

# Conceptual evolution and policy developments in lifelong learning

Edited by  
Jin Yang and Raúl Valdés-Cotera



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Published 2011 by  
UNESCO Institute for Lifelong Learning  
Feldbrunnenstraße 58  
20148 Hamburg  
Germany

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ISBN 978-92-820-1172-0

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Cover design by Satz · Zeichen · Buch, Hamburg

Designed and typeset by Boldface Typesetters, London

Printed in Germany by Druckerei in St. Pauli

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# Preface

We are now living in a fast-changing and complex social, economic and political world to which we need to adapt by increasingly rapidly acquiring new knowledge, skills and attitudes in a wide range of contexts. An individual will not be able to meet life challenges unless he or she becomes a lifelong learner, and a society will not be sustainable unless it becomes a learning society. Furthermore, equal access to learning opportunities is an indispensable condition to realise the right to education for all. In response to these needs, lifelong learning has become a guiding principle of education development and reform worldwide.

In recognition of the status of the World Expo 2010 in Shanghai as a platform for exchange of ideas and experience in lifelong learning, UNESCO, the Shanghai Municipal People's Government, the Chinese Society of Educational Development Strategy and the Chinese National Commission for UNESCO joined forces to co-organise the Shanghai International Forum on Lifelong Learning from 19-21 May 2010, during the World Expo. The aim of the Forum was twofold: to reinforce the momentum for lifelong learning engendered by the Sixth International Conference on Adult Education (CONFINTEA VI), held in Belém do Pará in Brazil in December 2009; and to share Member States' best practice in harnessing the lifelong learning discourse as a comprehensive course of action for establishing learning systems and societies.

The three-day Forum was successful in many respects. It brought together more than 200 dedicated participants from 35 countries and a truly remarkable group of experts from across the world, who contributed to developing learning concepts and practices within a lifelong learning perspective. The Forum offered a unique opportunity for practitioners, policy-makers, advocates and academics alike to share experience and achievements, and to debate the crucial issues facing education today in a series of plenary sessions, thematic debates and visits to World Expo and lifelong learning institutions in Shanghai. Its success can also be attributed to the genuine goodwill, dedication and strong commitment from all co-organisers, as well as staff and volunteers who helped in the organisation of the Forum.

Both the Government of China and UNESCO attached great importance to the organisation of the Forum. Ms Liu Yandong, the State Councillor of

China, sent a congratulatory message to the Forum. Ms Irina Bokova, Director-General of UNESCO, and Mr Yuan Guiren, Minister of Education of China were present at the Forum and addressed all participants. Ms Bokova stressed that UNESCO has from its creation always focused on education as a right and a means for upholding and fulfilling many other rights and for achieving an array of internationally-agreed development goals such as the Millennium Development Goals, Education for ALL (EFA) and the Decade of Education for Sustainable Development (DESD). She reaffirmed the role of lifelong learning in addressing development issues globally and encouraged all participants to work together with optimism, creativity and commitment to make lifelong learning a reality for people everywhere.

Mr Yuan Guiren emphasised the importance and urgency for China to build a lifelong education system and a learning society. He indicated that the Chinese government would promote lifelong learning by national legislation. It would, reform curricula and teaching methods, expand continuing education, construct 'overpasses' in the transition between different types and levels of education, and establish a financial support system to meet the needs of lifelong learning for all, so as to realise the goal of modernising education and building a learning society by 2020.

Participants discussed a range of conceptual issues in lifelong learning, shedding light on its evolution and stressing its key features. Lifelong learning is life itself. Lively moments were shared in country reviews, on policy formulation but also on emancipatory movements, leading to a desire to promote lifelong learning. The Chinese reform drive for building a learning society and a lifelong learning system created a peak of interest and generated sustained attention as it has provided true hope for a major and authentic breakthrough.

The 24 papers collected in this book document the rich debates and exciting discussions in the Forum. We wish to thank the speakers and all participants who contributed to the success of the Forum. It is our sincere hope that the Forum and this publication will be able to contribute to the endeavour of the international community in making lifelong learning a reality for all.

Adama Ouane  
*Director*  
*UNESCO Institute for*  
*Lifelong Learning*

Hao Keming  
*President*  
*Chinese Society of Educational*  
*Development Strategy*

# Acknowledgements

First of all, we would like to express our sincere thanks to all the speakers for their valuable contributions to the Shanghai International Forum on Lifelong Learning and to this publication.

We owe great debt to the Chinese hosts of the Forum, the Shanghai Municipal People's Government and Shanghai Education Commission, the Chinese Society of Educational Development Strategy (CSEDS) and the Chinese National Commission for UNESCO, as well as staff and volunteers, whose genuine goodwill, dedication and strong commitment made the Forum a resounding success.

Mr Cao Cheng, administrator of CSEDS, has facilitated the collection of papers from the Chinese contributors and arranged the initial translation of the text from Chinese to English.

We are deeply grateful to Mr Virman Man, Head of the Publications Unit of the UNESCO Institute for Lifelong Learning (UIL) for his editorial work on the full text.

We would also like to thank Ms Hannah Mowat, Editorial Assistant of the *International Review of Education* and Ms Rose Wiseman, UIL intern, for help in editing some of the papers.



# Introduction

Jin Yang<sup>1</sup> and Raúl Valdés-Cotera<sup>2</sup>

## Background

Since its formation UNESCO has focused on the right to education. It has always believed that education is a fundamental right and that in fact it is the means for upholding and fulfilling all other rights. From its inception, the Organization has recognised that education should be neither the privilege of an elite nor a matter for one age group only. Rather, it should be both universal and lifelong.

Furthermore, UNESCO has emphasised that recognising the right to education means little unless it is accompanied by measures creating the conditions needed to exercise this right. UNESCO's commitment at the World Education Forum at Dakar in 2000 to reach the six Education for All (EFA) goals by 2015 embodies a strategic approach in creating learning opportunities for all. The Dakar Framework for Action explicitly recognises that education – from the care and education of young children and continuing through lifelong learning – is central to individual empowerment, to eliminating poverty at household and community level, and to broader social and economic development. EFA indeed is an absolute minimum for any country, the foundation for building more inclusive, more just societies.

In the knowledge-based global economy of the 21st Century, future prosperity and security as well as peace, social harmony and nurturing the environment will depend on people's access and capacity to make choices, to adapt to rapid change and to find sustainable solutions to pressing challenges. Indeed, education and lifelong learning are key. UNESCO's *Medium-Term Strategy for 2008–2013* contends that development and economic prosperity depend on countries' ability to educate all their citizens. Quality education for all is thus an overarching UNESCO objective. Lifelong learning is the essential organising principle for reaching this goal and for contributing to the advancement of formal, non-formal and informal learning.

In recent years, some UNESCO Member States have made substantial progress towards establishing lifelong learning systems. However, the discourse of lifelong learning is only partially and inconsistently evident in policy and practice. Faced with 21st Century global challenges, it is more

imperative still for each and every country to make lifelong learning for all a reality. The need for sustainable socio-economic development in the context of the current global financial crisis and the threat of climate change has created a renewed urgency for quality learning opportunities for all, especially for marginalised groups who have least access.

Lifelong learning covers the full range of provision of learning opportunities, from early childhood through school to further and higher education. However, it extends beyond formal education to non-formal and informal learning for out-of-school youth and adults. The Sixth International Conference on Adult Education (CONFINTEA VI), which was held in Belém do Pará in Brazil in December 2009, reaffirmed the role of lifelong learning in addressing development issues globally. The Belém Framework for Action is critical in guiding UNESCO Member States to harness adult learning and education for a viable future for all.

The mandate of UNESCO's Institute for Lifelong Learning (UIL) is to support and link research, policy and practice. It facilitates advocacy, research and capacity-building and fosters partnership. With a wealth of expertise and a huge knowledge base, its extensive networks of policy-makers, researchers and civil society are active in lifelong learning. In the last 10 years, UIL, in collaboration with UNESCO Member States, has organised a series of policy dialogues on lifelong learning, including the International Conference on Lifelong Learning (Beijing, China, 2001), International and Regional Perspectives and Practices in Lifelong Learning (a series of regional conferences in Asia, Europe and Latin America, 2001–2002), and policy dialogues "Lifelong Learning" (Busan, Republic of Korea, 2006) and "Building Effective Partnerships for Lifelong Learning" (Changwon, Republic of Korea, 2007).

The World Expo 2010 centred on the theme "Better City, Better Life" and took place from 1 May to 31 October 2010 in Shanghai, China, a city that registered tremendous progress in promoting lifelong learning in recent years. As an important member of the United Nations family, UNESCO was present and active throughout the six-month period of the Expo. In particular, the week of 17–23 May 2010 was UNESCO Week at the United Nations Pavilion. The contribution of UNESCO Education Sector was organised around the theme of learning to live together sustainably in cities. Against this backdrop, the Shanghai International Forum on Lifelong Learning took place from 19 to 21 May during the World Expo.

As continuation of the policy dialogue for lifelong learning and capacity development in UNESCO Member States, the Forum focused on translating the discourse of lifelong learning into practical guidelines to build lifelong learning systems, including:

- reviewing progress and challenges in developing national strategies to promote lifelong learning;
- sharing experience and best practice in establishing lifelong learning

systems; and

- developing capacity for policy-making and research in lifelong learning in UNESCO Member States.

To attain these objectives, the Forum was organised into

- plenary sessions on the *evolution of and perspectives in lifelong learning; policy frameworks designed to build learning societies; transforming teaching and learning through lifelong learning; and major strategies for promoting lifelong learning*;
- thematic debates carried out by parallel groups, each focusing on one of the six sub-themes of the Forum, i.e. *the responsibilities and roles of governments, civil society and individual learners in building learning societies; reforming formal education in a lifelong learning system; promoting non-formal and informal learning for youth and adults; building a learning city (community); mechanisms for and innovations in financing lifelong learning; and creating a holistic lifelong learning system by fusing formal, non-formal and informal learning*; and
- visits to the UN pavilion and other exhibitions at the World Expo Park, as well as lifelong learning institutions in Shanghai.

The Forum was a unique opportunity for practitioners, policy-makers, advocates and academics alike to share experience and achievements, and to debate the crucial issues facing education today.

## Summary of contents

The 24 papers collected in this book document the rich debates and exciting discussions in the Forum. To help readers to navigate through the text, the papers are grouped into five thematic sections: (i) conceptual evolutions of lifelong learning; (ii) policy developments in promoting lifelong learning; (iii) distance education, new learning media and higher education in lifelong learning; (iv) Learning city and lifelong learning; (v) rural and industry development and lifelong learning. In the last section of the book, the Summary Report by Manzoor Ahmed, the General Rapporteur of the Forum, illustrates its rich discussions and major outcomes.

The first thematic section, ***Conceptual evolutions of lifelong learning***, includes four papers by distinguished scholars, which represent the state-of-the-art in the conceptualisation of lifelong learning.

In his paper *Discovering the treasure of learning*, Roberto Carneiro urges a revisiting of the main recommendations of the *Delors Report*, and of the four pillars of lifelong learning (learning to know, learning to do, learning to live together and learning to be) as key organising principles for the advance-

ment of formal, non-formal and informal learning. He offers empirical evidence derived from evaluative research on reinforcing adults' basic meta-skills. In addition, the paper argues for an exploration of the ways in which public policy can establish the foundations of a qualifications framework that provides for the full recognition, accreditation and transfer of experiential, informal/tacit and non-formal learning outcomes.

In *Evolution of and perspectives on lifelong learning*, Adama Ouane illustrates the holistic and humanistic nature of lifelong learning, as well as the crucial role it plays and the benefits it offers in inclusion and sustainable development. He extends the understanding of the concept of lifelong learning to mobilise political support for a new course of action embedded in the UNESCO Director-General's call for a "New Humanism". The paper argues for new curricula that encompass formal, non-formal and informal learning. It also makes the case for in-built mechanisms of recognition, validation and accreditation of all kinds of learning and education.

In the paper *Lifelong learning: moving beyond Education for All*, Rosa María Torres reviews critically the six "basic education" goals of EFA that are organised by age and according to the formal/non-formal dichotomy, with no mention at all of "learning". She argues that effectively adopting lifelong learning as the new paradigm implies a major shift for the EFA platform, and for education and learning in general, both in policy and in practice. The paper points out that the real challenge is building a Learning Society – communities that learn – a goal far more complex, democratic and egalitarian than building an Information Society.

In her paper *Revisiting the classics: the necessary return to research on the teaching/learning relationship in modern China*, Ye Lan argues that studies of lifelong learning and lifelong education must incorporate an exploration of different theories of learning and education and their practical implications. Most importantly, the paper re-visits Confucius' thoughts on teaching, learning and their inter-relationship. The author discusses how we should understand lifelong learning in a more comprehensive way. The paper concludes that re-visiting Confucius' thoughts may present a good prescription for the ailments of contemporary teaching and learning.

The Section on ***Policy developments in promoting lifelong learning*** contains 11 papers by policy-makers or policy-oriented researchers, reflecting policy developments and practice in both developed countries (regions) including the Canada, United States of America and the European Union and developing countries including Benin, China, Mexico, South Africa, Tanzania, Thailand and the Philippines. They take into consideration geographic representation and the heterogeneity of experience.

Hao Keming offers a comprehensive overview of recent lifelong learning development in *The development of an institutional framework of lifelong learning in China*. In particular, she looks at the major advances made with regard to school education, the development of continuing education as an

important component of China's education system. The paper analyses the institutional structures for lifelong learning. It explores theory, school reforms, pinpoints measures to promote continuing education, information technologies, and efforts to establish linkages between various types and modes of education and learning. Hao argues for increased financial investment in education and learning and calls for a financial support mechanism for learners.

In the paper *The development of lifelong learning policy in the United States of America*, Brenda Dann-Messier describes how lifelong learning policy in the United States of America is developed by reviewing the authorisation and implementation of the Workforce Investment Act 1988. The paper highlights six priorities in the re-authorisation of the law: the creation of an Incentive Fund; professionalisation of the field of adult education; career pathways; strengthening state and local accountability in provision; preparations for citizenship; and continued commitment to correctional education.

Roger Boshier points out, in *Better city, better life! Lifelong learning with Canadian characteristics*, that the most effective citizens are those who can comfortably work across cultures and appreciate (even celebrate) world views other than their own. Canadians have made important contributions to early formulations concerning lifelong education and are today committed to fostering democratic forms of learning in a broad array of informal, non-formal and formal settings. The paper analyses innovative developments and unresolved issues pertaining to lifelong learning in Canada.

Heribert Hinzen notes, in *Policy developments towards lifelong learning in the European Union*, that although achievements in policy have been remarkable, there are huge variations between EU member countries. Demographic change and growing migration are two major challenges hampering increased and improved learning opportunities. While the trend is towards increased participation, more needs to be done to improve employment-oriented vocational training and re-training in light of the current financial crisis. Over the coming decade, it will be interesting to study how countries cope with growing challenges, and how the right to education is asserted for individuals of various ages and from different social backgrounds.

In her paper, *Policy framework designed to build a learning society in Thailand*, Kasama Varavarn argues for policy that enhances synergies between formal, non-formal and informal. Moreover, the development of a learning society should be seen not merely as an educational goal but also as a development goal. Government must therefore recognise its vital role. In particular, it must strive to incorporate this vision into its overall policy framework; assess the ongoing situation on a regular basis; invest in services; serve the needs of marginalised groups; and provide technical support and incentives to mobilise greater and broader participation by society as a whole.

In *Lifelong learning and connected-up development: Insights from South Africa*, Shirley Walters illustrates that in the 15 years since South Africa moved from

being an authoritarian, racist state to one which pursues “democratic, non-racist and non-sexist” values, the country has aspired to embed lifelong learning into its education system. It has done so by establishing a National Qualifications Framework (NQF), working to develop a learning region, and by supporting a number of institutions striving to implement lifelong learning as a philosophy and an approach. The paper reflects critically on these initiatives from a personal perspective.

In the paper *From the “education system” to the “context of educational action”*: Reflection with a view to improved coordination between formal education and non-formal education in the domain of lifelong learning in Benin, Abdel Rahamane Baba-Moussa argues that the four pillars of lifelong learning laid down by the Delors’ report can only be put into practice if synergies are sought between non-formal education mechanisms (such as literacy centres, learning workshops and farming cooperatives) and formal education mechanisms at the heart of the school system. The paper proposes a model of educational provision that would enable African countries to respond effectively to the educational needs encountered in their specific contexts.

Salum R. Mnjagila’s paper *Promoting the quality of adult, non-formal, education and lifelong learning in Tanzania: policy, practice, challenges and prospects* reflects on conceptual understandings of the terms adult education, non-formal education, literacy and lifelong learning. It outlines achievements and challenges in access and equity, capacity-building, quality improvement and institutional arrangements. Recommendations are made on adult education and lifelong learning policy, governance and action plans. There is also concern to strengthen political will and public commitment to financing and advocating for adult education and lifelong learning for equitable development and genuine freedom.

Juan de Dios Castro’s *A review of Mexico’s lifelong learning model*, examines the offer of basic education for youths and adults, based on the interests and needs of communities. The paper highlights the salient features of the Model and describes the types of modules, didactic methodologies and linguistic strategies. The review also covers operational conditions and evaluation mechanisms.

In *Sharing innovative practices in financing lifelong learning in the Philippines*, Ma. Eloisa M. Ramirez argues that almost all agencies, organisations and institutions have a common difficulty in financing lifelong learning for sustainable development (LLSD) programmes. Innovative financing strategies are needed. The paper describes the context of education and lifelong learning in the Philippines, and some good practice in financing LLSD in the country. Ramirez goes on to review the implications and recommendations of a research project on financing of lifelong learning programmes for sustainable development in 11 Southeast Asian countries.

In *Using research to guide policy frameworks for building a learning society in the United States of America*, Judith Alamprese argues that federal and state

agencies are increasingly turning to research to gain insights into how adult education service delivery that can be improved through policy and technical assistance. In particular, she highlights three areas of emerging research that have implications for the development of effective adult education services and for informing policies and guidance: teacher quality and effectiveness; systems alignment; and career pathways as an instructional focus.

The Section entitled *Distance education, new learning media and higher education in lifelong learning* contains three papers. The first two cover the development of distance education and opening learning in the era of the knowledge society while the third covers reforms in higher education within a lifelong learning perspective.

Sir John Daniel's paper, *Distance education: Ends, means, opportunities and threats*, reflects that though it was once thought of as a second-rate form of instruction, distance learning now holds the key to an educational revolution that will see expanded access, enhanced quality and reduced costs. The paper explores the opportunities presented by the new media but warns of attendant threats to cost-effectiveness. Each generation of technology improves the basic cost structures in distance education and the trend towards open educational resources creates massive learning opportunities.

Kang Ning's paper *New paradigm of lifelong learning and the construction of a new learning media market – Informal and non-standard learning platform for all* contends that the new media technology has given birth to a new paradigm of lifelong learning, of learning which occurs everywhere. The paper describes the media learning supermarket as a new education media service platform and lifelong learning system with various networks, terminals and transmission paths. Kang points to some new education theories, a network system to support universal lifelong learning and a comprehensive new media learning system.

Han Yanming's *Reflections on the value of higher education in lifelong learning* contends that lifelong learning requires social organisation to establish fine-grained systems and mechanisms which can meet individual needs in learning content, learning means, learning style and learning method. In the era of the learning-oriented society, Han proposes that the fundamental roles of higher education should be to enhance social character, develop learning interest, improve creativity and promote all-round student development. Han suggests that the current higher education management system cannot meet the requirements of lifelong learning and some systematic reforms should be carried out.

The section on *Learning cities and lifelong learning* also contains three papers. One provides an introduction to the role of a city in a lifelong learning system and shares the Republic of Korea's experience in this regard. The other two are by policy-makers in the two cities of China showing policies and strategies adopted at the local level to building a learning city.

In *Introduction to building a learning city*, Han SoongHee surveys the

evolution of educating cities, learning regions and learning cities, and provides some theoretical considerations on the learning society. The paper describes the experience of developing learning cities in the Republic of Korea in the last ten years. It reflects on the changes that the learning city programme has brought to the cities, including the shift of focus from building physical infrastructure to building mental software conditions for human well-being. Citizens have begun to realise that education is not just about providing educational programmes, but about nurturing the whole city environment.

Li Junxiu's analysis in *Constructing a learning society for "better city, better life": Shanghai's experience* takes in economic and demographic factors, as well as residents' need for lifelong learning. It reviews governmental and social efforts to build a learning city and the major achievements to date, such as the provision of four types of lifelong learning opportunities, the creation of a rich learning culture, the promotion of inclusive lifelong learning for all and the establishment of digital lifelong education networks. In addition, the paper outlines some distinctive policy options for the future.

In her paper *Development of lifelong learning and promotion of the construction of a learning city in Changzhou*, Ju Liqin argues that a learning city is a city committed to the ideology of lifelong learning: learning becomes part of its citizens' lives. The approaches taken by Changzhou include strengthening the government's role in promoting lifelong learning, enhancing the quality of community learning to satisfy residents' ever-increasing learning needs, reforming school education to enable students to become lifelong learners, and creating learning activities to help residents to develop a lasting enthusiasm for learning.

The Section on ***Rural and industrial development and lifelong learning*** contains one paper by a senior policy-maker who worked in China's Ministry of Agriculture and another by a senior coordinator of education in Chinese industry. In view of the sweeping changes and rapid developments in China, the issue of continuing education of labourers (employees) both in the rural areas and in industry is becoming increasingly demanding and complex.

In *Lifelong education of farmers in the context of coordinated urban-rural development in China*, Hong Fuzeng suggests that raising farmers' scientific and cultural skills and awareness is essential to efforts to rejuvenate China's countryside, improve overall agricultural productivity and increase farmers' incomes. It is contended that establishing a lifelong education system for farmers is an essential means of coordinating urban and rural development. Recommendations and strategies include appropriate laws and regulations; a guarantee mechanism to reform the employment permit system for farmers, raise funds and set up educational opportunities for farmers; and the promotion of distance education.

In *Lifelong learning and industrial development – Practice of machinery industry in China*, Tu Zhonghua writes that continuing education for employees has



become an indispensable part in developing and revitalising the machinery industry. With an acute shortage of senior management personnel, senior professional technical personnel and senior skilled personnel in the machinery industry, government can take an active role in promoting, planning and coordination continuing education. Improvements must be made in job specifications and vocational qualifications; industrial associations should have an enhanced role in continuing education, for which there is a need for increasing investment.

## Concluding reflections

We are fully aware that lifelong learning for all is a very complicated issue. Policy and practice in promoting lifelong learning are rich and diverse. It is beyond the capacity of a single international meeting and a single publication to give a comprehensive and exhaustive coverage of all issues in lifelong learning. Nevertheless, we believe that the Forum and the publication have made modest contributions to an ongoing process in the international community to promote lifelong learning, in particular, by deepening the understanding of the conception of lifelong learning and inspiring policy formation.

The Forum and the papers collected in this publication seem to regard lifelong learning as a concept resting upon the integration of learning and living – both horizontally in life-wide contexts across family, cultural and community settings, study, work and leisure, and vertically over an individual's whole life from birth to old age. The accent is on learning rather than on teaching, a shift which requires less emphasis on knowledge-conveying instruction and more on learning for personal development; less on the acquisition of special skills and more on a broader discovering, unearthing and enriching of people's creative potential. In the words of Robert Carneiro, the new educational landscape as one that moves from mostly taught learning to a combination of taught learning, a lot of self-learning, strong community learning, and increased assisted and networked learning – coupled with an unbundling of education services that allows for much-enhanced opportunities in relevant learning with far greater flexibility of time and place.

There are daunting tasks in front of us to translate the aforementioned very comprehensive concept of lifelong learning into policy frameworks. To make lifelong learning a reality for all implies not only a holistic and sector-wide educational reform. All sub-sectors and elements of the education system should be designed to cater to lifelong and life-wide learning, but also to the creation of learning opportunities in all settings or modalities (formal, non-formal and informal) for people of all ages (infants, children, youths and adults).

In promoting lifelong learning, the following considerations have policy implications:

- Governments are expected to strive to incorporate a vision of lifelong learning into their overall national policy frameworks and to embed lifelong learning into their national education systems.
- Lifelong learning policies need to be supported by broad social consensus, legislative instruments and coordination mechanisms to facilitate collaboration between various stakeholders.
- Making lifelong learning a reality for all calls for increased financial investment in education and learning. Given the principle that learning should continue throughout individuals' lives, it is essential to establish a financial incentive mechanism to mobilise greater and broader participation. Innovative financing strategies have to be tried out.
- The need for learning pervades every political, social, environmental, cultural and economic issue. Diverse formal, non-formal and informal learning opportunities must be developed and made equally accessible to all, with an emphasis on serving the needs of marginalised groups.
- Formal learning opportunities provided by primary, secondary and higher education form the 'basic education' of modern society. It is imperative to reform the curricula of schools and higher education institutions to reflect today's vision of lifelong learning, and to build new teaching/learning relations, to enable students to become lifelong learners.
- Facilitating synergy between diversified various learning systems calls for a learning outcomes-based qualifications framework or system and a coordinated approach to recognition, validation and accreditation as well as the transfer of learning outcomes from non-formal and informal settings.
- The development of information and communication technologies (ICTs) has made available a pool of e-learning resources, alternative delivery mechanisms and massive open learning opportunities. Further efforts need to be made in the effective use of ICT and open learning approaches so that quality learning opportunity is accessible to all at reasonable cost.
- A learning society is a society of learners and a learning city is where a new learning system emerges, revolves and grows to lead economic, social, and political development as a whole. Evidence from some countries shows that building a learning city (region, community) can be an effective approach to embodying the philosophy of lifelong learning and making learning part of citizens' everyday lives.
- Effective policies for lifelong learning need to be informed and inspired by evidence generated by research. Monitoring and evaluation, appropriate indicators and benchmarks on the effectiveness of policies, and accountability of programmes are essential for evidence-based policy-making for promoting lifelong learning.

To conclude, we would like to make reference to a remark of Ms Irina Bokova, the Director-General of UNESCO, in her address to the Forum: "As an ancient Chinese proverb says, if you are planning for a year, sow rice; if

you are planning for a decade, plant trees; and if you are planning for a generation, educate people. Let us work together with optimism, creativity and commitment to make lifelong learning a reality for people everywhere.”

