project. Most of the participating universities indicated that a ULLL strategy or policy has either been newly implemented, or renewed or reviewed, that ULLL has become a higher priority for the university leadership, and that more students are enrolled in ULLL programmes. More importantly, it appears that universities are experiencing a change in institutional culture, whereby ULLL is being valued more by teaching staff and students alike.

Nonetheless, much work still needs to be done to further expand and promote ULLL across Moldovan universities. While the participating universities have benefited from increased financial support through COMPASS, adequate funding remains as much of a challenge to their implementation of ULLL as it was four years ago. Moreover, universities continue to struggle with a lack of motivation and expertise among teaching staff to deliver ULLL programmes and activities. While it is promising that universities are offering ULLL-related training to their teaching staff, there is evidently a need to engage them further in ULLL, for example by offering them financial and non-financial incentives.

There also appears to be a need for stronger, more systematic mechanisms for the quality assurance of ULLL activities, in which only few universities registered an improvement over the course of the COMPASS project. The de-centralized manner in which ULLL-related services and activities are delivered, which, besides the LLL centre, often also involves academic faculties and other units, may pose a challenge here. However, this could be addressed through stronger regulatory frameworks at the institutional, and ideally national level, which would furthermore serve to harmonize the currently very diverse and variable field of ULLL.

It is encouraging that several of the universities participating in the survey noted an increase in partnerships with various external stakeholders. However, much more could be done in this area, especially in engaging with industry partners and businesses, and increasing their involvement in the development of courses and other ULLL activities, which as of now remains marginal. Another area for improvement is universities' marketing and promotion of ULLL, with half of the institutions surveyed still lacking a marketing strategy. Promisingly, many respondents highlighted an increased use of social media to advertise ULLL activities.

Unfortunately, the observation made in the 2018 report, that "HEIs in Moldova do not perceive ULLL as a tool of integration for society" continues to hold true. This is reflected in the types of ULL courses offered by participating universities, which primarily consist of credit-bearing courses, many of which are part of degree programmes. By contrast, open, non-accredited programmes, which would be accessible to learners without prior qualifications or with limited experiences of formal education, are much less common. Moreover, although participating universities claim to have diversified their target groups

since the beginning of the COMPASS project, their primary target groups remain professionals, alumni, and public authorities and organisations. Minority groups, such as migrants, former prisoners, people living in remote areas, or learners that face otherwise disadvantaged are not among the groups ULLL activities are currently aimed at. While it is promising that most respondents claimed that their institution aims to make their ULLL provision more learner-centred and tailored to target groups, it is crucial that institutions look towards more non-traditional learners, and make just as much of an effort to include them.

While the limited number of survey responses means that this report can only be impressionistic, rather than offering a holistic picture of ULLL in Moldova, it nonetheless sheds light on some of the areas in which universities have improved, not least due to the contributions of the COMPASS project, as well as areas in which more work needs to be done. It remains to be seen whether the good work that COMPASS has put in motion will continue beyond the project lifetime.