### *References*

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## Part I

### Conceptual evolutions of lifelong learning

# 1 Discovering the treasure of learning

Roberto Carneiro<sup>1</sup>

*These are, to name a few: memory, reasoning power, imagination, physical ability, aesthetic sense, the aptitude to communicate with others and the natural charisma of the group leader, which again goes to prove the need for greater self-knowledge.*

*Learning: The Treasure Within<sup>2</sup>*

## Education: bridging the old and the new

Education is the ultimate realm of *Homo sapiens sapiens*. Nonetheless, it is fraught with oracles preaching novelty, and one cannot help eliciting innovation and enterprise as growing concerns in learning; but also, by mission – even design – education is a place of preservation and transmission.

This dual role of education, both to conserve and to liberate, with its potential for contradiction, conflict and even immobilisation, is more present today than ever before.<sup>3</sup>

One might even say that this pervasive duality in education is compounded by a rapidly-changing society. It is as if the “old order” of thinking is being replaced by new paradigms of understanding reality and of foreseeing our common predicament.

The increasing speed of change makes it difficult for us to stop and reflect. The future proves less and less to be the simple projection of the past. This is the “age of discontinuity”, to quote a remarkable contemporary analyst.<sup>4</sup>

Education – the supreme social function – is “caught” in the transition of millennia between “two fires”, two kinds of society. Ever more placed on the thin borderline between stability and change, between preservation and innovation, education undergoes unprecedented tensions. Indeed, education is a mirror of all contradictions that strike our modern societies.

In our *old* society – stable, simple and repetitive – memory controlled project, principles were immutably passed on, and exemplary patterns could be preserved as archetypes. It was the primacy of structure over genesis.

In our *new* society – unstable, inventive and innovative – project overcomes memory, future controls the past, patterns are constantly being put to question. It is the primacy of genesis over structure.

Society – old or new – is the natural habitat for humans. Human beings

cannot survive out of society. Education, in its radical sociality, is forged by cultural experience and social learning.

Knowledge and learning constitute the two faces of the same coin: they represent the process of societal ascent from the “primitive” forms of industry and information –predominantly economically-driven – to the more “advanced” forms of community and freedom – determined by cultural predicament.

Bridging the gulf between knowledge and learning steers the way to overcome a tragic flaw of our modern age. The more knowledge seems to be generalised – insofar as information appears to become accessible to all at the reach of our bare fingertips – the wider becomes the gulf every day, separating a developed world and an under-developed sub-world when measured by effective learning opportunities.

Major knowledge gaps and learning inequalities are fundamental breaches in the social brokerage systems of information.

Lessons delivered by our recent past show that welfare gaps stand a strong chance of widening in the new economy. We need to move beyond the technological fallacy of a connected world. The real challenge is to realise a bonded world. Connectivity – or the death of distance – ought to translate into greater proximity: the realisation of a global world where the affluent minorities are unequivocally committed to the fate of their fellow citizens in deprived areas, those who are the bearers of inter-generational poverty and inherited exclusion.

In a context of growing complexity, linear cause-and-effect relationships seem to lose their explanatory power. The cognitive frameworks left by the Age of Enlightenment – the objective truth and the power of reason – seem to us insufficient to attain the supreme knowledge that we all seek and do not find.

Ways of understanding our world, strictly based on a subject-object separation, on the human capacity to dominate and control the “exterior” reality, and on the supremacy of technological reason and its pragmatic imperatives, have ceased to make sense. On the contrary, the superiority of the subject-subject relationship, tropism towards non-fragmentary algorithms to deepen knowledge, and the emergence of holistic and integral ways of examining complexity are new paradigms that bear the promise of speaking to our inner core of meaning-making processes in a way that the mere exterior and material reality of things is unable to.

So the challenge is to ask, how do we re-think and re-enact the world in our lives, in such a way that instead of thinking of the world as a collection of objects, we think of it as a *communion of subjects*?

The subject-object split is the hallmark of the Enlightenment, the separation of the self from the world. Science is founded on the certainty that in order to know the world we must remain removed from our subjective human experience and rely instead on objective, reproducible,

impersonal data. This is a model of mastery and expertise: the expert as subject, the world as object. This attitude postulates a knowledge-rich education, one that could often end-up in a meaning-free learning.

This dichotomous way of understanding the challenges of our complex modernity has profound implications on the means chosen to better know the world.<sup>5</sup>

The codified and authoritarian way of scrutiny seeks the incessant progress of knowledge by means of control of the exterior reality. That which is not under the control of the scientist cannot, by definition, be known and dissected. This is the presumption in the rational school of today.

Alternatively, the tacit and inter-subjective way of knowing elicits participation as a superior value. Likewise, complexity is not compatible with simplistic algorithms of knowing – and of communication – based on an atomisation of knowledge. Our attention is progressively led to a better knowledge of the whole as opposed to a greater knowledge of the parts. These are founding directions for the school of tomorrow.<sup>6</sup>

## Learning throughout life and the four pillars

Learning throughout life is a strategic proposition destined to combine tradition and modernity. How, then, would learning throughout life be different from decades of adult education policies, endless discussions focused on recurrent education, or the recent surge of interest around lifelong learning? Is this merely a rhetorical face-lifting of old theories or does it truly encompass elements of novelty?

The stages and bridges of education are increasingly recognised as crucial. How the system conceives of the passage from one stage to another, the links from one stream to the following, tells us a great deal about the philosophy of the system. Are the stages conceived as smooth transitions, to facilitate mobility? Are the bridges wide, many and inviting? They should be, because the purpose of education needs to be both excellence and inclusiveness.

Learning throughout life, then, is both a way of organising education and a philosophy of education; not a preparation for life but life itself, to follow the overarching concept of Dewey. Learning throughout life must then be conceived as offering:

- diversity of itineraries in time, in content and in learning styles;
- continuing learning opportunities;
- community participation, decentralisation, diversification of finance and delivery, democratic consultations about the aims and practices of education;
- antidotes to un-learning and to de-skilling trends in vast segments of our societies;

- new social dimensions to knowledge production and competence acquisition; and
- action and remedies designed both to prevent and to minimise the inequitable distribution of knowledge.

It directly follows that *learning throughout life* – a proposition widely endorsed by all Commissioners of the Delors Group – is highly contingent on the formation of vibrant cultures of learning, at individual, communal and societal levels.

Continuous learning poses a formidable challenge to mainstream knowledge-driven societies. Seldom are individuals equipped with the skills necessary to self-organise and self-manage long-term knowledge paths. Therefore, underpinning metacognitive competencies and skills from the very early stages of formal education is becoming all the more important.

Learning to organise multiple sources of information, learning to learn from experience (experiential knowledge), dealing with the social dimensions of knowledge formation, learning to self-regulate the effort to learn, learning to forget and to un-learn whenever necessary and making room for new knowledge, combining – in adequate dosage – codified and tacit knowledge, permanently converting inert into active knowledge – these are but a few of the pressing challenges that form part of a learning culture.

Thus, the emergence of a new breed of competent and self-regulated learners is absolutely instrumental to the formation of learning cultures addressing each and all five dimensions of the lifelong learning conundrum: motivation (to undertake and to overcome barriers to learning), innovation (in content, methods, and delivery), sustainability (over time and space), efficiency (broader reach with fewer resources) and dissemination (showcasing best practices and benchmarks).

Self-regulated learners ‘seek challenges and overcome obstacles sometimes with persistence and sometimes with inventive problem-solving. They set realistic goals and use a battery of resources. They approach academic tasks with confidence and purpose. The combination of positive expectations, motivation, and diverse strategies for problem-solving are the virtues of self-regulated learners’.<sup>7</sup>

Most likely, lifelong learning will in the future occur in non-academic learning environments in a larger proportion than in the past. Non-academic learning environments are likely to be less instructor- or teacher-oriented and more learner-oriented which means they will require self-regulatory skills to a greater extent.<sup>8</sup>

Hence, a high-intensity lifelong and lifewide learning system addressing all walks of life would encompass a diversified range of incentives:

- to foster competency acquisition in de-institutionalised settings;
- to recognise, measure and accredit tacit knowledge and learning by doing (or doing by learning);



- to enhance the accumulation processes of human, social and cultural capital;
- to harness the dynamism and creativity unleashed by greater social diversity;
- to change the role of the State, moving away from the public provision of monolithic services and turning to regulatory roles in a context of multiple providers; and
- to learning without constraints and without frontiers.

The International Commission on Education for the 21st Century proposed four pillars of learning: Learning to Be, Learning to Know, Learning to Do, Learning to Live Together.<sup>9</sup>

Learning to Be takes on the nature of a timeless priority, already recognised in the Faure Report in 1971, that takes on the inner journey of each and every one as a process of spiritual and existential broadening that bestows a final meaning on life and on the pursuit of happiness.

Learning to Know is a form of learning that lies within the scope of scientific and technological progress. This pillar appeals to the urgent need of reacting to the multiplicity of sources of information, to the diversity of rich multimedia content, to new ways of knowing in a society that is closely inter-connected.

Learning to Do aspires to connect knowledge and skills, learning and competence, inert and active learning, codified and tacit knowledge, creative and adaptive learning. Learning by doing and doing by learning<sup>10</sup> equip us to face an uncertain world and also the changing nature of work.

Learning to Live Together encompasses the extraordinary challenge to rediscover a meaningful relationship, to raise the thresholds of social cohesion, to make viable the sustainable foundations for community development. It contains the core values of civic life and identity-building within a context of multiple belongings.

The four pillars of learning set out the lasting foundations for lifelong and lifewide learning in a scenario of a learning society.

Likewise, a comprehensive vision of learning throughout life as vitally important to all stages of one's life span will address three different development goals:

1. Personal and cultural development – related to sense, meaning-making and spiritual wealth.
2. Social and community development – related to citizenship, participation and sociality.
3. Professional development and sustainable employability – related to production, job satisfaction, material welfare and economic pursuit.

Learning in the new millennium is expected to make a major contribution to the realisation of the third aim – *grosso modo*, the traditional goal set by

the economics of growth and development. The evolution of our world towards complexity and inter-dependency, however, brings out the necessity to provide a broader frame to lifelong learning: putting upfront personal and cultural advancement, as well as citizenship development – two further human development needs that are far from being concealed within a narrow economic approach.

### Scenarios of a learning society<sup>11</sup>

Departing from education and flowing through the knowledge-driven age, we arrive at scenarios of a learning society designed to overcome the shortcomings both of a bureaucratic vision and of the economic domination over the education sphere.

A fully comprehensive model will consider the intersections of three key variables: paradigm shifts; delivery modes; driving forces.

In turn, each of these key variables is allowed to declinate longitudinally throughout time. Thus, they are permitted to unfold into three dimensions: past; present; future.

A summation of the 3 by 3 resulting combinations could be briefly described in the following matrix.

- a) Paradigm shifts: from industry (past), to globalisation (present thrust), and moving toward a New Renaissance period (utopian vision of values).
- b) Delivery modes: from uniform, rote systems (past), to segmented distribution (present market-driven trend) and gradually accommodating increasing levels of personalisation/customisation (utopian vision of distribution).
- c) Driving forces: from bureaucracy-led (past preference for national or State-controlled systems), to market-led arrangements (present move) which, in turn, should give way to empowered communities (utopian vision of radical devolution).

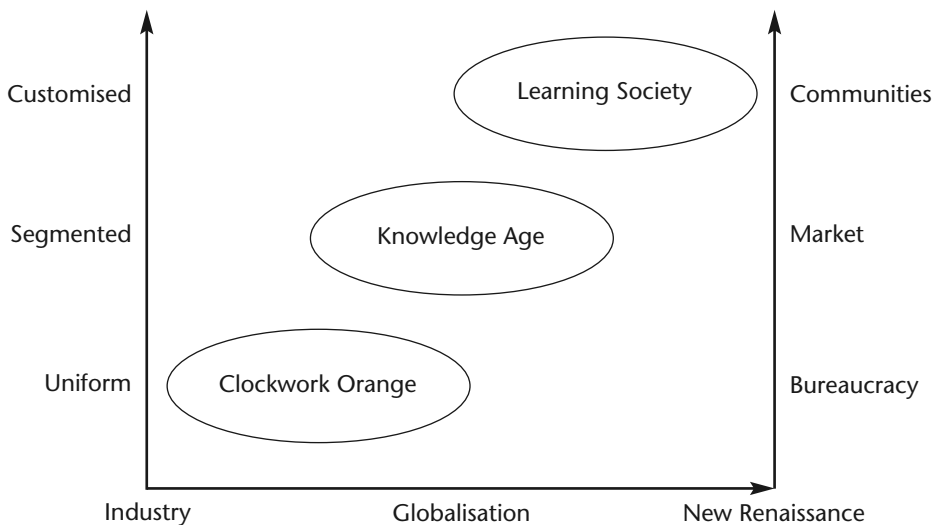
My submission is that we are swiftly moving from a Clockwork Orange education to a Knowledge Age, championed by a combination of a global order with market segmentation in distribution channels. The latter doctrine stems from the belief in a promethean knowledge. A knowledge generation capable of releasing humankind from bondage and of realising a supreme order of wealth.

The Big Picture that we favour does not end here. Economic theory, on its own, is grossly unsatisfactory to address a grounded humanistic and societal dream. The end of history would be too clumsy without a further horizon to aspire to.

Hence our concept of a learning society that realises the unity of learning. It is a vision made up of robust learning communities fully empowered to

conduct the business of education and training in accordance with their communal identities.<sup>12</sup> A civil society of this calibre exercises its prerogatives to the farthest limits of subsidiarity. That is to say, any State intervention is contained within the primordial rights of self-aware and self-determining communities.

Both education and learning would spring from a vision constructed around a three-nested system: *the learning classroom*, encompassing teachers and students; *the learning school*, bringing together superintendents, principals, school leaders, administrators, parents, school board members and trustees; and *the learning community*, extending reach and scope into community members, lifelong learners, the media, business communities, social and cultural institutions.



**Figure 1**

Addressing *educare* – in the purest Greek understanding – is a central tenet to this dream. The proposition of a learning society remains a *mysterium tremendum*. It is a powerful appeal to the realm of human will and consciousness to reach beyond simple knowledge as a panacea and a new consumption commodity to be managed in our daily portfolio of conveniences.

While the old industrial model seeks growth based on the expansion of inputs (low returns to scale condemned to diminishing returns), new learning inaugurates a new age of productivity growth and efficiency gains (growth in output per unit of input). This is achieved by “openness” – an attribute that allows proper knowledge diffusion and healthy competition.

The changing canon of learning produces a fundamental change in

education as it moves gradually *from industry to service*.

Taken from this angle, new learning would rebalance the strengths between supply and demand, would encourage the shift from a monopolistic and uniform provision to manifold providers focused on stakeholders, would transform teaching institutions into learning networks, and would also foster the move from objective knowledge transmission to personal and social learning.

In this changing landscape education institutions would undergo major pressures to replace the traditional emphasis on all-taught learning by a blend of flexible learning: some taught learning, a great deal of self-learning, as well as increased assisted and group learning. Learning interacts with the world through active knowledge (as opposed to inert knowledge), that is, the wholesale knowledge which adds value to problem-solving and interpretative abilities.

Un-bundling education services would also allow for enhanced opportunities in a new learning world that is able to bridge ancient mismatches between demand and supply of learning. Six major thrusts in the changing patterns of education and learning can be envisaged:

- learner-centred learning rather than teacher-centred learning;
- encouraging variety, not homogeneity: embracing multiple intelligences and diverse learning styles;
- understanding a world of inter-dependency and change, rather than memorising facts and striving for right answers;
- constantly exploring the theories-in-use of all involved in the education processes;
- reintegrating education within webs of social relationships that link peers, friends, families, organisations, and communities;
- overcoming the knowledge fragmentation that is typical of a first enlightenment mode of understanding in favour of more holistic and integral ways of knowing; and
- favouring an increasing role to non-formal and informal learning.

Can learning processes truly come alive?

How can informal, flexible and network, everytime and everyplace, learning emerge as a paradigm shift in a reinvigorated story of education?

## The challenge of informal learning

Learning is a pervasive human activity.

We are learning beings by design. Thus learning takes place in all circumstances of our modern lives, that is, at school, home, work or even on-the-move.

These different learning loci tend to overlap and blend into a continuous

flow of learning opportunities and meaning-making acquisitions. School has lost its monopoly over the learning locus. The workplace, the home or sheer mobility (on-the-move) offer powerful loci of flexible learning.

Ubiquitous and distributed learning are taking over the norm, allowing the learner a much more effective management of his/her resources for learning.

The schematic diagram that follows illustrates four alternative educational paradigms and the challenge posed by flexible learning approaches.

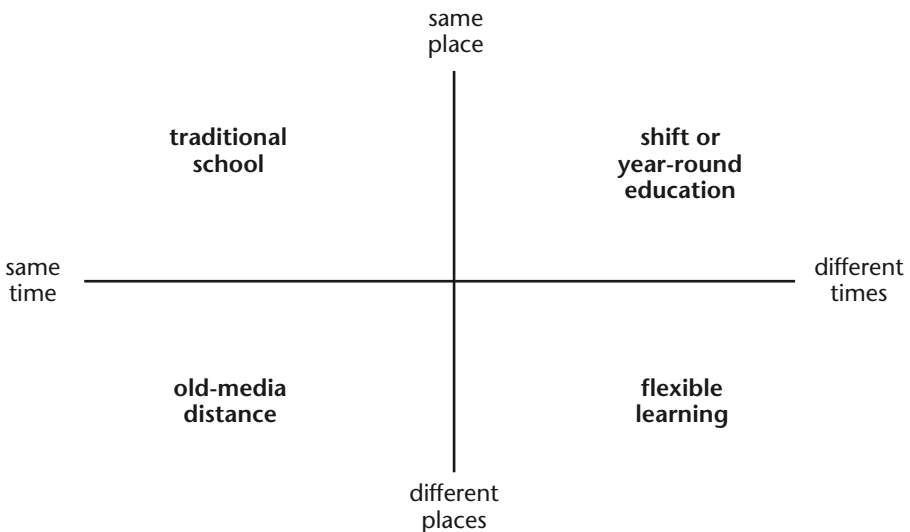
Technology steps in to empower both the learner and the educator.

The coming of age represented by increased personal sovereignty over space and time affects both parties concerned in the learning enterprise.

The prize-winning question remains in knowing whether or not informal and flexible learning will further empower the lifelong learner, particularly at the low learning end.

Flexible learning can turn into a resourceful paradigm to new education modes and to the creation of a new generation of learning environments.

The opening toward new opportunities of learning – and its underpinning technologies – stresses the fact that learning is always a collaborative activity, involving strong interchange within a community and between communities. These communities may be very broad, spanning disciplines, but having a common purpose (e.g. working more effectively) or related to a particular profession. They may be within a single (large) organisation or span many organisations. Systems for individual learning for work will therefore need to address issues of social interaction in a virtual world; the



**Figure 2 Four alternative learning paradigms**

automatic identification of communities of purpose within a population of learners; learner roles and behaviours; the creation and transfer of knowledge within a virtual learning community; and the ownership of knowledge created by learners within the system.

New learning acquires a strong relational flavour. By the same token, lifelong learning demands closeness and proximity.

Furthermore, catering for informal learning is recognising that it establishes and reinforces the foundations for advanced synergies between working, learning and innovating. Indeed innovation is always knowledge-based to the extent that innovation relates to a body of prior consolidated knowledge that it challenges.

However, little social and educational credit is given to learning in informal settings. Experiences of APL (accreditation of prior knowledge) and RPL (recognition of prior knowledge) remain scant and viewed with suspicion by gatekeepers of the formal systems of education and knowledge certification.

Therefore, investing in the theory and practice of translating life (and professional) experience into accredited knowledge and skills becomes a major challenge. In other words this leapfrog step entails understanding and mastering complex processes involved in the formation and sharing of “social knowledge”, that is, the centre of new lifelong learning communities and agendas.

New ICT generations, so-called network/digital natives, constantly explore the potentials of Web 2.0 (social networks) and Web 3.0 (semantic web + ‘internet of things’) in spreading informal learning narratives and tacit knowledge acquisitions.

Taken from this angle, the challenge posed to both policy-makers and researchers in shaping a new policy agenda for informal lifelong learning is formidable. It would stretch out to clarify and regulate pressing themes as:

- enabling the transformation of experience into consolidated and useful knowledge;
- legitimising in a socially credible way tacit knowledge acquired in non-formal and informal settings;
- overcoming traditional “monopolies” of codified knowledge;
- constructing a credible “catalogue” of tacit competencies, uniquely acquired and nurtured through the means of experience;
- deconstructing systems of merit and opportunities predominantly based on formal degrees and certificates (cultural capital);
- designing a new system of social signalling which would be capable of showing the effective value of experiential knowledge; and
- rewarding a community of “knowledge subjects” of informal knowledge and constructors of tacit competencies instead of multiplying “knowledge objects”.

Empirical research is now available from an extensive evaluative-research exercise conducted in Portugal on the New Opportunities Initiative (NOI), a sweeping public policy put in place in 2005 to qualify and upgrade a targeted 3.5 million low-skilled adults.<sup>13</sup>

The first results of research and extensive fieldwork show evidence of improved foundation skills for lifelong learning on the part of adults who have successfully completed NOI, particularly in:<sup>14</sup>

- literacy and e-skills (reading, writing, speaking, computer use and internet use) and evidence of changing daily habits following certification, especially having achieved the level of basic education;
- learning-to-learn skills (self-image and self-esteem, critical thinking, motivation for learning, learning strategies and participation in education and training), especially improved self-esteem and motivation for learning among the basic education achievers; and
- improved soft skills – personal and social skills, civic competence and cultural awareness and expression.

However, less progress is recorded in hard skills, namely in science and technology and in foreign languages.

The following radar plots provide a quick overview of these results for three dimensions of skills mastery: before certification, after certification, actual use in daily and working life.

These graphical representations shed light on impressive personal advances in skills – and to a lesser degree in academic knowledge acquisition – with particular emphasis on basic education achievement (9th grade equivalent). Lower progressions – although equally outstanding – are recorded in secondary education achievers (12th grade equivalent). In both instances, learning-to-learn skills and e-skills register enormous gains, as well as soft skills such as civic, socio-cultural and communication capabilities. To a much lesser extent skills in actual use are still reduced – a conclusion that discloses a mismatch between new skills obtained (and officially certified) and those actually needed by traditional job requirements and industrial settings.

A key lesson derived from this extensive *corpus* of empirical research is that the recognition of lifelong informal skills is instrumental to enhancing learning-to-learn levers for the most deprived segments of the low-skilled adults. This conclusion is epitomised in significant gains in self-esteem – the lowest ranking before participation; the biggest leapfrog after certification (basic education) – and in critical thinking skills – again the lowest-ranking in a work context and before lifelong learning participation. A robust enhancement of these personal attributes following certification (basic education), can be observed in the latter graph displayed in this section.

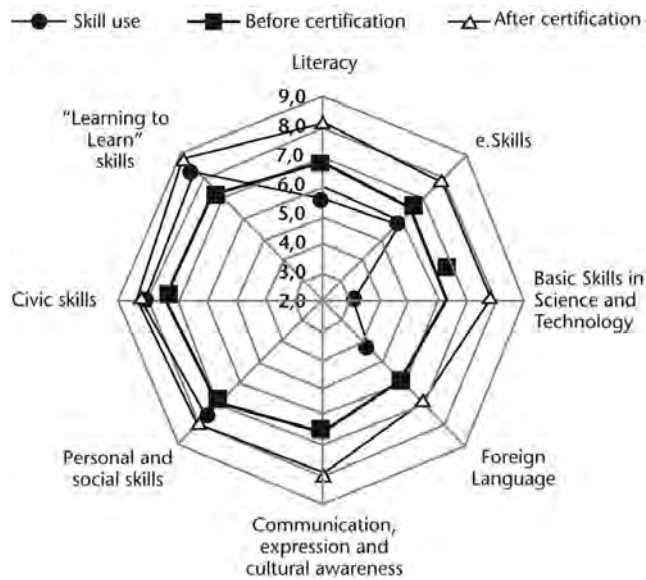


Figure 3 Skills summary – evaluation *versus* use in Secondary Level (grade 12)

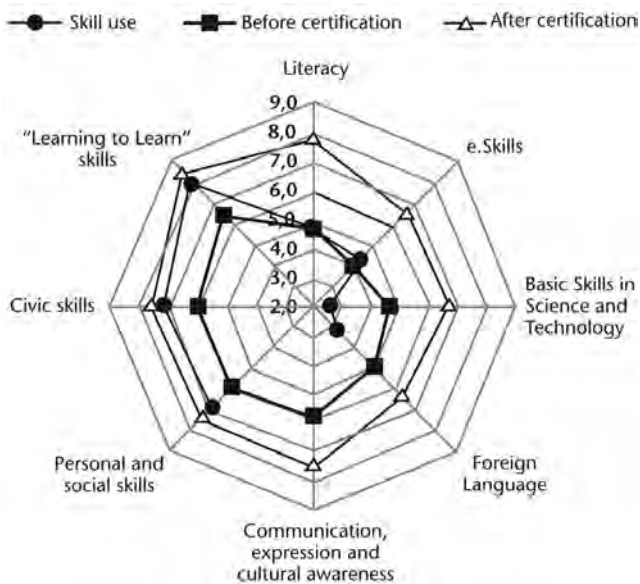


Figure 4 Skills summary – evaluation *versus* use in Basic Level (grade 9)



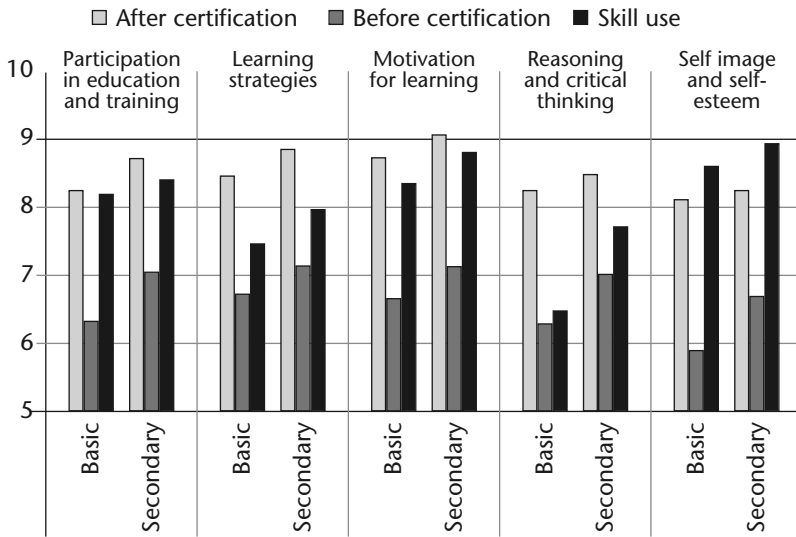


Figure 5 Learning to learn

## Generativism: setting the foundations for a new theory of lifelong learning

The traditional associationist theory – brilliantly designed under Thorndike's genius – influenced the entire pedagogical preferences of the 20th century. Under these assumptions, drill-and-practice coupled with bonds and rewards would suffice to address a core theory of aptitude distribution; the Bell curve provided with the undisputed statistical dogma. Teachers would qualify as semi-skilled workers with the prime duty of carrying out instructions designed by curriculum experts.

New learning theories emphasise a “new core” constituted by knowledge constructivism and learners who actively engage in self-management of cognitive processes. Constructivism sheds new light on the role of inter-subjectivity vis-à-vis social learning: knowledge is elevated to the category of personal and social construct, indivisible from cultural conditionalities and their forceful interplay. The road to knowledge and cognition is thus contingent on memory, history, language, ethnicity and affection.

Culture, in itself, acts as a powerful marker of knowledge appropriation and transmission. Symbolic language pervades the entire universe of knowledge; speech – naming things – is intertwined with thought. While learning results from the internalisation of social interaction, language provides the material foundation of thought.<sup>15</sup>

Intelligence ceases being treated as a natural and inelastic endowment.

Research shows that long-term immersion in demanding environments can favour the acquisition of robust “habits of mind”. Incremental expansion of intelligence is attainable through generative learning: a balanced combination of effort and ability, appealing to expert instruction and competent mentoring. Teachers’ abilities become critical and themselves expandable through effort and on-going professional development.

More recently a connectivism theory proposed by Siemens (2005) emphasises both the contemporary prevalence of *Homo mediaticus* and the multitude of learning opportunities derived from the sheer fact that a person remains intimately connected to the world. To a certain extent, connectivism is a pedagogical equivalent of Bruno Latour’s Actor-Network Theory and Luc Boltanskyi’s interpretation of a new spirit of capitalism as a connected system of actors. However, Latour’s proposition denying the role of the ‘social’ to interpret all narratives as a system of local networks is not entirely helpful to advance learning as a social and cultural endeavour.

To sum it all up, let us emphasise that it is commonplace to situate learning theories around some major milestones.<sup>16</sup> Thus, it is worth recollecting the four principal approaches to learning models that the specialised literature normally underlines:

- Behaviourism – based on the change of reflexive behaviour of a person with the help of external stimuli.<sup>17</sup>
- Cognitivism – based on exploring the mind (mental processes) while observing the change of the outside behaviour.<sup>18</sup>
- Constructivism – based on the premises that a learner actively constructs his/her own understanding through reflection on individual experiences and ‘talking to the world and letting the world talk back’.<sup>19</sup>
- Connectivism – our brains are changing and even formatted by technologies and our behaviour is shaping through the uses of technologies; know-how and know-what are being supplemented with know-where as the understanding of where to find the knowledge needed.<sup>20</sup>

Having identified these four major trends the following question should be: which of these four approaches do we find appropriate to address the challenges of learning throughout life in an ever-increasingly digital and connected world?

To further our thoughts on this urgent question we ought to clarify that our preference departs from the idea that we may be standing at the threshold of an exciting new era in education and learning. Indeed, the extraordinary development of Open Education Resources (OER) witnessed over the last couple of years suggests that we can dream of a ‘Learning Utility Agenda’. In other words, the availability of a vast infrastructure of learning opportunities, accessible anywhere and anytime from a variety of devices and platforms, as easily as one gains access nowadays to electricity, water or communications, sparks bold new visions in pressing agendas touching on

lifelong learning, key skills acquisition and informal learning recognition.

However, there is scant evidence that this ‘big bang’ of OER has led into the effective uptake in the educational arena of freely-available resources. Moreover, the real impact of OER on transforming actual classroom practices and inspiring new learning patterns remains astonishingly poor.

The gulf between an ever-growing supply of OER and the reluctance to adopt Open Education Practices (OEP) comes as no surprise. The truth of the matter is that this apparent contradiction embodies the clash between two traditional paradigms, a subject that was taken up earlier: developing knowledge ‘objects’ (a supply-driven strategy) vs. investing in learning ‘subjects’ (a demand-driven strategy).

Obviously, reality does not have to be a choice between one and the other. Both strategies should go together, hand in hand – which is rarely the case – to avoid major imbalances in the way how pedagogical innovation progresses.

Our existing portfolio of learning theories is barely enough to encompass the complexities underpinning a widespread policy of OEP. Behaviourism, cognitivism and constructivism were formulated in a pre-ICT Stone Age. Furthermore, these theories could not anticipate a “brave new world” made up of tech-rich environments, of soaring interactions in social networks built around Web 2.0, and of content availability without boundaries.

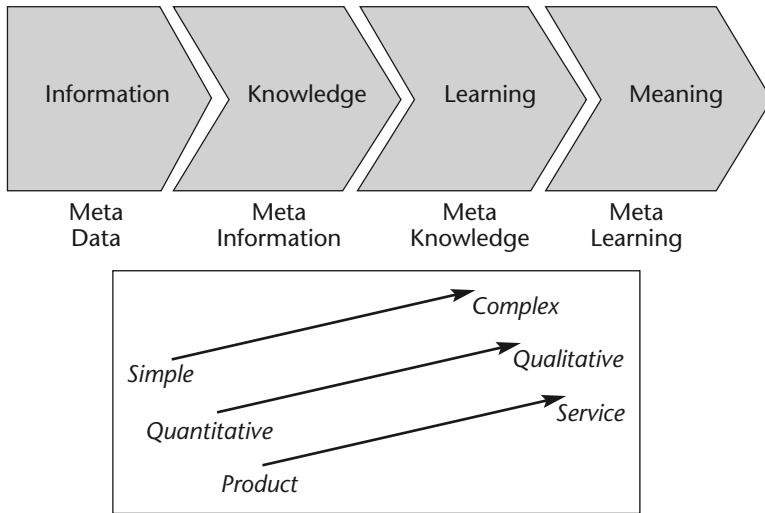
As for connectivism, however ingeniously the theory is presented and however attractive it may be, its basic claims of technology-enabled changes elicit the individual as the main locus of transformations – in brain functions and in behaviour. This understanding falls short of OEP to the extent that what may be fundamentally required are new sets of competences and different ways of enhancing social learning.

Having arrived at this juncture, the case that I would like to put forward is that OEP will only take-off in a sustainable course if we invest in people (learning subjects) – in their personal, professional and social skills – to make OER a powerful engine of new learning experiences.

Two philosophical theories dealing with scientific knowledge establish a marked distinction between the received view (RV) and the semantic view (SV). While the former (RV) deals with the passive collection or recollection of existing knowledge, the latter (SV) involves a full-fledged reconstruction of received knowledge and pre-supposes a constant quest for value-added meaning.

We have proposed a complete value chain ascending from raw data to information (metadata), from information to knowledge (meta-information), from knowledge to learning (meta-knowledge) and from learning to meaning-making (meta-learning). The effort to bridge the gulf between information access, knowledge gaps, learning inequalities and meaning-making disparities is epitomised in three transitions: simple to complex, science of quantities to science of qualities, product to service (Carneiro, 2008).

This value chain is important in understanding fully the progressions from RV to the construction of SV.



**Figure 6** The value chain: reaching for meaning

Indeed, the opposition RV-SV leads us to formulate a new semantic-driven syntax for OEP, a sort of fifth learning theory, accruing to and expanding from the previous four theories, one which we would like to call generativism (as opposed to adaptivism).

Generativism lies in the intersection between innovative learning and learning for innovation and addresses the foundations of a creative society. In this sense, the OEP challenge is to generate new knowledge (SV) out of previously-codified knowledge (RV). Generativism understood as a constant co-creation and re-creation of knowledge appeals to the unique human ability to derive new meaning from experience and to build sense out of a shared body of conventional knowledge.

Our proposition that generativism may provide a solid theoretical foundation for OEP leads to a number of crossroads and to a set of related queries:

- Can *generativism* inspire a sustainable spiral of knowledge generation, sharing and re-generation, embodied both in new knowledge objects and new learning subjects?
- Does *generative* OEP conceal the potential to unleash the latent productive and creative energies of people in organisations in order that ICT and new media finally fulfil their promise to enable and empower vibrant learning communities of practice?
- If OEP are regarded as a key ingredient of new lifelong learner-centred designs, how should we define a ‘competent learner of the future’: one who is endowed with the mastery and use of a whole new range of *generative* learning competences?

- Would enhanced *generative* skills in self-regulated (self-directed) learning and social (dialogic) learning spark a disruptive change in the pace of OEP uptake and diffusion?
- How may quality guidelines and self-assessment tools for OEP be best shaped to support self-sustained *generativism* and advanced lifelong learner competences?
- Could *generativism* position itself as a central concept for a renewed Web 3.0 (semantic, learning, smart, user-customised, evolutionary and ontology-rich in nature), one that would leverage OEP and allow the intelligent use of open resources to become a truly transformative and creative learning experience?
- Should *neotenia* emerge as a major field of OEP research in order to allow for increased *generativity* in quality adult-adult (teacher-learner, higher education, and adult education) interactions?

To sum up, and to draw these issues into a major research question, one may ask: Could we conceive of generativism as a key to re-launch and undertake learning throughout life in novel, distinct and flexible modes?

## Building a new social contract: towards full citizenship

Moving from rhetoric to actual implementation is still far from being achieved. Permanent and lifelong education has pertained to the educational lexicon for decades. Hence, it is necessary to open new avenues exploring life as a fundamental learning asset – not strictly in an expanded time horizon sense, but profiting from life's unique experience as an invaluable subject of reflection. Learning is inevitably a consolidation of dense inner journeys; it appeals to *The Treasure Within*.

Consciousness – brain research findings tell us – revolves around intricate mechanisms of knowledge-processing and selection based upon value carried out in the two components of our forebrain: the limbic system and the cerebral cortex. Purposeful conduct recalls the assistance of semantic memory, motivation and awareness.

*Conscious evolution* sets the stage for autonomy and meaning-making in the process of vocational identity formation. Placed at the summit of a long personal evolutionary chain, it stems from a robust landscape of consciousness<sup>21</sup> grappling with the deepest, most intractable dilemmas of vocation and identity, and grows increasingly wary of shallow activism.

In the absence of consciousness and vocational identity, learning lacks purpose, work is remotely associated with personal development, and the drive to learn is erratic. While intent is commensurate with vocational identity, personal and professional fulfilment are its main outcome.

In a global learning environment, *Education as a Right* finds a natural

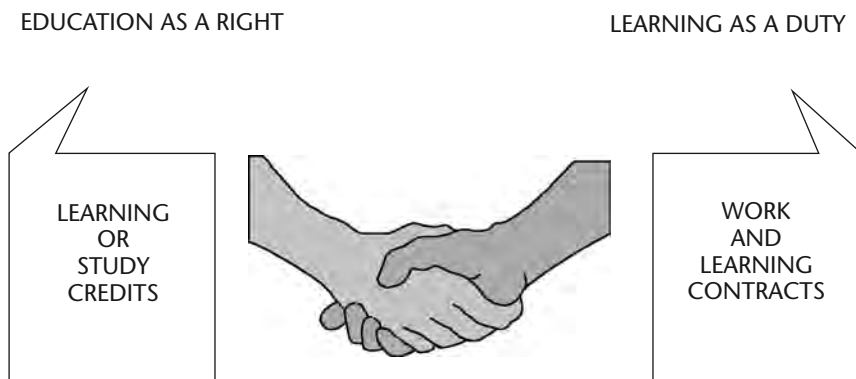
partnership in *Learning as a Duty*.

In other words, the New Millennium is a kind of void canvas that the theorists of the natural state so eloquently described. From Plato to Rousseau, Hobbes to Rawls, social philosophy sought supreme harmony through the formation of stable and lasting social contracts – contracts that are freely negotiated and that establish codes of conduct based on a balanced interplay between rights and duties in society.

It is worth mentioning, at this juncture, another remarkable human trait: that, unlike common animal sociality, human social existence stems from the genetic propensity to nurture long-term contracts that evolve by culture into moral precepts and laws.

We engage naturally in lasting covenants; moreover, we accept the necessity of securing them for survival: long-term friendship, family bonding, pertaining to a community, cultural links, national identity. Learning is also an enterprise of the communal mind; one of its fundamental principle is ethics and catering for our foundation institutions of sociality.

Thus, a learning society posits a sovereign opportunity: to establish a new equilibrium between social rights and individual duties. Also, a time to reconcile individual and collective – or cultural – rights.



**Figure 7 New citizenship: rights and duties**

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During an address to high-ranking representatives of the European social partners, assembled in Thessaloniki, we proposed the following concept:<sup>22</sup>

“The social contract is mostly an implicit agreement, accepted by all parties concerned. The post-war social contract, which lasted successfully for some 50 years, is at present grossly outdated. This terminal stage is becoming apparent in a number of assumptions that no longer hold

today: stable and full employment; the benefits of the welfare state; a limitless economic growth machinery; absolute faith in democratic governance; a strict separation between constitutional powers.

There remains little doubt that unless a new concerted effort is put into practice to produce a different social contract, tailored to serve the complex information society and to make the most of the learning challenges, our societies will run into growing difficulties. In this new contractual approach, the economy will go on playing an important role; however, it is neither the sole nor the primordial factor. Full citizenship standards, striking a right balance between duties and rights, will increasingly call upon values such as justice, fairness, equity and solidarity in both our national and international orders."

Conscious citizenship lies at the root of participatory democracy. Participation demands a threshold level of social capital and trust capable of upholding higher-order common purposes. This sphere of public interest surpasses the simple rights of individuals to affirm their differences.

This is the reason why democratic rule is at the heart of citizenship education. Making allowance for a learning society is closely tied in with deepening democratic beliefs and committing future generations to perfecting democracy or, to put it in different words, building the foundations of a new social contract that elicits education, knowledge and learning, as the key ingredients of a new deal.

As Delors forcefully reminds us in the report that inspires this paper, it is always necessary to remind us where the true treasures lies :

*But the old man was wise  
To show them before he died  
That learning is the treasure*

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# 2 Evolution of and perspectives on lifelong learning

Adama Ouane<sup>1</sup>

## Introduction

At a time when the world's citizens are increasingly in need of lifelong learning opportunities, it is imperative that we reassert the inalienable right to education. Lifelong learning is the only way to survive and cope with the challenges associated with sustainable development and personal fulfilment. Although more governments have acknowledged the crucial role that lifelong learning plays in building a sustainable and socially cohesive future – and in equipping individuals to learn how to know, to do, to be and to live together – the root causes of marginalisation in education have yet to be addressed in a comprehensive way and for all citizens, particularly those who are economically and socially deprived.

There are still 759 million adults who have had no schooling or other opportunities to become literate. This represents about 16% of the total world population aged 15 and over – of whom nearly two thirds are women. Furthermore, the 2010 EFA *Global Monitoring Report* underlines the fact that, while the number of children not attending school continues to fall, there are still 72 million children out of school. The most recent school enrolment data suggest that the goal of Universal Primary Education by 2015 will be missed. Moreover, household survey evidence suggests that more children may be out of school than the official data indicate.

All this points to an increasing need for educational change and shows that, in addition to being a right, education is a means to fulfil other rights. It gives learners the tools to push the boundaries of what is known, to invent new realities or to seek new understanding from existing realities. It is a balancing act between freedom and constraint.

As Amartya Sen affirms, the stock of human capital is the sum totals of doings and beings, these abilities determine a person's ability to be both functionally employed and happy. Since education affects the "capability"

of what a person can “be” or “do”, it also deeply affects the amount of positive freedom available to him or her: freedom to shape his/her own life in terms of type of work, profession or entrepreneurship. In addition, as Jacques Delors indicated in the report of the Commission on Education for the Twenty-first Century, that he chaired and entitled *Learning: The Treasure Within* education is about transmitting and anticipating what humanity has learned about itself. Delors’ famous four pillars of learning,<sup>2</sup> highlighted the fact that education must be a process of learning about preparing for and participating in democratic life.

This paper will trace the evolution of lifelong learning. It is an attempt to expand the concept and mobilise political support for a new course of action embedded in the UNESCO Director General’s call for a “New Humanism”.

## Lifelong learning: Still a vision? A brief historical overview

The roots of the lifelong learning concept can be traced back to ancient times. The term itself, however, first gained currency following educational expansion in the wake of World War II. It grew from notions such as “fundamental education”, “continuing education”, “basic education”, “permanent education” and “recurrent education”.

More than three decades ago, the Faure report *Learning to Be* (1972) advocated lifelong education as the master concept for educational policies in both developed and developing countries. This report was commissioned by UNESCO following demonstrations by students and young people all over the world in 1967 and 1968. It was seen as a turning point and the start of a period of optimism in international education policy, as it recognised that education was no longer the privilege of an elite, or a matter for one age group only. Instead, it concluded that education should be both universal and lifelong. Essentially, this meant moving to a humanistic, rights-based and holistic view of education.

By the mid-1990s, a clear preference emerged for the term “lifelong learning” rather than “lifelong education”. There were differing views on the major distinction between these two concepts, but it was generally felt that “lifelong education” reflected a view of education as a prescriptive and normative process, while “lifelong learning” put the emphasis on learner demand and individual choice. The European Union Year of Learning (1996) consolidated these trends. Some critics, however, have suggested that this change pushes for an individualisation of learning, prompted by economic policies aimed at disengaging governments and shifting costs and responsibility to individual learners.

Furthermore, the Report *Learning: The Treasure Within* (1996) reiterated the essential role that learning throughout life plays for both society and individuals, equipping them to cope with the evolving requirements of the

labour market and the changing timeframes and rhythms of individual existence. Together with the Faure Report, the Delors Report acknowledged lifelong learning as one of the guiding and organising principles of educational action and reform, as well as a notion that fosters meaningful human life by enabling people to anticipate and tackle whatever challenges they may face in the course of their lives. As Colin Power<sup>3</sup> said, however, the Delors Report is not a blueprint for educational reform; it is a framework for reflection and debate about the choices which must be made in formulating policies.

Following the Delors Report, lifelong learning has become a focal point for discussions in the international arena. Initiatives such as the *Hamburg Declaration* in 1997 (CONFINTEA V), the Dakar Framework for Action in 2000, the United Nations Literacy Decade and the UN Decade of Education for Sustainable Development have all indicated the importance and relevance of lifelong learning and its humanistic approach in the 21st Century – even though lifelong learning is not clearly addressed within these initiatives. In particular, there is no mention of lifelong learning in the UN Millennium Development Goals (MDG) despite its links to the EFA initiative.

In 2008 and 2009, lifelong learning was an anchor for UNESCO's four major international conferences – the 48th International Conference on Education (ICE, November 2008), the International Conference on Education for Sustainable Development (March 2009), the International Conference on Higher Education (July 2009) and the Sixth International Conference on Adult Education (CONFINTEA VI, December 2009). All of these events underlined its critical role in addressing global educational issues and challenges. In addition, it will feature prominently in the first major global conference dedicated to Early Childhood Care and Education (WCECCE), which is scheduled for September 2010.

Moreover, during the 35th General Conference of UNESCO in October 2009, many delegations underlined that Education for All should become Education for All at All Levels throughout Life, implying universal lifelong learning. It would seem, therefore, that there has been a move towards the recognition and acceptance of lifelong learning. Our task now is to see that vision become reality.

## Lifelong learning as a facilitator

### *For social inclusion*

One of the greatest problems faced by the world today is the growing number of people being excluded from participating in the economy, society and life in general. Unjust and inequitable societies are neither efficient nor secure – they are unacceptable. More far-reaching policy measures and broader socio-economic and cultural investments are urgently called for, and

education is one means of addressing such issues. Overcoming injustice should be at the heart of all national and international Education for All agendas.

Essentially, inclusion entails ensuring that every individual receives appropriate, good-quality education within and beyond the school system. It is the full and effective exercise of the right to education, i.e. access to learning opportunities, that discriminates or excludes no individual or group within or outside the school system. It offers learners self-expression and the fulfilment that success and educational achievement bring. It covers issues of gender, ethnicity, class, social conditions, health and human rights. Inclusive education is about learning to live with diversity and learning to learn from difference, not only in a certain period but throughout the entire lifecycle and in a variety of contexts.

Lifelong learning has increasingly been acknowledged as an important element in the response to social exclusion, as it has a range of benefits to offer to both individuals and society.

### *For sustainable development*

Lifelong learning contributes to Education for Sustainable Development (ESD) as it is a continuing process that promotes well-being on all three levels of sustainable development – economic, social and environmental. The values and principles underpinning sustainable development should enable learners to identify problems and reflect on them critically and analytically as a means of addressing local and global challenges and of shaping a sustainable future.

The outcome document of the UNESCO World Conference on Education for Sustainable Development – the Bonn Declaration – called for action to “support the incorporation of sustainable development issues using an integrated and systemic approach in formal education as well as in non-formal and informal education at all levels... also by recognizing the significant contribution of non-formal education and informal learning as well as vocational and work-place learning”. By harnessing education to promote values such as respect, justice and equity, we can build sustainable financial and economic systems that respond to the crisis that our world is currently undergoing.

## Lifelong learning as a comprehensive, integrated and holistic system (formal, non-formal and informal)

### *The need for a new curriculum*

Our ability continuously to acquire new competences, knowledge, skills, wisdom and behaviour is probably our most distinctive feature, and plays an important role in our fast-changing world.

The holistic and humanistic nature of lifelong learning allows people to develop competences that enable them to perform confidently and with ease the roles required in different settings, as family members, friends, workers, employees and entrepreneurs, members of society, and as national and – ideally – world citizens. It enables them to take responsibility for themselves and others, to organise their lives not only from the standpoint of economic and material wealth, but also in pursuit of happiness and well-being. In addition, current social and economic realities in both developed and developing countries, including the rise of ICTs, demand new, wider and more complex competences, such as the ability to think critically, be creative, cope with rapid change, nurture the environment, solve problems and act responsibly and ethically. It is only when equipped with these capacities that individuals will be able to grasp and deal with both the enormous potential available, and the rapid transformations which are currently taking place.

As these capacities affect the whole dimension of the individual and the spectrum of society, educational provision enabling their acquisition must be available through all channels: formal, non-formal and informal. Today's individuals and citizens need access to multiple modes of education, diverse learning situations (home, community, workplace, school, leisure, and so on) and a variety of media (books, computers, games, traditional media, and so on). Formal learning is like riding a bus. The driver decides where the bus is going; the passengers are along for the ride. Meanwhile, non-formal learning is like riding a bike. Here, it is the rider who chooses the destination, the speed and the route.

The crucial question with which we are faced is: given that the capacities that people need to succeed in today's world cannot be provided by one form of education alone, how can a curriculum respond to demand, anticipate necessary changes and cater for both formal and non-formal learning?

What is needed is an approach to education that accepts that learning is a continuum that ranges from formal to non-formal and informal learning and encompasses all people at all stages of life. Lifelong learning must therefore be seen as the overarching guiding and organising principle for educational reform and action for all countries. It is a critical means of addressing global educational issues and challenges. As a result, curricula based on a vision of learning as a lifelong endeavour are holistic, humanistic and inclusive. They provide diversified contents, based on inclusive, emancipatory, humanistic and democratic values. They are all-encompassing and integral to the vision of a knowledge-based society. Lifelong learning curricula cater for the needs and demands of different groups, address the individual's cognitive, emotional and creative development and cover general, technical and vocational education and training. Culture is the motor and the individual's well-being is the aim. Such curricula should be supported by the strong pillars of learning: learning to know, learning to do,

learning to live together, learning to be and learning to learn. They should be tailored to reflect changing needs and demands, and geared towards a range of target groups.

Furthermore, lifelong learning, education for sustainable development and inclusive education all focus on challenging the very culture and notions of conventional teaching and learning. Hence, there is a need to craft appropriately diverse and flexible forms of provision. New modes of learning are emerging, including community learning, social learning, adult learning, intercultural exchange, active learning, intergenerational learning and self-directed learning. A sector-wide approach enables us to look at learning in new ways and take account of lifelong learning, including informal and non-formal learning, as well as mechanisms for the recognition of prior and experiential learning.

All of this points to a further crucial need: a new and comprehensive training-of-trainers system that caters for the combination of formal, non-formal and informal learning that an all-encompassing vision of lifelong learning entails.

## Recognising and validating lifelong learning

If we can be sure of one thing, it is this: without recognition and validation of non-formal and informal modes of learning there will be no lifelong learning.

As lifelong learning values all kinds of learning experiences, learning outcomes should be recognised and validated independently of how, where and by whom they are acquired. Yet, despite the fact that it is undoubtedly a useful and forward-looking concept, current educational policies and practices have so far tended to overlook or avoid it.

An in-built mechanism of recognition, validation and accreditation for all kinds of formal, non-formal and informal education must be part and parcel of lifelong learning. A system of this kind would both eliminate “dead ends” along the road to education, training and learning, and ease the transition between different modes and levels of education and training, by making learning more flexible and facilitating the inclusion of disadvantaged groups. Furthermore, the recognition and validation of non-formal and informal learning could succeed in ensuring that all education policy documents make reference to lifelong learning, thereby laying the foundation for educational provision and participation across the full continuum of learning contexts, building a sector-wide approach to lifelong learning into the system from the top down.

In collaboration with different regions and specialist organisations, the UNESCO Institute for Lifelong Learning (UIL) and the French National Commission for UNESCO carried out a large international survey covering

some 50 countries, and started work to set up an International Observatory on country policies, approaches and assessment tools pertaining to the recognition, validation and accreditation of non-formal, informal and experiential learning experiences. UIL expects to publish guidelines for RVA by the end of 2010.

Meanwhile, the OECD has launched the “Recognition of Non-Formal and Informal Learning” (RNFIL) programme, and the European Union has developed a comprehensive recognition and validation system as part of its Lifelong Learning Programme (2007–2013). Although much remains to be done, real and measurable progress is being made towards cementing the crucial link between RVA and lifelong learning.

## Translating the vision of lifelong learning into reality: An overview of policies worldwide

As indicated above, lifelong learning is not a new concept. However, it has gained a new and expanded significance in recent years as a means of systematising and organising learning in a more comprehensive and equitable way.

From a historical point of view, the evolution and implementation of lifelong learning can be divided into the following broad categories.

First, there are national approaches to lifelong learning, which comprise:

- countries with a long-established tradition of lifelong learning like Japan, Korea and the Scandinavian countries;
- recent national policy drives in developed countries; and
- recent policies in developing countries.

Second, there is the international approach which can be summarised in terms of:

- the recent role played by international and supranational bodies in the development of lifelong learning, i.e. the pioneering role played by UNESCO, the Council of Europe, OECD, the Southern African Development Community (SADC) and the ASEM Education and Research Hub for Lifelong Learning.

### *Countries with established traditions of lifelong learning policies*

#### **Japan**

Japan has strong laws and policies supporting the promotion of a lifelong learning society and the provision of a wide variety of adult educational activities.

The Japanese lifelong learning system has several notable strengths, such



as Kôminkan institutes, whose purpose is to provide the people living in the municipal area with education, learning and cultural opportunities, a wide variety of certification programmes and on-the-job training with local businesses.

In 1990, the Japanese Diet enacted the Law for the Promotion of Lifelong Learning. In 2001, the Lifelong Learning Promotion Bureau was set up by the Ministry of Education, Culture, Sports, Science and Technology (MEXT), aiming to shift the focus of educational policy as a whole to a lifelong learning system. This Bureau coordinates lifelong learning policy and practice at all levels and collaborates with local governments.

In 2006, the term “lifelong learning” was added to Japan’s educational charter, the Fundamental Law of Education. Following this amendment, discussions are now centred on defining the kind of lifelong learning policy that Japan should construct.

### **Republic of Korea**

Korea was officially exposed to “lifelong education” when article 31 of the Constitution was amended in 1980: “The State is responsible for promoting lifelong education”. In 1982, the Social Education Act was adopted as the legal and policy framework for non-formal and adult education.

In May 1995, the presidential commission put forward Proposals of Educational Reform for the Establishment of the New Educational System, which have since been enacted by the national government. The commission’s aim was to develop an infrastructure for an open and lifelong learning society by introducing a credit bank system, which recognises various learning experiences as credits, and awards academic degrees and qualifications accordingly. Its objective is to provide citizens with greater access to different learning systems as well as to recognise different learning activities.

The Lifelong Education Act of 2007 clarified the scope and field of lifelong education at the regional level. At the national level, meanwhile, the centralised National Institute for Lifelong Education was launched under the Ministry of Education, Science and Technology in February 2008. The Act makes it compulsory for local governments to establish their own lifelong education promotion plans, and to form regional committees for the implementation of such plans.

### *Recent national policies in developed countries*

#### **UK**

The 1998 Green Paper entitled *The Learning Age* looked at how learning throughout life can build human capital by encouraging creativity, skill and imagination. It argued that enquiring minds and a love of learning must be fostered in order to guarantee future success.

Other government papers followed: *Learning for the 21st Century* in 1998; *Learning to Succeed* in 1999; *21st Century Skills: Realising our Potential* in 2003;

and *Further Education: Raising Skills, Improving Life Chances* in 2006. All of these documents have focused on strengthening the UK's economic position through vocational training, further education and improved employability.

### **Australia**

Lifelong learning as a term started to be used with increasing frequency in Australia from 1995 onwards. Since then, lifelong learning has been placed firmly on the schools agenda through the *Adelaide Declaration on the National Goals for Schooling in the Twenty-First Century*. This key document was endorsed in 1999 by Education Ministers committed to working together in order to ensure high-quality schooling for all young Australians.

### **Norway**

In pursuing its vision of lifelong learning and seeking to keep pace with rapid social change, Norway has been reforming its education system since the 1990s. As well as a reform of adult and continuing education and training, it implemented its so-called Competence Reform. The general objectives of these reforms are to increase the population's skill-base, ensure quality and create a better-integrated and more coherent educational system and educational policy.

In addition, the reforms aimed to: encourage people to accept that further learning serves individual development; guarantee a right to primary, lower and upper secondary education; document and recognise non-formal learning by adults; give employees the right to receive learning leave; remove tax disincentives to learning; and restructure public education to meet workplace learning needs. The Competence Reform also commits labour market authorities such as the Aetat to keeping individuals better informed of occupational and learning opportunities.

### **Estonia**

The Law on Education of the Estonian Republic was adopted in 1992, setting forth the general principles of the Estonian system. The subsequent Law on Adult Education (November 1993) laid down the legal conditions for training adults, along with legal guarantees for lifelong learning. In 2004, the Estonian National Plan for Social Inclusion was adopted.

According to Statistics Estonia, the general participation rate in lifelong learning was 6.5% in 2006, which is a long way off the EU's 2010 goal of 12.5%. In 2006, in an effort to improve participation in lifelong learning, the Government adopted a lifelong learning strategy designed to develop financing schemes, improve access for disabled and ethnic minorities, extend the vocational qualification system and ensure that adult education programmes are in line with EU standards.

### *Recent national policies in developing countries*

#### **China**

The Chinese government has issued a series of laws, regulations and policies on lifelong learning in recent years. The 1995 National Education Law stipulated that the State operate a lifelong education system and create conditions enabling its citizens to learn throughout life. Three years later, the Education Invigoration Action Plan for the 21st Century noted that a lifelong learning system would be established throughout the country by 2010.

Other initiatives have been adopted over the years, such as Distance Education 1999, carried out in collaboration with the Central Broadcast and Television University. In 2004, the Ministry of Education published *Guidelines for the Further Promotion of Community Education*. Wide-ranging activities have been carried out in many provinces to establish learning associations, cities, enterprises, communities and families.

#### **Thailand**

Thailand introduced the National Education Act in 1999 to respond to an urgent need to reform the curriculum and improve educational management in the face of its economic, social and educational crisis.

#### **Namibia**

Namibia's foundational document on education, *Towards Education for All*, includes a commitment to lifelong learning. To date, there have been three national development plans (NDP) presenting the country's roadmap for social and economical development culminating with the Namibian Vision 2030.

To that end the education and training sector has adopted the Education and Training Sector Improvement Programme (ETSIP), whose key purpose is to substantially enhance the sector's contribution to the attainment of strategic national development goals and to facilitate the transition to a knowledge-based economy. The ETSIP document stipulates the need for a broad learning programme that supports disadvantaged people in their efforts to break out of the cycle of poverty by improving equity and access to high-quality lifelong learning opportunities.

#### **Latin America and Caribbean**

As far as the Latin American and Caribbean countries are concerned, the CONFINTEA VI preparatory conference in Mexico in 2008 showed that the lifelong learning paradigm has yet to permeate educational debate in the region and in some cases is even perceived as an "endogenous implant". The Regional Synthesis Report for CONFINTEA VI indicated that most national and regional education initiatives and plans refer to lifelong education in relation to the adult population; however, lifelong learning is often cited as a separate line of action or goal rather than as an overarching category.

Despite the general lack of specific legislation on lifelong learning as such, national reports prepared for CONFINTEA VI do indicate that advances have been made in terms of legislation and policy in the majority of the Latin American and Caribbean countries. There is increased recognition of the right to education as well as of linguistic and cultural diversity. Youth and adult education has been included in recent national education reforms and plans, along with specific lines of action and goals.

### *International approaches*

The EU, the OECD, the World Bank, UNESCO and SADC all have different view of what the aims of lifelong learning should be. Whereas the World Bank and the OECD focus primarily on the economic rationale of lifelong learning, UNESCO and SADC have a more visionary and inclusive understanding of the term.

After the 2000 Lisbon Strategy and the *Memorandum of Lifelong Learning*, the European Union launched a project entitled “Making a European Area of Lifelong Learning a Reality” in 2001 and expanded its definition of the term to include “personal fulfillment, active citizenship, social inclusion and employability and adaptability”. UNESCO, meanwhile, was the first international organisation to develop the concept’s holistic dimension. Lifelong learning is an area that chimes with the organisation’s call for a New Humanism, and has the potential to provide an incisive and long-term response to globalisation and the current economic crisis.

However, all of the organisations mentioned above share the view that learning is meant to be for all, that it should continue throughout life and that there is a need for strong co-operation between the formal, non-formal and informal education sectors. It is clear, therefore, that synergies should be established between these organisations that would allow them to combine their respective strengths and pool their considerable competencies. Together, they have the potential to harness the power of lifelong learning to make a genuine difference worldwide.

## What next?

### *Correcting misunderstandings*

There is resistance to lifelong learning, as many view it as “Western” education that is linked purely to the economy, skills and employability. But this is wrong. Lifelong learning is neither a new concept, nor a system for rich and developed countries only. It is not related exclusively to the economy and market demands; it caters also for inclusion, citizenship, leisure and joy. More must be done to foster general acceptance of the holistic and humanistic nature of lifelong learning. Confusions and fears surrounding the term must be pushed away. Yet how do we achieve this?

- First, the concept of lifelong learning should be clarified, underlining the fact that it is not limited to adult learning alone. It concerns children, youth and adults. It covers formal, informal and non-formal learning across the entire education continuum. It should be acknowledged that a “common definition” of the term cannot exist for the simple fact that systems vary not only over time but also between regions, countries and different fields of study.
- Second, it should be emphasised that lifelong learning is key to Education for All. The world has been mobilised to strive for EFA, yet five years before the initiative is scheduled to end, the figures are far from encouraging. It has become clear that EFA has proven limited – and limiting. It is time, therefore, to expand the focus of the EFA initiative to incorporate lifelong learning, and to accept that if we are to guarantee the universal right to education, the initiative needs to address citizens’ learning needs in the broadest sense and not just their most basic needs.
- Third, it is imperative that policy-makers be encouraged to take lifelong learning on board, and that they envision education and learning as a unified system made up of integrated and interlinked components that span an individual’s lifetime.

## Towards a new development in lifelong learning: Updating the Delors Report

The Delors Report, *Learning: The Treasure Within*, recognised that lifelong learning is an essential means of equipping human beings to live meaningful lives and meet whatever challenges they may face along the way. Taking into account the decisive influence of the world markets and the ways in which the world of work had changed, the report reflected a rights-based, humanistic, transformative approach to learning. It underlined the need to foster skills and attitudes that would enable people to overcome their religious and cultural differences and coexist peacefully, while at the same time linking learning to shared human, moral and ethical values.

In our fast-changing world, even a key document with the relevance and prescience of the Report of the Commission on Education for the Twenty-first Century, chaired by Jacques Delors, must be updated to capture recent changes and meet new demands. There have been calls from many scholars and in several meetings, like the Conference on Lifelong Learning and Sustainable Development (Leiden, the Netherlands, April 2008); the First Global Forum on Lifelong Learning (October 2008); and the UNESCO World Conference on Education for Sustainable Development, (March 2009) to revisit the Delors Report in order to respond to new demands for lifelong learning.

In addition to the four pillars of learning laid down by Delors, we should

consider adding three new pillars that capture and reflect the constant flux and forward momentum of the modern world:

- First, “learning to learn”, which is both the foundation of lifelong learning and the means to achieve it. It is a “transferable” skill that supports the remaining pillars and encourages learners to shoulder the responsibility for their further learning. Nurturing it is both an individual and a collective duty.
- Second, “learning to transform”, which enables the learner to cast a critical eye on the status quo, with the aim of changing the current situation to ensure a better life.
- Third, “learning to become”, which encompasses all learning outcomes, thus enabling learners to develop both as individuals and as members of a wider and more inclusive society.

There is one further reason for reviewing the Delors Report: while it centres on why lifelong learning is important, it fails to ask what it is important for. Nor does it examine the universal relevance of lifelong learning to the societies and individual citizens of the world, irrespective of their status and differences. There is a clear need to delve deeper into the truly foundational nature of lifelong learning, in terms of both its outcomes and its potential as a transformative process.

## Learning to learn: Unearthing new pillars of learning

One of the four pillars of the Delors Report is “learning to know”, which it defines as a type of learning that “is concerned less with the acquisition of structured knowledge than with the mastery of learning tools. It may be regarded both as a means and as an end of human existence. Looking at it as a means, people have to learn to understand the world around them, at least as much as it necessary for them to lead their lives with some dignity, develop their occupational skills and communicate with other people. Regarded as an end it is underpinned by the pleasure that can be derived from understanding, knowledge and discovery. Learning to know implies learning how to learn by developing one’s concentration, memory skills and ability to think.”<sup>4</sup>

It is tempting to broaden the pillar “learning to know” by renaming it as “learning to learn”. On closer inspection, however, it becomes clear that we are dealing with two separate, if closely interlinked, pillars. Knowledge today is seen as a product of and a process within the current knowledge economy and underlying learning societies. It is created in various settings and institutions and is simultaneously an integral part of and an outcome of learning. Hence, learning to know must remain a foundational pillar.

Meanwhile, the fast-paced nature of the modern world has created an ever-more pressing need to adopt and adapt skills that enable both survival and success: hence, in order to learn to know, we must now also learn how to learn.

Learning to learn also completes other pillars, such as learning to live together, learning to be and learning to do. It can thus be viewed both as a transversal pillar and as a stand-alone pillar of the learning edifice. Learning to learn is the ability to pursue and persist in learning, to organise one's own learning, managing time and information effectively, both individually and in groups. It encompasses all forms of learning – including learning-unlearning and re-learning – and aims to shape the future rather than merely adapt to it.

Learning to learn is not only foundational and transversal; it is motivational. To learn, we need to interact with others, and by interacting with others, we are galvanised to pursue further learning. It fosters reflection, autonomy and responsibility, and nurtures individual learning styles while planting the seeds of curiosity and creativity in learners' minds. As a competence, it is the "master key" that unlocks all other crucial competences.

Learning to learn is included in the European Framework of Key Competences (European Parliament and Council 2006) and was chosen by the Education Council in 2007 as one of the indicators required to measure progress towards achieving the Lisbon objectives in education and training. It is a prerequisite for lifelong learning; thus, it is vital that an accessible, conducive and differentiated (i.e. formal, non-formal or informal) learning environment be provided to citizens – particularly those on the margins (special needs, school drop-outs, adult learners).

In brief, "learning to learn" makes individuals aware of their learning preferences and strengths, and of the ways in which they can motivate and equip themselves to succeed in all walks of life. In view of this, and in addition to the four defined pillars of learning, the meta-pillar "learning to learn" should be viewed a stand-alone pillar.

As outlined above, there is a strong case also for adopting additional pillars that adequately reflect the constant flux and forward momentum of the changing world, namely: "learning to transform" and "learning to become". These pillars entail the development of a range of competences:

- the ability to work out how to tackle new tasks;
- the ability to apply competences to new situations;
- the ability to analyse and organise the knowledge acquired;
- the ability to handle, with skill, the relationship between the general and the particular;
- the ability to relate knowledge to action;
- the ability to take risks;
- the ability to direct and re-direct change;

- the ability to adapt rapidly to change; and
- the ability to deal with societal transformations in order to face the challenges ahead.

It is evident that these pillars must be authentic, i.e. they must continue to reflect and support the very foundations of the learning edifice and not be distracted or diluted by elements which, though relevant, are not truly foundational. It is perhaps this concern that led the Delors Commission to exclude the meta-pillar of “learning to learn” from the list of foundational pillars in 1996. Hence, although the rapid change that has characterised our world in the intervening years seem to point clearly to a need for new pillars, we must seek a very broad consensus before adding these to the list; failing to do so might see these pillars swiftly transformed into pillories.

## Conclusion

Lifelong learning is the only comprehensive system in existence that has the breadth of vision needed to respond to the needs of all learners, and which addresses all modes and contexts of learning. It is unique in being both people-centred and human rights-based. It focuses on equipping individuals with the competencies they need to face everyday tasks and challenges, and to be not only good and productive workers and employees, but above all critical, creative and responsible citizens – or simply caring and committed individuals who respect their fellow humans and the environment.

The potential of lifelong learning to transform lives is thus immense and far-reaching. It can help alleviate poverty, combat inequality and extremism, foster inclusion and promote world peace. Crucially, in these globalised and often seemingly fragmented times, it encourages people to live together as social beings who understand and respect themselves and others, tolerate diversity and are always open to dialogue and new perspectives.

In view of all this, it is now crucial that lifelong learning be considered the moral duty of every world citizen. It is high time for lifelong learning to be accorded the full recognition that it deserves and made an integral part of all educational policies.

In a world that is becoming increasingly individualist, we must push away our fears and misunderstandings and turn the page to usher in a new era of humanism and lifelong learning. Indeed, as the key to unearthing, strengthening and promoting cross-cultural values and understanding, lifelong learning is the New Humanism.

To invest in education is to invest in humanity, and lifelong learning is the guiding light, the tool box and the life blood of human development and empowerment. So let us work to banish our fears and misconceptions, and move forward together to take action.



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# 3 Lifelong learning: moving beyond Education for All (EFA)

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*This text is based on the keynote speech delivered at the “International Forum on Lifelong Learning” held in Shanghai World Expo 2010 (19–21 May 2010). It benefits from some presentations and discussions held during the forum as well as from informal conversations with colleagues*

## Introduction

Over the past two decades, the world has experienced profound changes. A rapid globalisation process has resulted in a highly connected world, with economic and political power more concentrated than ever. Many old structural problems have further deteriorated or become more evident to public awareness, while new ones have emerged. Technology has undergone impressive leaps, bringing with it new possibilities as well as new threats. All these developments have major consequences on people’s lives around the world, as well as on education and learning systems.

However, the education field continues to revolve around the traditional “education reform” mentality. More money and resources devoted to doing basically more of the same. Top-down policies and measures. “Improving the quality of education” instead of revisiting it. Quantities predominating over qualities. Education understood mainly or solely as school education. Access, retention and completion rates as main (school) education indicators. Tests aimed at evaluating how much information students are able to digest and retrieve. Weak attention to learning, easily confused with testing and school achievement. Overburdened curricula attempting to capture as much content as possible. And so on and so forth.

All this is apparent not only at the national but also at the international level. World platforms such as Education for All (EFA), coordinated by UNESCO, are not tuned with lifelong learning, the new emerging paradigm, adopted over the past few years by many countries in the North, especially in Europe, and promoted by many international agencies, UNESCO being one of them.

We focus here on the relationship between EFA and lifelong learning, and argue in favour of revisiting EFA in order to better adjust it to the lifelong learning paradigm and to the changes experienced by the world since 1990, when EFA was initiated worldwide.

## Education for All (EFA) – far from lifelong learning

The Education for All (EFA) world initiative was launched in 1990 (Jomtien, Thailand) and ratified in 2000 (Dakar, Senegal). In Dakar, a new deadline was established (2015) given the fact that the six EFA goals were not accomplished 2000 (Torres, 2000). The goals remained six but were slightly modified (Box 1).

### Box 1

#### Education for All goals (1990–2000–2015)

##### Jomtien: 1990–2000

1. Expansion of early childhood care and development activities, including family and community interventions, especially for poor, disadvantaged and disabled children.
2. Universal access to, and completion of, primary education (or whatever higher level of education is considered as “basic”) by the year 2000.
3. Improvement in learning achievement such that an agreed percentage of an appropriate age cohort (e.g. 80% of 14 year olds) attains or surpasses a defined level of necessary learning achievement.
4. Reduction in the adult illiteracy rate (the appropriate age cohort to be determined in each country) to, say, one-half its 1990 level by the year 2000, with sufficient emphasis on female literacy to significantly reduce the current disparity between the male and female illiteracy rates.
5. Expansion of provision of basic education and training in other essential skills required by youth and adults, with programme effectiveness assessed in terms of behavioural changes and impacts on health, employment and productivity.

##### Dakar: 2000–2015

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children.
2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality.
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes.
4. Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults.
5. Eliminating gender disparities in primary and secondary education by 2015, with a focus on ensuring girls’ full and equal access to and achievement in basic education of good quality.

6. Increased acquisition by individuals and families of the knowledge, skills and values required for better living and sound and sustainable development, made available through all educational channels including the mass media, other forms of modern and traditional communication, and social action, with effectiveness assessed in terms of behavioural change.

6. Improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

Sources: WCEFA 2000a,b,c; EFA Forum 2000; UNESCO-EFA International Coordination <http://cms01.unesco.org/en/efa/>; Ten things you need to know about Education for All <http://cms01.unesco.org/en/efa/the-efa-movement/10-things-to-know-about-efa/>

EFA goals replicate the conventional education mentality and do not facilitate a holistic understanding of education and of learning throughout life. This is because, among reasons,

- *EFA goals are a list.* Each goal is treated and measured separately. The linkages between them are not apparent (eg, between child and adult education, school and out-of-school education, and so on). EFA's traditional and ongoing focus on Goal 2 – children's primary education – reflects and replicates the false historical "option" between child and adult education, and the neglect of early childhood care and education, despite well-known rhetoric on the subject. In fact, the EFA Development Index (EDI), created in 2003 to monitor EFA developments in countries, includes only four EFA goals, leaving out Goal 1 (early childhood care and education) and Goal 3 (youth/adult basic education).<sup>2</sup>
- *EFA goals are organised by age* – early childhood (Goal 1), school age (Goal 2), youth and adults (Goals 3 and 4), in the Dakar list – without articulation between them. Learners' segmentation according to age reflects the conventional education mentality that is behind the segmentation of education policies, goals and institutions. Focus on age contributes to losing sight of social learning organisations like the family and the community, and has institutionalised the false "option" between children's education and adult education, whereby children and adults have to compete for their right to education, especially in circumstances of multiple needs and scarce resources such as those that characterise countries in the South (Torres, 2003). EFA Goal 6 formulated in Jomtien in 1990, which referred to family education and public information ("Increased acquisition by individuals and families of the knowledge, skills and values required for better living and sound and sustainable develop-

ment...”) was eliminated in Dakar in 2000.

- *EFA goals adhere to the traditional **formal/non-formal** dichotomy*, leaving out *informal* learning, fundamental and expanding throughout the world given among others the expansion of life and of modern information and communication technologies (ICTs). The three-tier category (formal/non-formal/informal education) long used in the education field shows the centrality of formal education, with all other categories defined as *non-* or *in-*. In fact, the revised International Standard Classification of Education (ISCED 1997) does not include informal education, currently acknowledged as *informal learning* (incidental or random learning) given the absence of an organised education activity (Box 2).
- *EFA goals continue to view **literacy** in isolation*, as a separate area and goal, without acknowledging that literacy is a basic learning need of the population and thus part of *basic education*.
- *EFA goals adopt “**basic education**” as the main organising concept* – not lifelong learning. The Jomtien conference spoke of an “expanded vision of basic education”, an education aimed at “meeting the basic learning needs of the population”, in and out of the school system. However, the mission of education is not only *meeting basic* learning needs, but also *expanding them and generating* new learning needs along the process. (Torres, 2003).<sup>3</sup>

### From *education* to *learning* and from *lifelong education* to *lifelong learning*

The shift of focus from *education* to *learning*, and from *lifelong education* to *lifelong learning*, has been on the table at least since the 1970s.<sup>4</sup> However, and although *learning* has in fact become a much repeated word, with a multitude of labels,<sup>5</sup> disregard for effective *learning* continues as well the long-entrenched confusion between *education* and *learning*.<sup>6</sup> It is generally assumed that *learning* is always the result of some sort of teaching, and that teaching results automatically in learning.

The Fifth International Conference on Adult Education (CONFINTEA V), held in Hamburg in 1997, called for such transit, ending up with the *Hamburg Declaration on Adult Learning*. However, few understood and adopted such change of focus in the 12 years between CONFINTEA V and CONFINTEA VI (Belém, Brazil, December 2009). (Torres, 2009)

### *Lifelong learning and the right to education*

Lifelong learning is activated today as the key organising principle for education and training systems, and for the building of the “knowledge society”.

Lifelong learning acknowledges essentially two inter-related facts:

**Box 2****Education: Formal and non-formal**

**Education:** “Within the framework of ISCED, the term education is taken to comprise all deliberate and systematic activities designed to meet learning needs. This includes what in some countries is referred to as cultural activities or training. Whatever the name given to it, education is understood to involve organized and sustained communication designed to bring about learning. The key words in this formulation are to be understood as follows:

**COMMUNICATION:** a relationship between two or more persons involving the transfer of information (messages, ideas, knowledge, strategies, etc.). Communication may be verbal or non-verbal, direct/face-to-face or indirect/remote, and may involve a wide variety of channels and media.

**LEARNING:** any improvement in behaviour, information, knowledge, understanding, attitude, values or skills.

**ORGANIZED:** planned in a pattern or sequence with explicit or implicit aims. It involves a providing agency (person or persons or body) that sets up the learning environment and a method of teaching through which the communication is organized. The method is typically someone who is engaged in communicating or releasing knowledge and skills with a view to bringing about learning, but it can also be indirect/inanimate e.g. a piece of computer software, a film, or tape, etc.

**SUSTAINED:** intended to mean that the learning experience has the elements of duration and continuity. No minimum duration is stipulated, but appropriate minima will be stated in the operational manual.

**Formal education** (or initial education or regular school and university education): “Education provided in the system of schools, colleges, universities and other formal educational institutions that normally constitutes a continuous ‘ladder’ of full-time education for children and young people, generally beginning at age five to seven and continuing up to 20 or 25 years old. In some countries, the upper parts of this ‘ladder’ are constituted by organized programmes of joint part-time employment and part-time participation in the regular school and university system: such programmes have come to be known as the ‘dual system’ or equivalent terms in these countries.”

**Non-formal education:** “Any organized and sustained educational activities that do not correspond exactly to the above definition of formal education. Non-formal education may therefore take place both within and outside educational institutions, and cater to persons of all ages. Depending on country contexts, it may cover educational programmes to impart adult literacy, basic education for out-of-school children, life-skills, work-skills, and general culture. Non-formal education programmes do not necessarily follow the ‘ladder’ system, and may have differing duration”.

“Education, for the purposes of ISCED, excludes communication that is not designed to bring about learning. It also excludes various forms of learning that are not organized. Thus, while all education involves learning, many forms of learning are not regarded as education. For example, incidental or random learning which occurs as a by-product of another event, such as something that crystallizes during the course of a meeting, is excluded because it is not organized i.e. does not result from a planned intervention designed to bring about learning.”

*Source:* UNESCO, Standard Classification of Education (ISCED 1997)

- learning is *lifelong* (not confined to a particular period in life, “from the womb to the tomb”); and
- learning is *lifewide* (not confined to school but taking place everywhere: home, community, playground, workplace, sports yard, mass media, through play, conversation, debate, reading, writing, teaching, problem solving, social participation, social service, travel, use of ICTs, and so on).

On the other hand, one can relate the “emphasis on learning” to two different dimensions:

- ensuring that education (whether formal or non-formal) results in effective learning
- ensuring relevant learning opportunities beyond the school system

Thus, the **right to education** can no longer be understood as the right to access the school system (and eventually complete a certain number of years of schooling). The right to education implies essentially the **right to learn and to learn throughout life**. The state has an obligation to ensure equal learning opportunities for all, within and beyond the school system, at all ages.

Lifelong learning can be related to various concepts:

- Learning throughout life
- Learning to live
- Life is the curriculum
- Learning to learn
- Learning families
- Learning communities
- Learning societies.

Advances in neuroscience research are contributing to a better understanding of learning, and of learning throughout life, at various ages and stages. The belief that learning occurs and can occur at any age is confirmed by such research, thus providing scientific support to the claim that *school age* should not be confused with *learning age*. Now we know that the brain is mature between the mid-20s and the 30s, and that the mature brain can focus better and is capable of deeper and more complex learning. Also, the adult brain is capable of learning new tasks and being shaped by new experiences. Cognitive decline with age is avoidable if the brain is kept active, curious, in a permanent state of learning.<sup>7</sup>

### *What lifelong learning is not*

Lifelong learning is not only about *adults* – as many people and organisations continue to use it. Lifelong learning is not equivalent to adult educa-

tion or adult learning; it is *lifelong*, “from the womb to the tomb”, thus embracing children, youth and adults across the life span. Curiously, some countries in Latin American and the Caribbean that have adopted the lifelong learning terminology include it as an additional category or section within Ministries of Education or other ministries, as if it were separate from the rest (Torres, 2009). UNESCO itself has contributed to such confusions. The former UNESCO Institute for Education (UIE), based in Hamburg, traditionally devoted to adult education and responsible for organising the International Conference on Adult Education (CONFINTEA), was renamed UNESCO Institute for Lifelong Learning (UIL). EFA goal 3 – “Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes” – is the only one labelled “lifelong learning” in UNESCO’s documents and website.<sup>8</sup>

The lifelong learning paradigm has so far had little impact in countries in the South. Many countries, especially in Africa and Asia, are still struggling with access and the completion of children’s primary education and high adult illiteracy rates. Most of them struggle with quality issues at all levels of the education system. Generally, education continues to be associated with school education, and learning with school assessment. The picture of learning within and outside the school system is still distant and considered a luxury for many governments, social organisations and international agencies engaged with education in the South. International platforms such as EFA and the Millennium Development Goals (MDGs) contribute in fact to the reinforcement of such trends.<sup>9</sup>

There are also legitimate concerns *vis-à-vis* the lifelong learning paradigm as adopted and developed by countries in the North, mainly as a strategy for human resource development. Many fear that lifelong learning and its “focus on learning” may be a way to further neglect teaching and teachers, and to disengage governments from their commitment to ensure the right to education, by leaving learning in the hands of people, as their own individual responsibility. However, lifelong learning does not need to be reduced to an economic strategy; it does not imply abandoning teaching but rather strengthening it and acknowledging educators’ own learning needs; it does not have to be associated with individual learning, but as the possibility to combine social and personal learning in different contexts and moments; and it does not have to conflict with the right to education. On the contrary, the right to education expands beyond access and becomes the right to learn.

It is true that lifelong learning is an agenda proposed and adopted by countries in the North, whose contexts and perspectives differ considerably from those in the South. Thus there is the need to define lifelong learning from the perspective of the South, and of the diversity of situations and cultures characterising each region and country.



*Lifelong learning: Building learning families, learning communities and learning societies*

Adopting lifelong learning as a paradigm is not just about introducing minor adjustments to education structures, systems and policies. It implies a major revolution of traditional education and learning cultures:

- revisit the school-centred education culture that continues to view the school as the only education and learning system
- acknowledge and articulate the various learning systems, to ensure necessary coordination and synergy at both local and national level
- understand education/training, face-to-face/distance, formal/non-formal/informal as part of a continuum
- ensure effective learning within the school system, beyond tests measuring “school achievement”
- recognise previous knowledge and know-how as a key transectoral component of education and training policies
- rethink age as a central factor to organise education/training systems and opportunities
- abandon prejudices about age and learning, open up to new scientific evidence confirming that learning is an ageless endeavour
- accept literacy as a lifelong learning process rather than as a learning period
- go beyond the book as the single reading object that continues to define “reading habits”, and accept the wide variety that today characterises the reading world
- incorporate the screen as a new reading and writing device for all ages
- promote and support peer- and inter-generational learning at home, in school, at the community, at work, everywhere.
- envisage education and learning beyond classrooms and closed spaces, while ensuring outdoors learning, contact with nature, people, real-life situations
- combine all means and media available to make learning happen, through multimedia strategies
- acknowledge the importance not only of “modern” technologies but also of “traditional” ones massively available and still poorly utilised (radio, TV, blackboard, tape recorders, and others)
- take advantage of distance education/learning opportunities, through all available means, better if combined with face-to-face contact
- diversify policies and strategies to accommodate the specific needs and desires of specific communities, groups and individuals
- think education and learning not only in terms of isolated individuals who contribute to statistics, but also in social terms (groups, communities, networks, organisations)
- build learning families, with the help of specific policies and strategies

aimed at enhancing the cultural and educational capital of the family as a whole

- build learning communities, in urban and rural areas, so that all members – children, young people, adults – are engaged in learning activities, and all local resources are utilised, with community and local development in mind
- work towards a culture of collaboration that promotes collective access to, and use of, resources, rather than “each one have one” (each school a library, each student a computer, each person a cell phone, and so on).

The real challenge is building a learning society – families, communities and societies that learn – a goal far more complex, democratic and egalitarian than building an information society.

Effectively adopting lifelong learning as a paradigm implies a major shift for the EFA platform and for education and learning cultures in general.

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- 4 See: Faure 1973; Dave 1976; Delors *et. al.* 1996; Commission of the European Community 2000.
- 5 A few such denominations: distance learning, online learning, active learning, blended learning, distributed learning, synchronous learning, self-paced learning, self-directed learning, cooperative learning, collaborative learning, social learning, open learning, informal learning, lifelong learning, invisible learning, iLearning, fLearning, etc. See:  
<http://ticoteando.blogspot.com/2010/03/todo-tipo-de-aprendizajes-all-sorts-of.html>
- 6 Translation problems further reveal and exacerbate the lack of distinction between the two concepts. A few examples: a) the Delors report entitled “Learning, the Treasure within” (1996) was translated into Spanish as “La educación encierra un tesoro”; b) the “Hamburg Declaration on Adult Learning” (1997) was translated into Spanish as “Declaración de Hamburgo sobre la Educación de Adultos”; c) the 1st World Forum on Lifelong Learning organized by a LIFELONG LEARNING committee (Paris, October 2008) was translated into

- Spanish as *Foro Mundial para la Educación y la Formación a lo largo de la vida* and into French as *Forum Mondial pour l'Éducation et la Formation Tout au Long de la Vie* <http://www.3lworldforum.org/>
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  - \* UCL – Institute of Cognitive Neuroscience <http://www.icn.ucl.ac.uk/>
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# 4

## Revisiting the classics: The necessary return to research on the teaching- learning relationship in modern China

Ye Lan<sup>1</sup>

The teaching-learning relationship: an old topic, yet ever new

*Teaching-learning are a ubiquitous and important pair in society*

Society cannot continue and develop without teaching and learning in the broad sense. Historically, social development has primarily depended on the interactive transfer of human civilisation from one generation to the next, between groups and individuals, and so on. Through this transfer process, human knowledge, social development and intellectual energy are regenerated and renewed.

The life of each individual is accompanied by learning and teaching from the cradle to the grave, and the ubiquitous pair of “teaching” and “learning” in the process of individual growth. The central purposes of teaching and learning are the improvement of individual viability, satisfaction of development needs and enrichment of living experience.

*The teaching-learning relationship has taken on a special form after the emergence of school education*

School is a specialised educational institute that emerged with written language and the accumulation of knowledge in human society. Thus the teaching-learning relationship came to exist not only as part of the individual’s lifelong social experience, but also in the very specialised field of school education. It was with the emergence of school that people began conscious reflection and research on the teaching-learning relationship and highlighted it as an issue of concern. Contemporary understanding of the timeless teaching-learning relationship requires research in a field with an abundant history, and always raises new questions.

With the emergence of “teaching” and “learning” in the school setting, the teaching-learning relationship differentiated itself from social practice and individual living experience, and began to develop along the following

lines: limitation of the object of teaching and learning in school (e.g. by age and social status), theorisation of learning content (i.e. separation from social practice) and control of teaching over learning (i.e. the passiveness of the learning process). All these developments have contributed to a form of school education that, in its present form, cannot cater to the social demand on individuals or facilitate individual development. School education, as a closed system, has led to the neglect of the type of teaching and learning ubiquitous in people's lives, as well as diminishing the perceived value of and opportunities for attaining lifelong education and individual learning.

*A renewed understanding and re-establishment of the teaching-learning relationship – a new concept raised by the development of contemporary human society and the concept of lifelong learning*

The onset of modernity has caused problems in school education in China. People need to receive education throughout their lives in order to adapt to rapid social development and change. Furthermore, lifelong education and lifelong learning are not only essential to survival and development, but are also the inherent rights of each individual. In order to satisfy these needs and rights, access to diversified, optional and sufficient education and learning resources needs to be made available. This can be achieved through reform of the Chinese social education system, as well as the support systems for lifelong education and lifelong learning. Meanwhile, existing teaching-learning approaches at schools should also be reformed to provide education for people of different ages, including pre-school, school-age and adults. As such, the implementation of lifelong education and lifelong learning does not herald the abolition of school education. Instead, it entails the reform of school education and the teaching-learning relationship in existing school settings.

The concepts of lifelong learning and lifelong education can also be considered a return to the inseparable, non-contrasting, ubiquitous form of the relationship between teaching and learning. However, this return happens only when people's understanding of the teaching-learning relationship moves from unconsciousness to consciousness, from monotony to diversity and harmony. In order to conduct educational reform in a clear-minded and conscious way, we have to return to the starting-point and revisit the classics.

## Problems in research on the teaching-learning relationship in modern China

*In want of historical and indigenous perspectives*

Contemporary studies on the teaching-learning relationship in China focus first and foremost on how school education can meet the needs of contem-

porary social development, in particular the changes in educational and teaching concepts and the reforms of curriculum and teaching methods. Beyond these issues, the studies give further attention to the significance of lifelong education and lifelong learning. However, while the above two research perspectives make the needs of contemporary social development and the theories of international lifelong education and lifelong learning their anchoring-points, they tend to neglect the rich and profound ideas and discussions about the teaching-learning relationship in traditional Chinese culture and classical texts. These theories and practices of lifelong education and lifelong learning have been labeled “exotic,” while in fact studies on the modern development of Chinese traditions should be given more attention.

There is a lack of in-depth study of education in contemporary Chinese society and of realising lifelong education and lifelong learning at local level. We have simply settled for setting up targets and putting forward plans.

#### *In want of an awareness of integration and connection*

Lifelong education and lifelong learning are mainly understood as the enhancement of adult education, which has led to the objective of establishing two systems – lifelong education and national education. Since the lifelong education of all people is understood as adult education and social education, the reform of basic education and the reform of adult education are not well linked, and neither has adopted a lifelong education perspective in the real sense.

There is very little study of the fundamental and transformational connection between the reform of the existing education system and the establishment of a new system. As a result, there is a gap between deconstruction and reconstruction, which makes it difficult to establish a theory that is comprehensive, intensive and supportive for decision-making and practice.

#### *In want of a stand for individual development and personal growth*

Most studies on lifelong education and lifelong learning have been conducted along the lines of socio-economic development requirements, social development and knowledge renewal acceleration, and the requirements of international competition, and so on. They tend to focus on the necessity of research and practice, rather than on educational responsibility and support for the contemporary society from the perspective of personal growth and development. In particular, we are direly in need of studies on the bi-directional and integrated relationship between social and individual development.

We have not yet studied people’s needs for teaching and learning at different stages of life, the core issue of different tasks during different periods, as well as the connection and correlation between different periods,

from the perspective of individual growth and lifelong development. Without such study, we seriously lack in-depth understanding of the roles that lifelong education and lifelong learning play in the process of individual development.

We do not yet have a clear understanding of the difference between lifelong education and lifelong learning. First of all, they are undertaken by different subjects. The subject of lifelong learning is the individual, whereas the undertaker of lifelong education is society. To establish a learning society, we need not only to focus on the reform of the education system and its supportive systems, but also to make sure individuals' inherent willingness to learn is maintained throughout different stages of life and enhanced and improved in light of higher levels of development.

In view of this lack of relevant study in China, we herein propose the need to revisit the classic texts.

## Drawing inspiration by revisiting the classics

Traditional Chinese culture has a long history. Each historical period boasts its own classic works. Here we are going to use Confucius and *The Analects* in the pre-Qin classic texts as an example. Instead of attempting a comprehensive discussion, we are simply going to draw some inspiration. This choice of example is based not only on the fact that Confucianism is well known around the world and has exerted profound influence over Chinese history, ways of thinking and ways of life, but also on the fact that Confucianism emphasises the pursuit of individual value in society and the importance of teaching and learning. Confucius himself was also "classic" in both his discussions about teaching, learning and their relationship and in his personal integration of teaching and learning experiences. Traditional texts and figures shed light on how we should understand lifelong learning in a comprehensive way in our own age, and how we should make up for the lack of research in the pertinent fields.

*The pursuit of learning and development extends to the end of life and is of profound significance*

"At fifteen I set my heart upon learning. At thirty, I planted my feet firm upon the ground. At forty, I no longer suffered from perplexities. At fifty, I knew what the biddings of Heavens were. At sixty, I heard them with docile ear. At seventy, I could follow the dictates of my heart; for what I desired no longer overstepped the boundaries of right" (Confucius, 1999).

In these reflections Confucius portrays life as a constant process of pursuit



and development. The starting point of such a conscious pursuit is “to set one’s heart upon learning”. He emphasised that one’s realisation of the need for learning and setting goals play a key role in the transformation of life development from passive to active, and pointed out the approximate age at which this transformation occurred. At different stages of life a person benefits from his or her own learning and practice differently, but the highest achievable level is always to follow the dictates of one’s heart without the desire to overstep the boundaries of right. This is an expression of great wisdom, and also makes clear that the highest level of learning opens the door to freedom in the real world. This viewpoint is different from what we emphasise at present – that the purpose of lifelong learning is to impart the skill of being adaptable to quick career changes and to the needs of employment.

But is this a level of freedom something that only Confucius could achieve? Is this a goal that only ancient people some thousand years ago could pursue? The linkages and differences between the ancient and the contemporary are indeed thought-provoking subjects.

*The highest level of learning is “to hear the Way” and “to cultivate oneself”*

Confucius held that the most important aspect of “learning” is to “hear the Way”, i.e. to know the Way of the world outside one’s own existence and to follow it. He thus described his pursuit of the Way: “In the morning, hear the Way; in the evening, die content!” The aim of “hearing the Way” is to “cultivate oneself”. Confucius repeatedly stressed that one should “learn for one’s own sake”: “In old days men studied for the sake of self-improvement; nowadays men study in order to impress other people”, “The demands that a gentleman makes are upon himself; those that a small man makes are upon others.” Confucius advocated the lifelong pursuit of self-improvement and self-reliance through learning, therefore learning should not just seek gains without righteousness and speed without attainment. “If you hurry things, your personality will not come into play. If you let yourself be distracted by minor considerations, nothing important will ever get finished.” “He who will not worry about what is far off will soon find something worse than worry close at hand.”

In individual learning and talent education, Confucius placed emphasis on the fundamental, long-term objective, and made sober criticism of the danger of eagerness for quick success. His instructions still serve as a warning and inspiration for how we understand the planning of teaching and learning in lifelong learning and lifelong education.

*Developing a positive attitude and realising two conversions are key tasks for the learning process*

Learning for one’s own sake requires a positive attitude and can also develop

into a positive attitude. This positivity is the requirement Confucius set on his own learning, and was always present in his teaching attitude. "To learn and at due times to repeat what one has learnt, is that not after all a pleasure?" In learning, "to prefer it is better than only to know it. To delight in it is better than merely to prefer it" (Confucius, 1999). With such a positive attitude, learning can become an endless process of self-encouragement and self-motivation.

A positive attitude is also reflected in being ready to learn from all the people and of all things that are worth learning. Confucius firmly believed that "even when walking in a party of no more than three I can always be certain of learning from those I am with." "There will be good qualities that I can select for imitation and bad ones that will teach me what requires correction in myself." Similarly, he taught students that "in the presence of a good man, think all the time how you may learn to equal him. In the presence of a bad man, turn your gaze within!" Confucius's theory of active learning not only emphasises finding pleasure in learning, but also advocates the imitation of good qualities and inward examination. This extends far beyond contemporary aims of "acquiring knowledge and improving skills", to the perfection of personality as well as intellect.

As for the process of learning, Confucius was concerned with two important conversions, from outside to inside and vice versa. The conversion from outside to inside can be achieved by the ability to "not be ashamed to pick up knowledge even from one's inferiors." "When you know a thing, to recognise that you know it, and when you do not know a thing, to recognise that you do not know it. That is to know." Then, through deep "thinking" and "perception" to "hear one part in ten, and understand the whole ten", and then further, so that "when I allude to sayings of the past, you see what bearing they have on what was to come after". These are not the requirements of "exam-oriented education", but the requirements of "internalising knowledge". After the first conversion, one needs to enter the second conversion, that is, bringing one's knowledge to bear on one's behaviour. Efforts should be made to "practise" the Way of Goodness, whether in daily conduct or in the operation of government. Inevitably people make mistakes, but the most important is to amend them. "To have faults and to be making no effort to amend them is to have faults indeed!" Only after these two "conversions" are achieved can the Way of Goodness be kept in mind and shown in behaviour, and learning truly change and improve the individual and benefit others. These ideas, in my opinion, demonstrate an understanding of the true nature of learning and are still very much viable today. Things in the world can only be done well by the perfection of human beings. This eternal truth is often forgotten by those who see knowledge as tools.

*The way of being a teacher lies in taking delight in learning, correcting one's behaviour, being aware of the new, being good at understanding, guiding and teaching others*

Confucius has his own approach to teaching. With regard to the teaching-learning relationship, he believed that only insatiable learning can lead to tireless teaching: "he who by reanimating the Old can gain knowledge of the New is fit to be a teacher" (Confucius, 1999). Confucius, over 2,000 years ago, was aware that a teacher should first be a conscious lifelong learner.

Confucius's approach to teaching also stressed the importance of "correcting one's behaviour", in other words, teaching by example. This won him much respect and admiration. "Correct example" is a form of education that does not need to be taught, and is provided through "good behaviour". I think this is the inherent character of a teacher's dignity and strength. Now, although we often stress the ethics of the teaching profession, it does not seem to have reached such heights.

Confucius' students praised the way that "step by step the Master skillfully lures one on." Confucius used the personality of each person as the beginning of the natural learning sequence. The method of "skillfully luring one on" was founded on his ability to understand students. *The Analects* records many examples of Confucius giving different students different answers to the same question, which vividly illustrates how "teaching according to the student's ability" is integral to "being good at guiding others".

*Teaching and learning are a process in which teachers and students react with each other in mind, encourage each other, and seek the Way from each other*

Confucius did not think that students were necessary worse than the teacher. "Respect the young" is a reflection of such belief. Although he pointed out the many shortcomings of his students and sharply criticised them, he also often praised their abilities. We can find many examples of this practice in *The Analects*, which expresses praise, love and notes the help he received from students. In seeking "Goodness", Confucius marks no boundary between teacher and student: "when it comes to Goodness one need not avoid competing with one's teacher." A deep teacher-student affection permeates through the lines. This unique affection supported Confucius in his work of preaching his doctrine, imparting knowledge and resolving doubts. It was also this unique affection which guided the Way of relationship between teaching and learning. Confucius once said that "only one who bursts with eagerness do I instruct; only one who bubbles with excitement, do I enlighten. If I explain one case to a student and he is unable to make sense of similar cases, I do not continue the lesson." This idea is praised and is known as "heuristic" teaching. Although there are a few cases of heuristic teaching in today's teaching practice, they still remain

insignificant in relationship between teaching and learning.

To sum up, studies of lifelong learning and lifelong education must incorporate exploration of different theories of learning and education as well as the issues surrounding their lifelong implementation. China's current education system over-emphasises skills, practical interests and retaining knowledge and neglects spirit, humanity and the building of personality. Re-visiting the classics will not only impart wisdom, but may even present a good prescription for the ailments of contemporary teaching and learning.

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## Part II

### Policy developments in promoting lifelong learning

# 5 The development of an institutional framework of lifelong learning in China

Hao Keming<sup>1</sup>

China has now entered a new epoch of human resource development in the company of other countries. The emergence of the knowledge economy and rapid advances in science and technology, with information technology as a major component, have profoundly changed the path of economic and social progress, and greatly enhanced people's living standards. With the rapid advancement of science and technology and especially the impact of emerging new fields of science and technology, knowledge has been playing an increasingly important role in economic and social development. The capacity to learn, apply and create knowledge has become the decisive factor in promoting the advancement of human civilisation and in affecting the all-round development of an individual. It is widely recognised that building an effective lifelong learning system and a learning society has become the major strategic concern and common trend of educational reform in many countries. As the developing country with the largest population in the world, China has made significant achievements in this field, along with rapid improvements of the national economy and living standards.

## Progress has been made in the field of lifelong learning

*First, great achievements have been made in school education at all levels*

The key condition for building a learning society is to have learners with high zeal and personal initiative, as well as competences in self-directed study. Good school education is the indispensable foundation for learners to acquire real learning and the development of *bona fide* lifelong learning habits. The Chinese government has given top priority to universalising 9-year compulsory schooling. According to official statistics from the Ministry of Education for 2009, released in 2010, the net enrolment rate of

primary school-aged children reached 99.4%, and the gross enrolment rate of junior secondary schools reached 99.0%. Thus the goal of making 9-year compulsory education universal has been attained in China. Senior high school education and higher education also witnessed fast growth with the gross enrolment rate of senior high schools reaching 79.2%, and that of higher education institutions reaching 24.2% in 2009. The total enrolment in higher education reached 29,790,000 in 2009, indicating that China has now entered the stage of mass higher education. Guided by the concept of lifelong learning, school education has embarked on a new stage focusing on in-depth reforms, quality improvement and equity promotion.

*Second, continuing education has become an important part of China's educational undertakings*

The key value of lifelong learning theory for personal and educational development lies in the fact that the knowledge learned at school is only a small part of that needed for a person's lifelong career, which is acquired mainly through working experiences and constant learning. With rapid advances in science and technology, the mobility of people's occupations and positions has increased greatly, and it becomes imperative for everybody to constantly renew his or her knowledge and skills. The world is plagued by a number of thorny issues, such as the threat of global warming, the depletion of important resources, the danger of nuclear proliferation, and the current financial crisis with global impact, and so on. Under such circumstances, in a world full of uncertainties, for individuals to meet the challenges of uncertainties in the labour market, it has become all the more imperative for them to learn and enrich their knowledge and skills and improve constantly their own qualifications. The content of continuing education should include knowledge and skills related to an individual's current work and prospective aspirations. It should also satisfy his or her own personal interests, conducive to the realisation of his or her full potentials. There are at present 769 million gainfully-employed workers and farmers in China and about 120 million surplus labourers in rural areas who have to be gradually transferred to non-agricultural occupations in secondary and tertiary industries (Ministry of Labour and Social Security, 2009). Furthermore, there are millions of workers laid off indefinitely and workers reaching retirement soon, plus 144 million aged people (State Statistics Bureau, 2009). The total number of these large groups of people is close to one billion, three times the current school population. The educational needs of these different groups are highly diversified in terms of types of education or training to be provided, content of instruction, patterns of provision and duration of study. Thus, the challenges and tasks faced by China's continuing education are highly complex and difficult to accomplish.

During the past decades, all sectors of society, encompassing governmental agencies, educational institutions, communities, industrial and

commercial enterprises, have jointly exerted efforts to foster the healthy growth of continuing education in China, giving rise to various modes of continuing education and creating a lot of valuable experiences. The large number of diplomas or certificates awarded to those successfully completing the more formal continuing education programmes amply proves that the beneficiaries of these programmes have significantly improved their qualifications and skills. According to available statistics (Ministry of Education, 2009), the total number of people completing adult secondary education courses reached 18.77 million, while those completing adult higher education courses (mostly short-cycle ones) reached 2.3 million. The non-formal continuing education and training courses conducted in various sectors have helped millions of workers to upgrade their qualifications and skill levels. The number of farmers taking part in short-term training courses provided at secondary level exceeds an equivalent of 1.1 billion person-times. The number of participants benefiting from on-the-job training for industrial workers is around 90 million person-times annually. By the end of 2006, more than 60 million workers had received vocational certificates of various categories.

Continuing education usually provides short-cycle and job-related programmes, imparting new knowledge and skills, playing an irreplaceable role in human resource development. It has become an important avenue for improving workers' competences and for training professional and semi-professional manpower. In the recently-released draft of the National Guidelines for Medium- and Long-Term Education Reform and Development, the strategic position of continuing education is emphasised as one of the key components of the education system. Continuing education will surely become an increasingly important motive power for China's educational development.

*Third, the great advancement of modern distance education, based on fuller application of information technology, has provided more options and more convenient modes of study for ordinary people to conduct lifelong learning*

The rapid development of information and communication technology (ICT) has brought unprecedented opportunities to China as a newcomer to develop lifelong learning, taking full advantage of ICT. It provides a strong impetus to China to build an effective lifelong learning system and a thriving learning society with relatively scarce educational resources. In the past decades, educational platforms based on networks of modern communications, including services provided by satellites, internet, and radio and TV broadcasting stations, have been able to provide more options and more convenient modes of self-directed study for ordinary people to pursue lifelong learning. In the past 30 years, the Central Radio and TV University (2009), together with its local counterparts, have awarded bachelor's degrees



or associate-degree-level diplomas to nearly 7 million people. E-learning at all levels has also made rapid progress in China, with 1.1 million students registered at various e-learning colleges. The expansion of distance education has also contributed to the training of industrial workers, as well as the in-service training of other categories of professional workers.

*Fourth, community-based education and learning organisations have made big strides.*

Learning organisations and learning communities constitute the cornerstone of a learning society, playing an important role in creating a favourable environment for lifelong learning and a learning society. In recent years, great efforts have been made to promote the development of community education and learning organisations with commendable success. According to a survey of the Department of Vocational Education of the Ministry of Education (2009), by the end of 2007, 114 national experimental or pilot learning communities had been organised in 30 provinces, autonomous regions and municipalities under the direct jurisdiction of the Central Government. The number of pilot learning communities organised by provincial authorities exceeds 4,000. So far the volume of participation in the education or training courses provided by 65 pilot communities exceeds 2,561 person-times, accounting for 50.3% of the total in 2007.

While rapid progress has been made in building a lifelong learning system in China, there are still some aspects which are far from meeting the learning demands of both China's social development and national individual development: quality assurance of schooling, institution and mechanism of governance, policy of promoting participating rate, financial system, of continuing education, etc.

## The development of an institutional framework for lifelong learning in China

It is one of the major goals of China's education reform and development to build a lifelong-learning-for-all society. In order to achieve this goal, China is working on relevant policies and regulations so as to build up an institutional framework in the following areas.

*First, measures are taken to reform teaching content, methods and school regulations inspired by lifelong learning theory in the development of school education*

According to the Outline of National Medium- and Long-Term Plan of Education Reform and Development 2010–2020 (Ministry of Education, 2010), in the next 10 years, school education in China will develop further to provide better and equal opportunities for the Chinese people. For instance, by

the year 2020, the net enrolment rate of 3-year pre-school education will be raised from 50.9% in 2009 to 75%. The net enrolment rate of one-year pre-school education will be raised from 74% in 2009 to 95%. The maintenance rate of the nine-year compulsory education will be raised from 90.8% in 2009 to 95%. The net enrolment rate of high school will be raised from 79% in 2009 to 90%. The student number at higher education institutions will be raised from 29,790,000 in 2009 to 35,500,000. The gross enrolment rate of higher education will be raised from 24% in 2009 to 40%.

While efforts are made to advance school education, enhanced reforms will be made in teaching content and methods from the perspective of teaching and learning, especially prioritising developing individual learners' interest in learning and their ability of self-directed learning, so as to lay a solid foundation for learners' lifelong learning and self-improvement. A more open and flexible school education system will be developed to meet the diversified needs of learners. For instance, vocational education institutions at both secondary and tertiary levels are encouraged to provide programmes including both compensatory general education and vocational education for all members of society, especially unemployed or young people waiting for employment. High schools and higher education institutions will adopt more flexible schedules and relax age and other limits set for admission, enabling all potential learners to have easier access to training programmes. This kind of flexibility is very important for on-the-job training of workers. The function of higher education institutions in providing continuing education services will be strengthened. For instance, Peking University, a leading research university in China, has run a special school for farmers in recent years, besides providing continuing education for all types of professionals.

*Second, the development of an institutional framework is conducive to the healthy development of continuing education*

#### **(1) Reform of the administration and management of continuing education**

The development of continuing education involves different sectors of society and affects all members of society irrespective of occupation. In order to solve problems of resource wastefulness and low efficiency, resulting from lack of coordination between different governmental departments or industrial sectors, or irrational allocation of resources, or the construction of similar industrial plants in various localities, it is stipulated clearly in the National Guidelines that an inter-sectoral coordination agency for continuing education will be set up with the participation of all interested parties concerned, so as to achieve a better utilisation of educational resources. Meanwhile, the National Guidelines also require all governmental agencies in charge of various sectors and relevant national associations to include continuing education in their overall strategic development plans. Similar

requirements are imposed on local governments and national associations. With concerted efforts exerted by both urban and rural entities, a network will gradually take shape, based on learning organisations and learning communities, and thereby laying a solid institutional foundation for a learning society.

### **(2) Strengthening the motivation mechanism for continuing education**

In order to motivate the broad masses of workers to take part in continuing education, a policy of professional certificates to be renewed at regular intervals will be implemented, based on stricter observation of labour market regulations related to the award of professional certificates and qualifications. The new policy will take into account the results of workers' continuing education outcomes as an important reference point for professional certificate renewal, employment and promotion. Necessary supports will be offered by relevant enterprises or employers for workers' continuing education, such as paid leave for continuing education and arrangements to resolve conflicts between work and study.

### **(3) Reform of modes of providing continuing education**

Continuing education courses are usually short-term ones, being mostly job-related, well-adapted to impart new knowledge and skills. Continuing education, especially non-formal courses, differs radically from regular school education in course content, modes of delivery and avenues of teaching and learning. Its unique features include: 1) diversity of learners, 2) job-related studies with clearly-defined goals, 3) emphasis on mastery of practical competencies, 4) provision of convenient opportunities for study. Such courses try to meet the actual needs of staff and workers; the assessment of training outcomes stresses the acquisition of work-related competencies; and the schedule of teaching is usually flexible.

*Third, a national continuing education platform for the public will be built to provide high-quality education services, unrestricted by time and space for all members of society through successful application of information technology*

An open continuing education support system covering all urban and rural areas will be set up through an integrated application of information technology, including services provided by Internet and TV broadcasts. The Chinese government is planning to build an open university covering the whole country, based on the existing network of central and local TV universities. In my view, the conceived open university has to study and utilise successful experiences in distance education – both home and abroad – in the fields of subject and programme design, teaching methods and teaching administration. It must collaborate with relevant higher educational institutions home and abroad, choose the best educational resources

in the disciplines and fields selected, and use more active, flexible and convenient teaching modes based on its own advantages so as to build a new, high-quality and world-class open university. Considering the strong need for continuing education in China, I suggest that open universities should give equal priority to degree and non-degree education while exploring a system to articulate the two types of education.

The construction of a national digital or e-learning continuing education resource centre will be initiated and strengthened to provide a platform for educational institutions to share experiences and resources, as well as to conduct collaborations. This centre will greatly facilitate all learners to find the information and resources needed. It will keep a record of the scholastic achievements of learners and serve the purpose of monitoring the progress of their studies.

*Fourth, construction of overpasses (flyovers) to facilitate transfers between different types and levels of education*

Guided by lifelong learning theory and a people's-interests-first concept, overpasses will be erected as a policy measure to strengthen the national education system with explicit rules to articulate education of different types and levels, enabling learners to effect transfer to another institution of their choice. This measure is an effective incentive to motivate learners, and helps to develop a learning society.

**(1) The articulation between regular education and vocational education will be strengthened to broaden access to education for ordinary learners.**

Measures will be taken to provide Level 4 education between high school education, which is identified as Level 3 according to the International Standard Classification of Education (ISCED) set by UNESCO (1997), and higher education, which is identified as Level 5, with the purpose of providing post-secondary non-tertiary education and employment for high school graduates. ISCED Level 4 programmes typically last between six months and two years.

**(2) Improvement of educational evaluation, accreditation and transfer system**

China is exploring ways to set up a personal continuing education credit card system, recording an individual learner's credits or credit-hours of study earned legitimately, and the relevant information will serve as an important reference when making decisions on such matters as: 1) financial aid, 2) awarding of academic qualifications, 3) certifying the level of professional skills attained, 4) promotion of job or rank, 5) conferral of professional certificates, and 6) seeking entry into a specific educational institution at a higher level. A credit system in continuing education will be introduced and strengthened to promote credit transfer between different educational institutions, thus facilitating the evaluation, accreditation and recognition

of previous scholastic achievement of learners, a measure providing stronger motivation for learners.

**(3) Institution of a national qualification system allowing the articulation between diplomas and professional certificates, so that knowledge, competencies and skills are equally regarded by all potential learners and ordinary people at large**

Considering the complexity of this task, China will select some regions and educational institutions which meet the requirements for organising relevant pilot projects. Special support will be given to these regions and institutions to build overpasses articulating different types of education.

*Fifth, a financial support mechanism will be developed to meet the needs of lifelong learning for all*

A financial assurance system will be set up, based on cost-sharing mechanisms involving governmental agencies, enterprises and individuals. The allocation of budgetary or fiscal funds for education will be optimised at all levels. Incentives to encourage non-state/private investment in education will be provided to increase the financial input from these sectors, organisations and businesses. Priority will be given to various disadvantaged groups, especially to unemployed people, low-income wage earners, migrant workers, workers in underdeveloped areas, and disabled people for access to public continuing education resources.

Building a lifelong learning system and a learning society is a complex project, requiring steady advances step by step and a long and arduous process of development. The successful realisation of this project requires further exploratory and research effort, as well as the accumulation of experience, which call for international exchange and cooperation in earnest. This is the third international seminar on lifelong learning held at the same level in the first decade of the 21st century in China. These activities have greatly enhanced our understanding of lifelong learning, promoted experience exchange between various countries and boosted the development of continuing education and learning society in the world.

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# 6 The development of lifelong learning policy in the United States of America

Brenda Dann-Messier<sup>1</sup>

## Introduction

The United States supports lifelong learning and is committed to sharing best practices aimed at advancing an international priority for establishing lifelong learning systems.

The United States is committed to promoting the importance of adult learning, especially in relationship to broader public policy priorities. We view literacy as being connected to our economic and workforce goals and emphasise the importance of contextualised learning, the development of workplace competencies, and the integration of education and training for low-skilled adults, including immigrants.

We support the use of flexible post-secondary institutions, such as the US community college system, and in retraining programmes as part of a broader initiative to improve our domestic economy. These institutions serve a critical purpose in providing post-secondary education and job training that is responsive to local workforce demands and expands access to higher education. These formal lifelong learning systems help build ties with local businesses, prepare students for jobs in high-demand sectors, and ultimately help to close the enrolment and achievement gaps for under-represented students.

The US is systematically expanding its involvement with community colleges in an effort to expand international awareness of this unique asset of American higher education, to enable under-served students in key partner countries to acquire workplace skills that will equip them to participate more fully in the economic development of their own countries, and to support the development of international strategies at US community colleges that will serve American students to succeed in a global environment.

We believe that the use of technology-based learning, especially the development of open education resources as a means of delivering high-

quality instruction to immigrants and adults, is the way to the future.

This paper is intended to describe how our lifelong learning policy is developed. President Obama and US Education Secretary Duncan believe education policy cannot and must not be developed in a vacuum. It must be developed with broad consistent input. As President Obama stated in February of 2009:

“We will provide the support necessary for (every American) to complete college and meet a new goal: by 2020 America will once again have the highest proportion of college graduates in the world.”

All our work is focused on ensuring we meet the President’s goal.

## Workforce Investment Act (WIA)

The Workforce Investment Act of 1998, or WIA (112 STAT. 936, Public Law 105-220-AUG. 7, 1998), was initially authorised on 7 August 1998, replacing the Job Training Partnership Act of 1983. WIA was the result of years of recognition of the increasingly complex employment considerations of the 1990s, including “globalisation, advances in technology, demographic changes and subsequent economic restructuring” (United States Congress, 1998). Authorisation represented “bi-partisan” support between then-President Bill Clinton and a GOP-controlled Congress led by Speaker Newt Gingrich. WIA’s stated purpose: “The purpose of this subtitle is to provide workforce investment activities, through statewide and local workforce investment systems, that increase the employment, retention, and earnings of participants, and increase occupational skill attainment by participants, and as a result, improve the quality of the workforce, reduce welfare dependency, and enhance the productivity and competitiveness of the Nation” (United States Congress, 1998).

In 1998 the unemployment rate was 4.5%. The unemployment rate currently hovers around 10%. In 1998 our economy was strong. Now the global financial crisis calls for serious changes to the law to be made.

Every six to eight years laws are re-authorised if there is Congressional support. WIA has not been re-authorised since it was enacted, though Congress has attempted many times. The Obama Administration is hopeful that this will be the year because our economic situation is so different from 1998. Our hope is to modernise the legislation to reflect current economic realities and workforce needs, as well as to improve the effectiveness of the legislation.

WIA is comprised of five Titles:



### **Title I – Workforce Investment Systems (Administered primarily through the US Department of Labor)**

- State formula grant programs (Subtitle B)
  - Youth Activities
  - Adult Activities
  - Dislocated Worker Activities
- Job Corps (Subtitle C)
- National Grant Programs (Subtitle D)
  - Native Americans Program
  - Migrant and Seasonal Farmworker Program
  - Veterans Workforce Investment Program
  - Pilot and Demonstration Programs
  - YouthBuild Program

### **Title II – Adult Education and Family Literacy Act (Administered primarily through the US Department of Education)**

- State formula grant program (Subtitle A)

### **Title III – Workforce Investment-Related Activities**

- Wagner-Peyser Act (Subtitle A)
- Linkages With Other Programs (Subtitle B)
- Twenty-First Century Workforce Commission (Subtitle C)
- Application of Civil Rights and Labor-Management Laws to the Smithsonian Institution (Subtitle D)

### **Title IV – Rehabilitation Act Amendments of 1998**

### **Title V – General Provisions**

WIA was designed to encouraged local public/private partnerships to modernise workforce development services; focus on at-risk youth, under-educated and/or unemployed/underemployed adults, youth and adults with disabilities and English language learners (ELL); established statutory definitions, State and local workforce provisions, Job Corp, national programmes and administrative guidelines.

The Adult Education and Family Literacy Act (AEFLA) is the US Department of Education's major programme that supports and promotes services for adults who are educationally disadvantaged. Appropriations are administered by the Department through the Office of Vocational and Adult Education's (OVAE) Division of Adult Education and Literacy (DAEL).

The National Programs account provides funding for research, evaluation studies and demonstration programmes in the field of adult education and literacy.

The National Institute for Literacy (NIFL) is authorised to improve and

expand the system for the delivery of adult education and literacy services. NIFL is currently in the latter stages of being phased out, and its responsibilities will be absorbed by OVAE beginning in Financial Year 2010.

The programme of Basic Grants to States is the major source of Federal support for basic skills programmes. The purpose of the programme is to provide educational opportunities below the post-secondary level for adults over the age of 16 who are not currently enrolled in school; who lack a high school diploma; or who lack the basic skills to function effectively in the workplace and in their daily lives.

Instructional services are offered in three programme areas:

- Adult Basic Education (ABE) – basic skills instruction below the high school level
- Adult Secondary Education (ASE) – high school level instruction
- English Language Instruction (ELI) – English language instruction

## WIA community conversations

In anticipation of re-authorisation I designed and implemented a series of mechanisms to gather extensive feedback from key constituents, including:

- 20 focused listening sessions/community conversations across the country
- Meetings with more than 6,000 key stakeholders, representing over 870,000 adult learners, employers and business leaders, adult education and workforce development practitioners and administrators, policy-makers and elected officials, college presidents and staff, and NGOs and national organisations from all 50 states
- Received over 20 position papers by national organisations
- Solicited email feedback: [WIAConversations@ed.gov](mailto:WIAConversations@ed.gov)
- Utilised the National Institute for Family Literacy listserv, reaching out to over 9,000 practitioners
- Solicited blog comments on the Secretary's Ed.gov blog

## Key re-authorisation questions

Our efforts were guided by several key questions:

- What are the successful ingredients needed in a new WIA?
- What are some of the greatest challenges with the current law?
- What are some innovative solutions to these challenges?
- What are our hopes for the law?

We analysed all the data sources, read all the comments and came up with

12 broad themes. We confirmed them with the Adult Education State Directors, since our Federal funds go directly to the States – state departments of education, state departments of labour and community colleges. They affirmed these themes as the most important ones and we worked internally to narrow the themes to six broad areas for WIA re-authorisation.

At every listening session we included adult learners. Not surprisingly the student voices were most articulate and important. Every time I speak to adult educators I emphasise what the students are asking for from our lifelong learning system. Some of their “wishes” for re-authorisation included:

- Free classes; larger classrooms; more hours; and classes at different times of the day.
- Childcare and other support services
- Teachers who think and care about students.
- More teachers (better grouping of students) and more teacher time, in and out of the classroom.
- Grammar, social studies, science, and conversational English classes.
- New computers and computer instruction; textbooks and learning materials.
- Information on and help with going to college.
- Help in identifying a career, training opportunities and job services
- Immigrant professionals need services so they can work in their fields, such as credential review and transcript recovery services.

## WIA re-authorisation priorities

Within the US Department of Education we presented for approval our priorities to the Department’s policy committee, which is comprised of all senior education officials. Once approved, we developed our budget specifications.

Secretary Duncan encourages us to work with our key stakeholders to ensure a good understanding of the needs of our customers (students), providers and employers who will hire our students. All offices within the Department follow this process.

Overall, the feedback from our Community Conversations has enabled us to focus our re-authorisation priorities on six broad areas:

Our first priority is *to provide incentives that will spur innovation* in the delivery of adult education services, by creating an Incentive Fund in re-authorisation.

We were thrilled with the President’s inclusion in the budget of a \$30 million Workforce Innovation Fund devoted to adult education. This approach of providing real incentives to spur innovation is a hallmark of

the Obama administration and promises to stimulate reforms that will improve educational opportunities for our learners.

We are working with our partners in the Department of Labor to coordinate strategies that will leverage funds across agencies by issuing competitive grants that encourage State and local agencies to eliminate fragmentation and work together to build and share evidence of what works, as well as identify and validate effective strategies to improve programme delivery and outcomes for adult learners.

As our second re-authorisation priority, we want to make meaningful advances to ensure that our students have highly-effective instructors and to *professionalise the field of adult education*.

In order to meet the challenges in the field, we are proposing:

- Setting a minimum teacher requirement of bachelor's degree;
- Compensating teachers for planning time;
- Developing partnerships with universities to develop and strengthen teacher training programmes, specifically geared toward teaching literacy and basic skills to adults;
- Promoting professional development systems that recognise the increasing demands for innovation, and prepare teachers to develop skill-sets needed for innovative models, such as career pathways and strategies for accelerated learning, based on research and effective practice.

Third, WIA reauthorisation should strengthen the ties between adult education and post-secondary education, and between adult education and the public workforce system. It will *emphasise career pathway models* that connect adult education to post-secondary education and lead to the attainment of a recognised credential in high-growth sectors.

Fourth, we recognise that adult education has made incredible progress in the area of accountability under WIA. So, re-authorisation provides an opportunity to build on this work by *strengthening state to local accountability provisions* by requiring incentives and rewards, and by creating requirement for states to have operational longitudinal data systems connected to employment and post-secondary data.

Fifth, we want to *codify* the work over the last decade to prepare our non-citizen English learners for citizenship, and all English learners for more rich civic participation. The *English literacy/civics programme language* can make explicit the ability to serve immigrant professionals with targeted workforce services and clarify that English literacy programmes may include workforce training.

Our sixth and final re-authorisation priority allows us to demonstrate our *continued commitment to correctional education* as an important part of addressing the needs of our adult learners. By removing the current cap on available funding for correctional education and reinstating the 10% set-

aside, this increase in available funding will support efforts to ramp-up prisoner re-entry programmes that are proven to reduce recidivism, including services that begin in institutional settings and continue into community settings.

The use of technology spans all six of these priorities, and includes distance education to advance students' technological literacy, accelerate their learning and strengthen professional development for teachers, including making technology more accessible to individuals with disabilities.

Our proposal would increase the amount of funds States can spend on State leadership activities from 12.5% to 15%. With the new statewide changes we are asking States to take on, such as raising teacher quality, developing career pathway programmes, and developing content standards for adult education, it will be necessary to give States added flexibility to facilitate fiscal support for these new requirements.

Now, this is an ambitious agenda for re-authorisation – one on which we hope to work closely with our many partners, in order to make lasting improvements that will make a meaningful difference in the lives of our adult learners.

## Closing

Another step in the process is to work both within the Department with other key offices and across the federal government with other key agencies. Much of WIA funding is coordinated through the US Department of Labor.

We will continue to work closely with the White House, ensuring our priorities are aligned with the Administration's priorities. We also will continue to provide technical assistance to Congress – House and Senate staff – on our proposals for re-authorisation.

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- 1 Ms Brenda Dann-Messier is the Assistant Secretary for Vocational and Adult Education, United States Department of Education, Washington DC

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# 7 Better city, better life! Lifelong learning with Canadian characteristics

Roger Boshier<sup>1</sup>

## Master concept for educational reform

During the 1970s lifelong education was touted as a master concept for educational reform. But, because it demanded large-scale changes and challenged entrenched views concerning the alleged supremacy of learning in formal settings, its promise was never fulfilled. Nobody reformed education systems in the manner suggested by UNESCO. Instead, most nations selected congenial and rejected unwanted ideas from the master concept.

In Canada educational reform is complicated because there is no federal Ministry of Education. Education is a provincial responsibility so the Nova Scotia approach is not necessarily the same as the one in British Columbia, Quebec, Saskatchewan, Northwest Territories or anywhere else. But despite regional variations, there are enduring themes in Canadian notions of lifelong education and the learning society. In addition, Canadians have been prominent in international efforts to develop lifelong education theory and practice.

## True North, strong and free

Canada is a vast and variegated land. Significant factors shaping lifelong education concern:

- Immigrants
- Vast geography
- Resource extraction
- Being a middle power

### *Immigrants*

When immigrants arrive in Canada the first task is to find somewhere to sleep. The next is to learn how the new place works. Europeans reached the East Coast of Canada 500 years ago. Jacques Cartier sailed into the St. Lawrence in 1535 and Samuel de Champlain arrived in 1603. The first Europeans arrived on the west coast just over 200 years ago. George Vancouver, a bad tempered British sea captain, arrived a year after Jose Narvaez, a pilot in the Spanish navy.

When Vancouver met Galiano and Valdes in Georgia Strait in the summer of 1792 he was “mortified” to see them navigating with the chart Narvaez had made in 1791.

In the 1790s indigenous people lived in most parts of what is today British Columbia. It took a while for European settlers to arrive from the east and even longer to lay rails. But once westward expansion began it became a defining story of Canada. When poor Ukrainians and other Europeans arrived to carve a livelihood from cold prairie or damp forest, a durable educational theme was set. To this day, educators try to familiarise new arrivals with Canadian life, politics and culture. Learning is an integral part of citizenship – involving status, identity, civic virtues and agency (Schugurenksy, 2006). In addition, today’s immigrants scan the Internet looking for jobs, housing and resources to ease the task of settling into a new homeland.

### *Vast geography*

As an enormous land bounded by three oceans, severed by mountains, vast prairie and great lakes, Canada presents formidable problems for travel, life and learning. Most people live in a thin strip along the 49th parallel adjacent to the United States of America. Leaving metropolitan centres in the south the determined traveller eventually reaches tiny settlements, tundra and ice in the far north. Rural and urban life in Canada is dramatically bifurcated. Not much unites bustling Toronto or Montreal with the bleak stillness of Old Crow in the high arctic. In this respect, Canada is like China.

It is best not to trifle with Canada's rugged topography, and architects of the trans-continental railway were people of astonishing temerity. The idea of forcing a railway over the Rocky Mountains looked like the ravings of lunatics. Although it was still difficult to forge an east-west axis in Canada, rails were followed by one of the most sophisticated communications and broadcasting services in the world. Passenger railways are now in decline with fibre optics the replacement.

Experience with communications technology and experiments conducted by the Canadian Broadcasting Corporation, National Film Board and Canadian Association for Adult Education nicely positioned authorities to develop innovative systems of distance education. Even so, there are still debates about a digital divide and how to get technology into fjords, mountain valleys, islands and other remote places. The author lives on a small island

with no electricity and is familiar with the foibles of alternative energy, keeping boats running and search for feeble Internet signals (Boshier, 2009).

### *Resource extraction*

In most parts of Canada, settlement patterns, and hence learning and education, have been profoundly shaped by one-industry towns. The isolation of one-industry towns and need to inculcate skills related to logging, fishing, mining or tourism, have greatly shaped the character of learning and education.

When the one-industry collapses it can have devastating effects. In times past, special problems faced by one-industry towns attracted extension workers from Canada's most innovative universities. These days small settlements facing economic crisis often turn to learning as the way out. Hence, in British Columbia, Hazelton, Bamfield, Lillooet and other small places have re-branded themselves as learning villages (Faris, 2002).

### *Middle power*

A former Prime Minister characterized Canada's close proximity to the US as like living with an elephant – exciting but worrying when the neighbour rolls over. Ambivalence Canadians feel about the U.S. is rife with contradiction. Even so, the community college system in British Columbia models an American concept with only a tiny leavening of Canadian content. Every day and night huge amounts of U.S. culture pour across the longest undefended border in the world (between Canada and the USA).

Being a buffer between the USA and the old Soviet Union and eschewing an interest in armies or armaments, positioned Canada to be a middle power. Although there is now widespread questioning of peacekeeping (and most military commanders are against it), at one time disdain for militarism reinforced Canada's reputation for even-handedness in international relations. Being a middle power also plays out in personal relationships where Canadians place a high priority on inclusion, decency, civility and celebration of difference. There is no "essential" Canadian so newcomers are welcome and urged to maintain links with their homeland.

From the 1920s onwards, Roman Catholic priests in Atlantic Canada orchestrated the Antigonish movement which placed a high priority on kitchen study clubs, cooperatives and other methodologies of out-of-school learning for farmers, miners and fishermen (Alexander, 1997; Lotz and Welton, 1997; Welton, 2001). The University of British Columbia Department of Extension urged the 1959 Royal Commission to embrace principles of lifelong education. Roby Kidd chaired and John Friesen was at the 1960 Second UNESCO World Conference on Adult Education (held in Montreal). At about the same time Thomas (1961) carefully laid out the contours of a learning society.

Allen Tough (1971) did his doctoral dissertation on learning in informal



settings. After 1972, the International Council for Adult Education was headquartered in Toronto at first under the leadership of Roby Kidd and later Budd Hall. At the Ontario Institute for Studies in Education (OISE) Alan Thomas (1991) had a long-standing interest in lifelong learning – a theme of his book *Beyond Education*.

## Landscape and meaning in BC

Vancouver is nestled between mountains and sea at the mouth of the mighty Fraser, one of the world's preeminent salmon-spawning rivers. First nations (or indigenous) people lived in the Vancouver area long before Europeans arrived. Stimulated by a gold rush, the City of Vancouver was settled in the 1860s and by 1887 there were 5000 residents.

Because of regional differences, it is a struggle to build a unified Canadian nation from sea to sea to sea. Just like in China, independence movements challenge federal authorities and there are complaints about how Ottawa distributes resources to regions.

Because of immigration and settlement patterns, there are strong links between Vancouver, the Pearl River delta, Shanghai, Taiwan and Hong Kong. Road, port, bridge-building and other infrastructure developments are billed as “gateway to Asia” projects. There are numerous Asian arts activities in Vancouver and, every June 4th, demonstrators remind Chinese officials of the need for truth, reconciliation and human rights. There is an active Institute of Asian Research and an impressive library of Chinese-language materials at the University of British Columbia.

Apart from Chinese people brought in to labour on mines and railways, the first immigrants to Vancouver were mostly from Europe. This changed after the 1960s when governments again turned to Asia for immigrants (Li, 2008). Today, the Vancouver skyline sprouts postmodern flourishes like those in Shanghai (Delany, 1994). Repaying the favour, when Shanghai wanted a design for the Nanpu Bridge to link Puxi to Pudong, they copied the Alex Fraser (Anacis) bridge in Vancouver. Although the original Vancouver Chinatown remains, Chinese cuisine and community life has spread throughout the region. In Richmond (to the south of Vancouver city) more people speak Chinese than English.

Vancouver has increasingly become an Asian city. But the context for lifelong education in Canada is unlike China in significant ways (see Table 1).

Almost 30 per cent of Canadian adults participate in organised forms of adult education (OECD, 2002) and most young people in Vancouver go to post-secondary education after high school.

There are public research-intensive universities, specialised private universities, community colleges and institutes. But what most distinguishes

**Table 1. Factors shaping lifelong education in Canada and China**

	Canada	China
<i>Ethnocultural orientation</i>	Diverse and multicultural	Mostly monocultural
<i>Geography</i>	Large and open	Large and crowded
<i>Origin of population</i>	Immigration	Locally-born
<i>Governance</i>	Multiparty democracy	One-party state
<i>Moral anchors</i>	Humanism	Socialism, Chinese characteristics
<i>Main imperative</i>	Human happiness	Modernization
<i>Teacher-learner relations</i>	Learner-centred	Teacher-centred
<i>Motivation for learning</i>	Learning for its own sake	Avoidance of pain and shame
<i>Agencies fostering learning</i>	Non-governmental	Governmental
<i>Role of the learner</i>	Active	Passive

learning in Vancouver is the large number of nongovernmental organisations (NGOs) concerned with human rights (e.g. Amnesty International, Oxfam, Médecins sans Frontières), the environment (e.g. Greenpeace; the Sierra Club; Western Wilderness Committee), the arts (e.g. Vancouver Opera Society; Arts Club Theatre), interest groups (e.g. the World Ship Society; Mustang Car Owners Club), occupational groups (e.g. Society of Engineers, Registered Nurses Association of B.C., B.C. Teachers Federation) or lobbyists (e.g. Literacy B.C.). One of the most active NGOs is SUCCESS (United Chinese Community Enrichment Services Society). Tien Ching operates an NGO helping girls from Gansu villages get into Chinese universities ([www.egrc.ca](http://www.egrc.ca)).

Vancouver nurtures artists, writers, musicians and many educational and cultural workers. The world's leading environment activist organisation (Greenpeace) was founded and musicians such as Bryan Adams and Sarah McLachlan live there. There is a lively poetry and performing arts scene, a Vancouver Symphony Orchestra, opera company and innovative art gallery. The Vancouver International Film Festival, Amnesty International Film Festival and DOXA Film Festival attract large and enthusiastic audiences. Vancouver hosted Expo '86 and, in 2010, the Olympic Games. Radical Entertainment, one of the world's largest computer game companies, is in Vancouver. Writer William Gibson, who coined the term cyberspace, and Douglas Coupland who labeled Generation-X, live and work there.

Vancouver abuts forest and mountains and wild animals (such as bears or cougars) sometimes wander into the city. Eagles soar and citizens love dolphins and whales. The sockeye salmon is a Vancouver icon and, at one time,

sustained a flourishing coastal fishery.

British Columbia started out as wilderness, and those deciding to live there are not ordinary people. Immigrants are often relentless adventurers and not a cross section of their countries of origin. British Columbians live where fault lines converge. Politics are widely regarded as a forum for eccentrics. British Columbia is the beginning and end of the road for many. But it has long been a favoured destination for immigrants from China who want to live in an Asia-friendly environment built on democratic commitments to multiculturalism and inclusion.

At first, education and learning in British Columbia was impelled by a bourgeois desire for a smattering of high culture to offset the brutishness of life in the woods. After indigenous people, the context for lifelong education was created by people named Fraser, McKenzie, Kyle, Weir, Patullo or Helmecken. These days the salient stories of British Columbia are increasingly written by people with names like Dhaliwal, Lee, Li, Lam and Wong.

## Architecture of lifelong education

In OECD countries there has been a regrettable tendency to ditch adult education in favour of lifelong learning. These are often regarded as overlapping concepts but, as noted by Nesbit, lifelong learning can be limiting. In general, lifelong learning “is individually focussed, acontextual and adopted a little too readily by those who believe education entails adherence to, rather than challenge of, social orthodoxies” (2006, p. 16).

### *Lifelong learning and lifelong education*

There is widespread confusion as to what distinguishes lifelong learning from lifelong education and many people use these terms as synonyms. But there is an important difference.

### *Lifelong education*

Education is a systematic process and provided service. Lifelong education requires someone – often government or other agencies – to develop policy and devote resources to fostering interaction between a broad array of informal, non-formal and formal settings for learning. Deliberate choices must be made. Lifelong education is a noun – the name of a master concept for educational reform.

### *Lifelong learning*

Lifelong learning is a signifier for adapting to the “needs” of the global economy. Information technology and globalisation, coupled with the anarchist-utopian notion that formal education reinforces unequal power relationships, triggered the shift from education to learning. This is a source

of concern because “the concept of learning floats free from designated and concrete meanings .... (and) .... unless civil societarian adult educators claim ‘learning’ for themselves, giving it a socially anchored, contextual meaning, neo-conservatives will run away with it” (Welton, 1997, p. 33).

Lifelong learning is a verb denoting a less emancipatory set of relationships than lifelong education. Lifelong learning tends to render invisible any obligation to address social conditions. Predatory capitalism is unproblematised.

Lifelong learning is mostly nested in an ideology of vocationalism. Learning is for acquiring skills enabling the learner to work harder, faster and smarter and help their employer and nation compete in the global economy.

Lifelong learning is nested in a notion of the autonomous free-floating individual learner as consumer and mostly abdicates responsibility for the public good. It avoids hard choices by putting learning on the open market. If the learner – as consumer – does not choose to take advantage of available opportunities it is their fault. It is easier to blame the victim than overcome structural or psychocultural barriers to participation. The savvy consumer surfs the Internet to select from a smorgasbord of offerings. Learning is an individual activity. Hence, lifelong learning is favoured by advocates of an information economy, many prone to make vast and often ludicrous generalisations about technology-mediated forms of learning.

### *Learning settings*

Lifelong education greatly depends on fostering interaction between formal and non-formal settings for learning. Non-formal and formal are more systematically organised than informal settings.

**Formal settings:** Formal settings for learning include schools, colleges and universities. Learners in formal settings are usually differentiated according to age and control is vested in Ministries of Education or comparable agencies. They are organised in a systematic fashion and learning in formal settings usually involves a sequence of activities.

**Non-formal settings:** These are out-of-school settings for learning. The teaching and learning process in non-formal settings is sometimes quite orthodox and formal. Hence, the label “non-formal” refers to the setting, not activities occurring therein.

There are many more non-formal (out-of-school) settings for learning than there are schools, colleges and universities. Examples of non-formal settings for learning include community centres, workplaces, government departments, the military, churches, farms and factories. They are organised in a systematic fashion and learning in non-formal settings usually involves a sequence of activities.

**Informal settings:** Learners acquire huge amounts of knowledge, attitudes and skills from the everyday settings of daily life. Most people get up in the morning and, if fortunate, have access to numerous sources of knowledge.

Informal settings include homes, workplaces and public spaces where people learn in casual, serendipitous or intentional ways. Television, newspapers and the internet help foster learning in informal settings. Because of its unsystematic nature, learning in informal settings does not constitute education.

The Internet has spurred interest in intentional learning in informal settings (Livingstone, 2007). The campaign is an important way to foster learning in informal settings (Kidd and Hall, 1989) although, as demonstrated in the 2009 Canadian effort to combat the H1N1 influenza virus, can be a costly and embarrassing shambles (“Ottawa’s mass immunization program failed”, *Globe and Mail*, 3 June, 2010, p. A1). In China, learning in informal settings is impeded by “campaign fatigue.” Citizens have endured too many (often ludicrous) campaigns.

All education (in formal and non-formal settings) hopefully involves learning. But not all learning involves education. Researchers know most about learning in formal and non-formal and least about informal settings. With the exception of studies like Tough’s (1971) work on learning projects and Livingstone’s (2007) not much is known about how people learn in informal settings. This is an area needing new research initiatives.

In Figure 1 the size of each circle is an approximation of the amount learned in each setting. Citizens learn most things in informal settings, a



**Figure 1** Interrelationship between learning settings – informal, non-formal and formal

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lesser amount in non-formal and even smaller quantity in formal settings.

Not much is known about how learning in one setting relates to learning in another. But, after studies conducted at the University of Toronto, Livingstone (2007) claimed:

- Canadian adults use informal settings to learn things related to their paid employment, housework, community or volunteer work and general interests.
- Work-related learning in informal settings is more extensive than participation in adult education courses and programs;
- The general incidence of learning in informal settings may have increased over the past quarter century. Canadian adults spend an average of about 15 hours per week learning in informal settings.
- There is no relationship between learning in informal settings and either formal schooling or participation in adult education courses. Those with little formal schooling or adult education course participation are as likely to devote time to learning in informal settings as are well-schooled Canadians.

### *Terminological confusion*

Nearly 40 years after Faure (1972) key concepts are still clouded by ambiguity, idiosyncratic usage and the renaissance of what is often called “non-formal education” (Rogers, 2004). Leading writers in this field variously use “formality” to variously refer to systems, ways of learning and pedagogy. Hence, there is frequent reference to:

- “Non-formal adult education” (as a system)
- “Formal or non-formal learning” (a way of learning)
- “Non-formal education activities” (pedagogy used in non-formal settings).

In many places, learning is conflated with education. What used to be called distance education is, for no good reason, now often referred to as distance learning. In some parts of the world non-formal is regarded as a synonym for adult education. But, in the context of the learning society touting non-formal settings as a system of “education” has led to balkanisation and exacerbated the inability of politicians to envisage lifelong education in a holistic and systemic manner.

It is better to construct the informal, non-formal and formal as learning *settings*. In an ideal learning society, built on principles of lifelong education, it would be possible for learners of all ages to effortlessly opt in and out of different learning settings throughout life inside the broader tapestry of an open, fluid, dynamic and democratic learning society.

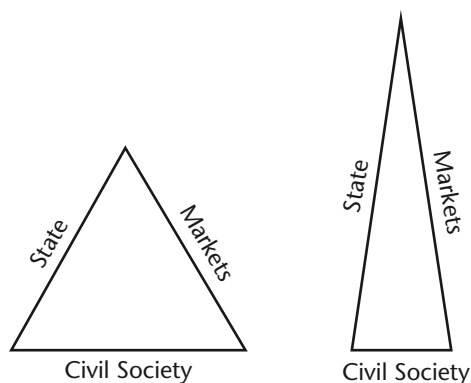
## State, market and civil society

Lifelong education has been shaped by the competing interests of civil society, the state and markets (Figure 2). In Canada, early notions of lifelong education were motivated by the need to welcome immigrants and ensure they had knowledge needed to join efforts to build a better world. These days, civil-society imperatives have been overwhelmed by marketisation and, in places, a state desire to maintain social harmony, legitimacy and power. In addition, educators are today challenged by techno-zealotry (see Daniel, 1996) and individualised “free” market notions of lifelong learning and the learning society.

In Figure 2 the length of the line on each side of the triangle shows the extent to which each variable shapes the character of lifelong education and the learning society. In the 1970s (post-Faure) civil society, the state and markets had a more-or-less equal influence on lifelong education.

This relationship dramatically changed in the late 1970s when Margaret Thatcher came to power and neoliberalism became a worldwide movement. By 2010, civil society elements in lifelong education had withered while state and market preoccupations had greatly expanded. In 21st century Canada, as in other OECD countries, state needs and market imperatives exert a strong influence on lifelong education theory and practice.

The events of 11 September 2001 created a culture of fear, eroded human rights and weakened civil society organisations. The 2008 global economic meltdown had a less devastating effect on Canada than other places. Even so, it was traumatic and, in educational reform circles, further weakened the civil society imperative in lifelong education.



**Figure 2** Variables shaping lifelong education in Canada

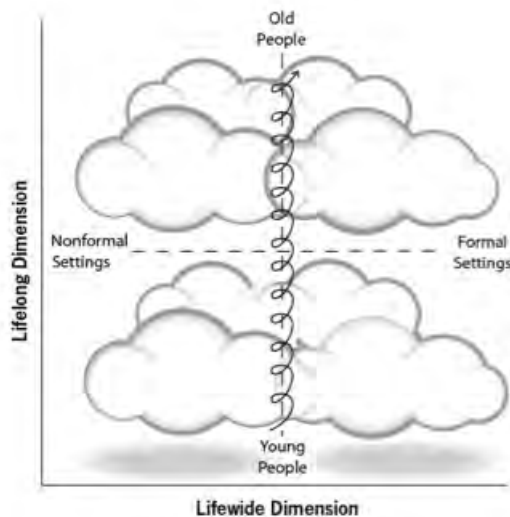
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The relative absence of a civil society emphasis in 21st century renderings of lifelong learning caused Mojab (2006) to label this triangular configuration a “militarized empire of state and market” and wondered why so many people still follow its dictates – “to acquire skills, to get jobs, to have income, to consume and live as consumers/clients” (p. 353). In Canada, as in other places, citizens struggle to juggle state imperatives with market pressures. By 2010, Canadians were joining fewer clubs and going to a smaller number of meetings than 30 or 40 years ago. Low voter turnout during elections, political apathy, cynicism concerning politics and politicians, and numerous other signs pointed to the decline of civil society as a fundamental pillar of a democratic state.

### *UNESCO’S Faure Report*

The French student movements of 1968, the critique of formal education mounted by anarchist-utopians like Ivan Illich, Everett Reimer, Paulo Freire, Paul Lengrand, Majid Rahnema, Alan Thomas, Roby Kidd, John Holt and Paul Goodman, the needs of newly independent countries along with promise nested in new technology, gave educational reform efforts added impetus.

In *Learning to Be* (Faure, 1972) lifelong education was proposed as a master concept for reform of entire education systems. A proper application of lifelong education would result in the creation of a learning society where



**Figure 3** Vertical and horizontal dimensions of the learning society



participation in education would be taken-for-granted – an inalienable human right like clean water or a roof over one's head.

Figure 3 is our portrayal of what the Faure commissioners talked about. The vertical is the *lifelong* and horizontal the *lifewide* dimension of the learning city, district or society. Ideally, citizens of all ages would get opportunities to learn in a broad array of settings. As indicated by the spiral in Figure 3, within a learning city or district, citizens of all ages would effortlessly opt in and out of formal and non-formal settings as their circumstances change.

Too many educational authorities favour formal and put insufficient resources into non-formal settings. As suggested by Figure 1, in a learning society there would be a more-or-less equal distribution of resources among zones shown in Figure 3.

There should be high levels of interaction between non-formal and formal settings and less of a tendency to segment learners according to their age. Borders in Figure 3 should be porous and dynamic and are thus shown as clouds migrating across boundaries.

Although there is a need for vertical and horizontal integration and democratisation within a learning society, formidable structural and psychocultural barriers impede the possibility of people opting in and out of opportunities for learning throughout life. Structural constraints are bad enough but, even more worrying, are self-defeating audiotapes going off in the heads of disadvantaged citizens contemplating the need to learn something new – saying things like “I am too old to learn anything new,” “Our family works the land, we do not go to school,” “I am a computer luddite,” “In this place girls stay home,” “I did not like school so why go back now?” With respect to the horizontal – the lifewide – dimension, massive barriers impede interaction between formal and non-formal settings.

Knowing intergovernmental reports are often ignored or misinterpreted, UNESCO tasked its Hamburg-based Institute of Education to help member nations implement recommendations of *Learning to Be* and, after 1972, published numerous books on lifelong education (e.g. Dave, 1976). The Canadian Commission for UNESCO circulated Faure Report recommendations and called for action. There were similar initiatives in New Zealand and other UNESCO member countries.

For many years after 1972, the author broke university graduate students into groups and had them work on recommendations from *Learning to Be*. After Faure, Canadians experimented with distance education, created learning exchanges, offered credit for experience, created classroom spaces for adults, introduced prior learning assessment and tried to dismantle barriers impeding the ability of people to opt in and out of learning settings throughout life. Following Faure, several Canadian provinces conducted their own enquiries into lifelong education and the learning society. But excitement generated by *Learning to Be* was short-lived.

### *Thatcherism, Reaganism and Mulroneyism*

By the late 1970s utopia nested in the Faure Report was deflated by the radicalism of right-wing programmes launched by UK Prime Minister Margaret Thatcher and emulated elsewhere. Thatcher was Prime Minister of Britain from May 1979 until November 1990 and stood for Victorian values, a mean-spirited individualism, the degovernmentalisation (and thus erosion) of government, free markets, privatisation and, if possible, end of labour movements. Her influence was comparable to Reaganomics in the United States, Rogernomics in New Zealand, economic rationalism in Australia and Mulroneyism in Canada.

A worldwide neoliberal movement drew sustenance from Chicago economist Milton Friedman (1962). Stimulated by Thatcherism, rightwing radicalism eroded the civil society emphasis of the Faure Report. Neoliberalism produced new assumptions to buttress lifelong learning:

- Education is a private good. Consumers who want it should pay.
- Competition is inherently good. It nurtures efficiency.
- Learning is primarily an individual endeavour. In the new technologically-mediated learning society, individuals will choose from the free market.
- In a free-market society, there are winners and losers. It is a “natural” process, a matter of “choice.”

Neoliberalism meant democratic notions of lifelong education were increasingly replaced by individualised renderings of lifelong learning. Lifelong learning discourse was elaborated with the same bombast as in other parts of the Friedmanite agenda. There would be a cult of efficiency, a level playing field and competition pitting state-funded agencies against each other and private training providers. Universities would launch a contest to become world class. Academics who earlier promoted lifelong education hailed the imminent arrival of a knowledge economy and society.

In government circles there was a sustained and uncritical celebration of Friedman's (1962) ideas about human nature and greed – which continues to this day. For the free-market Chicago economist, the bottom line was always individual self-interest and shareholder profit. That the institution or company might also think about its workers, community, society or planet was dismissed as quaint rubbish – a relic of welfare-state muddle.

### *1990 onwards*

The title of the Faure Report was always a problem. *Learning to Be* sounded like California psychobabble. Or an exhortation from the inner sanctums of individual psychology. What did “being” or “learning to be” have to do with learning about computers, getting a job, making money or preparing for the global economy?

In 1987 Roger Boshier did a one-hour television interview with Majid Rahnema, a co-author of the Faure (1972) Report. Rahnema explained the process of travelling with Edgar Faure to secure submissions to the Commission, the key concepts in their work, factional disputes emerging during the write-up process, the difficult process of translating the French title into English and continuing worries about the notion of *Learning to be* (Boshier, 1987).

In 1990 discourse around lifelong learning was changed by Senge's (1990) work on learning organisations. Although Senge's work was flawed (Fenwick, 1998) it reinforced enthusiasm for learning organisations, villages, towns, districts or cities. What Senge proposed looked more manageable than Faure's master concept for large-scale systemic reform. It was easier to build a learning organisation or learning village than reform an entire system of education.

In 1994 UNESCO touted "Lifelong learning for all" as a guiding strategy. In 1966 the OECD urged members to make lifelong learning a "reality" for citizens and, in Europe, 1996 was the "Year of lifelong learning." With economic rationalism eroding the earlier focus on civil society, UNESCO had commissioned the Delors (1996) Report which, after a 3-year investigation, broadened lifelong education discourse by highlighting four pillars of an optimal learning society. For Delors, a learning society would involve:

- Learning to live together
- Learning to know
- Learning to do
- Learning to be

Having "learning to do" as a pillar of a learning society was a concession to people who saw lifelong learning as a signifier for globalisation, workplace learning and hyper-competitiveness. Along with "being" a good citizen, in many places "learning to do" useful things was a matter of survival. For example, in a Canadian winter, on rural roads, not knowing how to dig a car out of a snowbank can be fatal.

The Delors (1996) Report found a receptive audience in Canada, in particular, "learning to live together" nicely fitted Ralston Saul's (1998) notion of Canada as a Siamese twin – a triumph of imagination and model of harmony between French and English, north and south, rural and urban, east and west.

In 2005, Roger Boshier and Hans Schuetze organised a conference of the Comparative and International Education Society (in Vancouver) around the notion of learning to live together. Inclusive multiculturalism enjoys broad political support and learning to live together is an area where other nations (such as China) could learn from Canada. Even so, there were few signs Ottawa was informed by the four pillars as elaborated by Delors (1996).

Instead, federal authorities were working on an “innovation strategy.”

At the dawn of the 21st century, Ottawa renderings of lifelong learning were mostly for skill development. Two federal reports – *Knowledge matters: skills and learning for Canadians* (Human Resources and Skills Development Canada, 2002a) and *Achieving excellence: investing in people, knowledge and opportunity* (Human Resources and Skills Development Canada, 2002b) – insisted learning is for economic growth and competitiveness. Social matters less than human capital. It is the duty of the citizen to embrace lifelong learning because awesome consequences could flow from Canada falling behind in the global economy. Lifelong education was now infused with a culture of compulsion and fear. It was the patriotic duty of every citizen to go out and learn something. Canada’s position in the global economy depended upon it.

Given the tenor of federal reports, observers were not surprised when the 2003 version of the federal *Adult Education and Training* survey contained questions on learning for work but only one on learning for a “personal interest” (Statistics Canada, 2003). Considerable effort had gone into including non job-related learning in earlier surveys. By 2003, Ottawa cared more about workers than citizens. There was no mention of Faure or Delors. Like a Newfoundland iceberg, utopian ideas about building a social democratic learning society had split apart and drifted away.

## Bifurcated discourse

There is much to applaud in the 21st century fascination with learning villages, districts, towns and cities. Even so, newer are not necessarily better than older concepts and here at the dawn of the 21st century it would be a mistake to dismiss Faure (1972) or Delors (1996) as relics of earlier eras.

In Canada, two “lifelong” discourses now compete for attention, resources and as templates for educational reform.

- **Lifelong education:** Older (i.e. Faure or Delors) notions of lifelong education still enjoy the endorsement of university academics, political activists and citizens worried by the weakening of civil society and pervasive influence of business attitudes, language and practices in Canada. Those endorsing older notions of lifelong education consider learning throughout life a fundamental attribute of citizenship and a necessary corollary of active participation in a democratic society. Their language contains words like “participation,” “inclusion,” “consultation” and “working together.” Social is as important as human capital.

This discourse is primarily shaped by citizenship and the need to build civil society. At the centre are preoccupations with citizen-participation, inclusion, consultation, consensus and social justice. Advocates of this

discourse are committed to social-democratic notions of lifelong education, prefer localisation to globalisation and reject the TINA (“there-is-no-alternative”) principle. There are many alternatives to neoliberalism with its uncritical celebration of skills, competencies and training.

The *leitmotif* of this discourse are people enjoying a participatory learning festival. Advocates of this discourse have profound doubts about the so-called “knowledge economy.”

- **Lifelong learning:** Newer (i.e. OECD) notions of lifelong learning enjoy the support of Canadian federal and provincial governments, corporations and business interests who consider learning a key factor shaping Canada’s ability to compete in the global economy. Those endorsing this view primarily see learning as a matter of individual choice and exaggerate the role and “efficiency” of technology. Their language contains words like “mega,” “best practices,” “competencies”, “skills”, and “evidence-based” “outcomes.” Social is less important than human capital.

This discourse is primarily shaped by markets and the state. The task is to create “smart” and techno-savvy citizens to help Canada compete. Hence the preoccupation with jobs, skills and the workplace. This group is impressed by globalisation and uncritically endorses the TINA (“there-is-no-alternative”) principle.

The *leitmotif* of this discourse is the solitary learner gazing at a computer screen. Advocates uncritically endorse the “knowledge economy.”

A typical Canadian response to this bifurcation would be to dismiss it as a false binary opposition and try to scramble onto a middle ground. Although some academics try to straddle the fence dividing these discourses, it is a tough task.

At the dawn of the 21st century Canada had a minority government (what people in Britain call a “hung” parliament) and it was difficult to get consent for new initiatives and programmes. Moreover, after the 2008–2010 economic downturn there was a decline in reference to the “knowledge economy” and upturn in debates about how to more quickly move coal, nickel, copper and other commodities to world markets.

The military stalemate in Afghanistan, the pressures of hosting large international events (e.g. political summits, Olympic Games) and political constipation in Ottawa have mostly silenced advocates of lifelong education or uncritical ideas about the imminent arrival of the knowledge economy. However, these were temporary distractions and, as Thomas (1961) long ago noted, in a democratic state where people participate in creating their future, building a learning society is not an option. Hence, there will be continuing struggles between advocates of social democratic notions of lifelong education and neoliberal-inspired renderings of lifelong learning.

## Unresolved problems

Nested in both discourses are numerous problems left from earlier eras. Such as:

### Concerning the political economy of the learning society

- *Empty slogan*: In many places, lifelong learning has been reduced to an empty slogan, a decontextualised set of educational techniques gutted of politicality – too often used as a rationale for inflicting (often oppressive and authoritarian) forms of training or new skills and competencies.
- *New market*: Lifelong learning is constructed as a market for higher (or continuing) education. Hence, there is primary, secondary and higher education – followed by lifelong learning.
- *Farm-gate intellectuals*: Little is known about high-performing farm-gate learners who, without the benefit of formal education, change the way life is lived by learning in non-formal or informal settings (e.g. Peter Jackson, film; Bill Gates; software) (Boshier, 2002). Almost every country has farm-gate intellectuals but little is known about why or how they learn.
- *Atomisation*: Instead of respecting the systemic nature of lifelong education and the learning society, users break it into pieces and adopt some parts while rejecting others. Hence, many people still regard lifelong education as a synonym for adult or non-formal education.

### Concerning the vertical (lifelong) dimension of the learning society

- *Parents provide inappropriate advice to youngsters*: In Canada, there is no national daycare programme and early childhood education is only available to parents who can afford it. Too many parents cannot provide children with travel, sports and other adventures which create curiosity and build a zest for learning. Parents too often counsel children into post-secondary computer or business courses when arts and humanities are needed.
- *No educational leave*: The ability to opt into and out of opportunities for learning throughout life often depends on securing leave from work. With the intensification of work, a growing neoliberalism and hyper-competitiveness, there has been a decline in opportunities for paid or unpaid leave.
- *Irrelevant requirements and prerequisites*: Too many structural and institutional barriers impede the ability of learners to move from one learning setting to another. There are still too many unreasonable and illogical prerequisites left from an era when education was thought to be a linear and compartmentalised process. Even admission to university graduate programmes is encumbered by ludicrous requirements and mean-spirited faculty members and administrators.
- *Elderly people are trivialised*: In too many places “elderly learning” is

intended to foster docility with harmless hobbies and amusements. Older people are capable of but largely denied opportunities to engage in serious intellectual work.

### **Concerning the horizontal (lifewide) dimension of the learning society**

- *Formal settings dominate:* Nearly 40 years after Faure, formal settings still dominate and, because of stress fuelled by neoliberalism, parents are now even more anxious to get children into the best schools and universities. Formal and non-formal settings are like two parallel railway lines that never touch. The anticipated horizontal integration of formal and non-formal settings has not happened.
- *Folding the non-formal into the formal:* Too many educators in formal settings try to quell the power and potential of non-formal settings by folding them into orthodox school, college or university operations. Field-trips, service learning and internships are used to consolidate the authority of formal settings. The exchange between formal and non-formal settings should involve reciprocity and respect.
- *Status differentials:* In too many places learning in formal settings secures recognisable credentials and high status while non-formal settings lack prestige. During the last 30 years there has been no discernible erosion of status differentials separating formal and non-formal settings. If anything, the situation for non-formal settings is now worse than in the 1970s.

### **Road ahead**

At the dawn of the 21st century certain Canadians claimed there was a “knowledge-based economy” on the road ahead. They even used an acronym – KBES – “knowledge-based economy and society.” The argument ran like this. Because of globalisation and intensification of the role played by information technologies, resource extraction economies would soon be shunted aside by the about-to-arrive knowledge-based society. Instead of coal, wood or minerals, “knowledge” would make cash registers ring.

When the 2008 US sub-prime mortgage crisis triggered a global economic downturn, exactly the opposite happened. For panicking politicians and frightened citizens the resource extraction economy looked like a better bet than knowledge.

In 2010 Ottawa withdrew funding from the Canadian Council on Learning. In an editorial, Canada’s leading national newspaper called the Council on Learning “a bit of a sinkhole.... Does it serve a useful purpose, is it worth the price, would it be missed if it were gone? ... If the Canadian Council on Learning is essential, corporations or the charitable sector or both should flock to its rescue” (*Globe and Mail*, Editorial, 11 January, 2010). A few academics protested against cuts to the Council of Learning but rescue efforts were short-

lived. The federal government said they needed new and more precisely-focused notions of learning better attuned to the labour market.

Cuts to the Canadian Council of Learning suggested neoliberalism had deepened and priorities narrowed. Funding cuts also put nongovernmental organisations on the defensive and not one province had made major reforms of the kind anticipated by Faure, Delors or even the OECD. Even so, the words “lifelong learning” continued to appear in numerous government documents and even the Canadian Coast Guard opted to become a learning organisation. In villages, districts, towns and cities, there was still a plethora of festive and enjoyable learning events. Advocates of lifelong education are remarkably resilient and when citizen efforts to educate themselves were stamped out in one place, they would pop up elsewhere.

Profound differences separate Canadians who see lifelong education as a corollary of citizenship from those who consider it the cornerstone of the global economy. Even so, few citizens or politicians are actively hostile to the notion of learning throughout life (and in a broad array of settings). But, when educational leaders conflate lifelong education with lifelong learning or it means one thing today and something else tomorrow, citizens have good reasons to be confused. Yet, in Canada, immigrants have always been intensely interested in learning and great satisfaction is derived from looking over the fence and learning from neighbours.

In the 1980s citizens were urged to think globally and act locally. Today, the better remedy for what ails Canada and the planet is to think, learn and act locally.

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# 8

## Policy developments towards lifelong learning in the European Union

Heribert Hinzen<sup>1</sup>

### Introduction

There have been major developments in lifelong learning theory, policy and practice over the past decades. In a lively exchange of ideas, concepts, and approaches, players in the field of lifelong learning have been in the process of leveraging synergies across national and international borders in theoretical perspectives and practical experience.

The Delors Report to UNESCO in 1995 claimed that “learning throughout life” is the key to a better future. As educationists we should do all what is possible to create opportunities to fulfil individuals’ learning needs and related capacities. Learning must be associated with all dimensions of life, expressed in terms of lifelong, life-wide and life-deep. And let me just continue enumerating: it could happen at all times, levels and forms, be they formal, non-formal or informal.

The adult education and learning sector has been receiving greater attention and recognition within the framework of lifelong learning, an area which has meanwhile become a major paradigm in the theory and practice of education, particularly within the context of global, regional and national institutions such as UNESCO, OECD, the European Union (EU), and the German Adult Education Association (DVV). The policies, programmes, approaches, and even funding procedures of organisations at all three levels have significant bearing on one another. The following article examines the upsurge of interaction in the field of adult education and presents some of its outcomes.

In the light of contemporary documents and conferences on lifelong learning, and with reference to selected adult education organisations and professional adult educators and scholars, the presentation covers the influence exerted on national developments by European policy, especially as promoted by the EU, and perhaps *vice versa* as well.

## EU Memorandum on Lifelong Learning – What do citizens think?

In 2000, the Directorate General Education and Culture of the European Commission published its *Memorandum on Lifelong Learning* which was very widely circulated throughout the EU and is still well-worth reading today. The *Memorandum* has been a turning-point in the European debate by presenting six key messages without which the creation of a learning society would be extremely difficult. After intensive consultation among member states, with civil society and professional bodies, this was turned into a *Communication on Creating a European Area of Lifelong Learning*, asking for priority action in

- valuing learning
- information, guidance and counselling
- investing time and money in learning
- bringing together learners and learning opportunities
- basic skills
- innovative pedagogy.

Furthermore, this document leaves no doubt that as the leading concept for education and training it should foster active citizenship, strengthen personal growth and secure social inclusion, thus going far beyond employability.

The consultation process of the Commission elicited thousands of replies. In 2001, after reviewing all the comments it had received, the Commission issued a follow-up communication entitled *Making a European area of Lifelong Learning a Reality*, quoting the following Chinese proverb on the title page: “When planning for a year, plant corn. When planning for a decade, plant trees. When planning for life, train and educate people.” For more detailed information see: [http://europa.eu/index\\_en.htm](http://europa.eu/index_en.htm)

This process made an important contribution to the growing perception of adult education as a decentralised system of universally-available learning opportunities that cover general education and citizenship education in offers which are designed to enhance employability and which are organised close to the people through local learning centres. It helped to rekindle recognition for our good old four-pillar model of education with areas in the lifelong learning programme called

- Comenius – schools
- Leonardo – vocational training
- Erasmus – higher education
- Grundtvig – adult education.

In the wake of the PISA (Programme for International Student Assessment) results more attention has been paid to improving permeability between the

different education sectors and to the promotion of non-formal and informal learning.

Well, this is what politicians and professionals think. But what do European citizens think of lifelong learning? It was CEDEFOP who provided valuable research results by doing a survey in the EU member countries:

- nine in ten think lifelong learning is important
- eight in ten support an integrated approach, looking at employability, personal development, active citizenship and social cohesion
- the majority thinks it is for all ages
- only 14% think it should be for the young only
- 45% think it should be for those who failed school
- the majority learns best in informal settings.

There can be no doubt that these opinions of European citizens strengthen the importance of adult education and training in lifelong learning. They appreciate informal learning opportunities, but do they thereby criticise formal settings, or their personal prior experiences in schools or colleges? However we try to understand the results, one thing seems to be clear: European citizens think learning in adult life is important.

## EAEA Study “Adult Education Trends and Issues in Europe”

Core policy statements are customarily prepared on the basis of studies. For the policy statement on adult learning, the European Commission launched several studies through a tender procedure. Adult education issues and trends in Europe was the theme of one study that was of particular interest to the European Association for the Education of Adults (EAEA), along with another study, the object of which was to compile information on the most relevant providers of adult education in the countries of Europe. The study, which was translated into a variety of languages and distributed on a large scale internationally, has received widespread acclaim. The text can be accessed at the EAEA website, via [www.eaea.org](http://www.eaea.org), together with a wide range of other documents.

The study examined the situation of educational policy, legislation, and financing of adult education. It explored reasons for non-participation and strategies for facilitating participation. It discussed basic skills and key qualifications, dealt with issues of certification and accreditation, shed light on the quality of training and re-training, and looked at the greater picture of adult education under considerations of demography and migration. In addition to a large number of conclusions and recommendations, the final chapter names five key aspects that require implementation and support:

- a holistic, total, integrated, systemic and all-embracing grasp and policy perspective on adult learning and the resulting provision
- core public funding, especially for the disadvantaged, with a stable and sustainable locally-based infrastructure
- high quality of provision and quality of the personnel involved
- recognition and credit for non-formal and informal alongside formal adult education and learning
- simple key indicators, together with support for and use of good research and statistics

### From *It is never too late to learn* to *It is always a good time to learn*

The importance of adult education as part of lifelong learning was highlighted in a policy paper issued by the European Commission. The Communication *Adult education: It is never too late to learn* from 2006 stresses five key policy areas where intervention is necessary:

- lifting the barriers to participation
- ensuring the quality of adult learning
- recognition and validation of learning outcomes
- investing in the ageing population and migrants
- indicators and benchmarks.

The specific nature of adult education in the context of lifelong learning is spelled out in the document. The aim of the Communication from 2008 is to outline a perspective for the educational policy of the Commission and the Member States. The follow-up document, entitled *Action Plan on Adult Learning. It is always a good time to learn*, translates this perspective into a concrete plan of action. The consultation process leading up to this document emphasised three key, strongly-interconnected elements:

- the policies adopted to meet the needs and demands of society and the economy;
- the structures for governance including the quality, efficiency and accountability of the adult learning system; and
- the delivery systems – including learning activities, learning support and recognition of learning outcomes – which address the motivation and learning needs of learners in the context of the needs and demands of society and the economy.

The Communication proceeds with an invitation to the Member States and the Commission to participate in the Action Plan. Outlining five strategic lines of action, it urges them to

- analyse the effects of reforms in all sectors of education and training in Member States on adult learning;
- improve the quality of provision in the adult learning sector;
- increase the possibilities for adults to go 'one step up' – to achieve a qualification at least one level higher than before;
- speed up the process of assessment of skills and social competences and having them validated and recognised in terms of learning outcomes;
- improve mechanisms to monitor the adult learning sector.

From the opening statement of the Communication, the message is clear: "Adult learning is a key and vital component of lifelong learning."

## The Golden Triangle: Policy – Legislation – Financing

It may sound a bit surprising, but as soon as we accept that adults are interested in and need lifelong learning opportunities then we are suddenly confronted with a simple reality: if the highest number of the population are adults then adult education should become the largest part of the education sector, and why should it not receive as much, or according to size even more attention and support than any of the others?

In almost no country do Governments find it difficult to have a policy for schools or higher education: usually there is legislation for both of them, and there is financial provision, though often not high enough. It is very often different for adult education where most Governments find it difficult to do the necessary. There may be even more countries in the world without adult education policies, or without legislation, and even more where often only meagre finances are available. Why is that so? What could be the possible reasons? We hear of the complexity of what is then described as the adult education and training market where there are so many players and where nobody wants to be regulated and controlled by others. And then there is not enough money for teachers and schools anyway.

It may be too dark a picture that I am drawing. This is especially for me, coming from Germany which is a federal republic of 16 Länder or provinces, and where responsibility for policy and legislation on education and culture is at the provincial and not the national level. So we have more than ten laws on adult education, which may vary greatly from place to place. For financial aspects there is almost a similar degree of variation: in some the level is minor compared to a substantial basic funding in others, though hardly improving and more often declining in recent years. But there are some developments to the better. A good example is the EU itself. Ever since education and culture became a policy area via the Maastricht Treaty in 1992 we can note serious attempts to develop lifelong learning and, within this process, adult education into a consistent concept and system. We have not

forgotten: in the first Socrates programme there was no distinct adult education component; nowadays there is Grundtvig for adult education.

It may not be wrong to expect a substantial proportion by Government from public sources, not only because most of the tax-payers are adults. But if we argue for equality in a four-pillars approach to the education sector then adult education becomes a public responsibility, in order to support adult learning. If I may be allowed to take Germany as an example again then I should like to point to the financing of our community adult education centres (Volkshochschulen, VHS) at the local level. For a long time we used to have an almost equal sharing of three parties: one third coming via legislation from the provincial Government, one third from the municipality or village council, and then the individuals contributed via fees. It would take some time to go into greater detail, as not all courses cost the same, some are free, or are subsidised for certain groups.

The private sector and many companies see further education and the training of their employees as an investment in their human resources, sometimes even balanced as human capital. Here again, this investment may not be high enough, and it may more often be seen in larger companies. But we should clearly state that the privatisation of adult education financing has reached a certain limit, and through individuals' and companies' contributions it has always been a significant share. We have seen a quite interesting diversity of models in financing adult education coming up recently in different countries. When looking at the demand and supply sides, many professionals still claim a basic (at least) institutional funding as a prerequisite for quality provision. Others prefer to support the individual more directly through grant schemes and learning accounts. The debate and recommendations continue.

In the preamble to the EU Council's Conclusions of 22 May 2008 on Adult Learning, comprehensive reference is made to earlier European Union proclamations which had significant bearing on the development of a system of adult education in the context of lifelong learning. The declaration begins by citing the Lisbon European Council Conclusions which spell out the intention to create a high-performance educational system capable of converting the European Union into the most modern (and consequently the most competitive) economy in the world. And it concludes by calling attention to the most recent statements on the European Qualifications Framework (EQF), to the need for a unified framework for adult education indicators and benchmarks, and to the importance of developing European instruments to identify and validate informal and non-formal learning achievements. So far only partial success has been achieved on the difficult road toward upgrading the qualifications of low-skilled workers, reducing the high rate of early school-leavers, and remedying the deficits of elementary schooling, all of which are basic prerequisites for bringing about social inclusion, widening participation and enhancing employability. In this



respect, the following demands of the Council are the logical consequence:

“1. Adult learning should be given stronger emphasis and more effective support at national level, as part of overall efforts to develop a culture of lifelong learning. ...

5. The cross-sectoral nature, diversity, complexity and richness of adult learning impose the need for an integrated approach involving all stakeholders, including those at local and regional level, the social partners and NGOs.”

The annex to the Conclusions puts the onus upon the Member States to “endeavour to ensure an adequate share for adult learning when allocating financial resources across the various educational sectors, in line with a lifelong learning approach.”

### And one more triangle: General – Civic – Vocational

In the past we often enjoyed insisting on a dichotomy between general and vocational adult continuing education, as if they were to be seen as completely separate. Today we prefer to see the inter-relationships in a stronger way: much of the general often has immediate impact for the vocational. The whole debate on key competencies and core qualifications points out that the general is important for the vocational – and vice versa.

Here, the best examples are languages and computer skills. Before the process of European integration and EU enlargement in the early 1990s really intensified, definitely influenced by the systems change in the East, knowledge of more than the mother tongue was just nice and beneficial. But today? Is it not high-time to accept that we all need a second or even third language to really act competently within Europe? And therefore more and better language learning is not only a must in schools: the same is true for adult education, which is even empirically proven by the more than three million adults who come yearly to the local VHS in Germany for language learning.

When discussing literacy skills, we used to think of reading, writing and numeracy. Today we have to add all that is associated to the different levels of what information technology requires. Competence in computer skills has almost become a prerequisite for our daily life, and which office and even the smallest company can do without them? They are becoming a general basic skill, including for vocational purposes.

This leads to an understanding where it is not the dichotomy between the general and the vocational which is of interest, but the need to look out for the continuum in the advancement of both, and the bridges between the two. And it was again the EU who, by proclaiming the year 2005 as the year of democratic citizenship through education, which fosters links between learning and living in a democratic society. Adult education has to

build on what was achieved in childhood and youth, and nurture the desire to be an active citizen as well as provide the skills to do so competently through civic adult education. It may be noted here that the EAEA in that year devoted their Grundtvig award on adult education to best-practice examples of adult civic education and learning: see [www.eaea.org](http://www.eaea.org)

Competitiveness, employability and mobility: these are key words in the Lisbon Council strategy which called on the EU to become the most competitive economy in the process of globalisation. Many factors play decisive roles in implementation, including education and training in a lifelong perspective. How do we improve workforce employability without providing good quality in general and vocational training for youth and adults continuously? How do we strengthen mobility without training in languages and intercultural skills for younger and older adults?

Looking formerly at benchmarks for participation rates in different European countries and the EU, it was predominantly the case that numbers of pupils in secondary schools or students in higher education were the focus. Today, there are benchmarks for participation rates in adult education developed. This is difficult, especially the more we go beyond the formal and highly-institutionalised adult education providers. But it seems to be important enough to start the preparation of a system to collect relevant statistics at a European level. How do we make sure that the interests of adult learners are taken seriously? In reality, the majority want to learn a language informally, still systematically using books and audiovisuals, but with no attempt to go for a certificate connected with whatever framework of qualifications. However, this may change and with the European Language Certificate system many languages at different levels are covered; see [www.telc.net](http://www.telc.net)

## German Ministry of Education and Research: Concept and financing of lifelong learning

A government position paper on lifelong learning (*Konzeption der Bundesregierung zum Lernen im Lebenslauf*) was presented on 6 May 2008 by the Federal Ministry for Education and Research (BMBF) to the German Parliamentary Committee "Education, Research and Technology Assessment". The paper was based on recommendations presented by the Committee on Innovation in Continuing Training which was convened by the Ministry. In the first paragraphs, the paper states:

"Lifelong learning is one of the biggest political and societal challenges facing Germany. The realisation of lifelong learning is decisive for the prospects of the individual, the success of industry and the future of society... Globalisation and the knowledge society are confronting people with great challenges which are made even more demanding as

a result of demographic change. Lifelong learning must serve to continuously adapt and expand knowledge and the ability to apply the knowledge acquired."

Pointing out that learning enables people to enhance their employability and exercise their civic duty, and that it is also a crucial factor for integrating people with a migrant background into German society, the paper calls for the systematic improvement of continuing education schemes to increase participation by widening the range of programmes and measures. It does not leave any illusions about the fact that the strategies it describes require additional funding:

"These objectives call for considerable effort on the part of all those involved in financing continuing education to mobilise resources above and beyond funding mechanisms that already exist. The responsibility of enterprises for the continued training of their employees must be clearly emphasised in this connection. Employers should be encouraged to step up their commitment toward financing continuing education. The same applies for unions and employers' associations, the so-called 'social partners,' and their responsibility to provide further training for employees."

A key objective is to increase participation in formal continuing education (courses and seminars) in the 25 to 64 years age bracket from the current level of 43% to 50% by the year 2015. Special efforts will be required in particular to reach people with low qualifications, considering the underrepresentation of this group in continuing education programmes.

The concept outlines a number of concrete strategies with suggestions on how to implement them. Many of the proposed measures involve improved financing schemes designed to create a wide variety of incentives and mechanisms that will facilitate access to continuing education and further training. Approaches include the concept of a continuing education voucher (*Bildungsprämie*), "time accounts" for learning (*Lernzeitkonten*), grants oriented to career advancement (*Aufstiegsstipendien*); and adopting legislation to promote further training geared to advancement (*Aufstiegsfortbildungsförderungsgesetz* AFBG). Improved educational counselling is also stressed as a crucial element in the successful implementation of the proposed measures. (For additional information see: [www.bmbf.de](http://www.bmbf.de))

The debate surrounding the means of financing adult education as part of lifelong learning was amplified in a parliamentary hearing on the topic, "Lifelong Learning – Need and Funding" held in January 2007 by the German Parliamentary Committee "Education, Research and Technology Assessment". The hearing dealt with the potential of an Adult Education Promotion Act (*Erwachsenenbildungsförderungsgesetz*) and the legally-defined

right to continuing education. Questions no. 20 and 21 in the list of issues, on which the hearing focused, gave the German Adult Education Association (DVV) an excellent opportunity to advocate the need to subsidise infrastructure development not only in the school system, but also in Germany's system of community adult education centres, the *Volkshochschulen*.

The political debate on the implementation of a comprehensive system of lifelong learning in the Federal Republic of Germany has become more intense in recent years. Increasingly, more and better education at all levels is held to be of vital importance in order to cope successfully with the challenges posed by the economic situation. This was the central issue at the Education Summit in 2008 on "Qualification Initiative for Germany – Advancement through Education" which brought together the German Chancellor and the prime ministers of the *Länder*. DVV took the opportunity through a number of initiatives organised in connection with the summit to make itself heard. The position paper issued by DVV for the occasion stressed that "continuing education and learning throughout life must play a key role" in the process of building Germany into an Education Republic. Calling attention to the effects of globalisation and rapid technological change, it points out how crucial learning is to improve chances for people to obtain employment and participate in society and states that "the fundamental importance of continuing education for individual advancement as well as for the economic and social development of Germany has long been scientifically established beyond dispute."

In a section of concrete demands entitled "Urgent Tasks" the position paper calls upon the government to strengthen the adult education sector in the interest of learners and in line with European and international cornerstones of lifelong learning. Among other things, specific claims are asserted for:

"1. 'Second chance' through continuing education...

It must be made bindingly possible for every adult – independent of income – to access literacy measures and attend programmes leading to primary, secondary, tertiary and vocational level certification...

5. Six percent of the education budget for adult education

Within the framework of EU policy on the promotion of lifelong learning (from the Memorandum on Lifelong Learning, 2000 to Action Plan, 2007) the European Union recognises continuing education as an invaluable field of education in its own right. The future funding of continuing education in Germany must be oriented to European developments and international benchmarks. The target is to appropriate 6% of the entire national education budget for continuing education – including literacy and basic education programmes... Such an investment might even make it possible to reach the target set by the United Nations Literacy Decade and to halve the number of (functional) illiterates by the year 2015..." ([www.dvv-international.de/files](http://www.dvv-international.de/files))

## Prospects

Who is preparing what kind of learning agenda in adult education in the near future? Where are our societies moving in this era of globalization? We need qualified manpower, but what are the qualifications required for the future labour market? Many times we have re-trained our unemployed adults for jobs which were gone already when the training ended. Who knows more and better about the kind of good and prospective adult education and training programmes, which not only follow market forces and the further advancement of mastering the information technologies successfully?

Is the consequence of the concept of lifelong learning creating a sort of “must” for lifelong schooling? Or should we in adult education and learning not turn this fear around and enrich the lifetime cycle of learning with all our experiences from outside the classroom, from non-formal or informal, from self-organised and self-directed forms of education and training?

It has been the aim here to concentrate on a number of significant developments that have taken place in the field of adult education within a relatively short span of time. The issues left to deal with are many: In what ways has the paradigm of lifelong learning had an impact on society? What place is accorded to adult education in the context of lifelong learning? What significance is attached to the structures of adult education? What are the adult education strategies which are being debated within the “magic triangle” framework of policy, legislation, and finance? The multitude of aspects that merit closer attention is clear from these and other certainly no less important questions pertaining to quality, basic and continued training of staff, research, accessibility and target groups. While the focus here was on European and German views and developments, UNESCO focus has a global orientation, in adult education, especially through its series of world conferences, CONFINTEA.

Now, however, we are called upon to focus our sights on the implementation of the Belem Framework for Action *Harnessing the power and potential of adult learning and education for a viable future* as the outcome document of CONFINTEA VI in Brazil, in an effort to ensure the conclusion of binding decisions that will lay the political, legal, and financial groundwork for securing our field and improving our chances of developing the sector and the profession of adult education for the future. In this process, the more affluent countries must work together with the world’s development organisations to assist the poor and less developed countries in their attempts to reach our common goals. The Shanghai Forum on Lifelong Learning is a highly welcome moment to inform each other and debate possible ways of implementation now or in the near future.

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# 9 Policy framework designed to build a learning society in Thailand

Kasama Varavarn<sup>1</sup>

The concept of lifelong learning was introduced in Thailand over 40 years ago. Adult educators were among the first to adopt the idea and initiate projects to facilitate lifelong learning. But, it took over two decades before becoming recognised as the goal of education. The vision of a learning society came much later, but was immediately embraced by the government and the public at large and incorporated in the national development strategy.

While remarkable progress has been made towards strengthening the learning society, the grave situation presently taking place in Thailand clearly illustrates critical shortcomings and the need to learn from other countries.

In this paper, I shall limit the discussion to three key strategies in our efforts to build a learning society in terms of lessons learned as well as challenges for the future.

## Developing well-informed and self-directed learners

From the outset, it was recognised that the pre-condition for a learning society is the quality of the population. The government has placed priority in providing basic education for all, utilising both formal schooling and innovative non-formal education programmes to reach the out-of-school population. At the same time, the curriculum was gradually transformed from rote learning to give more emphasis to self-directed learning and critical thinking abilities.

The famous approach widely known as the Khit Phen Philosophy was introduced over 40 years ago to move away from providing basic literacy and ready-made answers to be memorised and tested, towards encouraging learners to explore alternatives and to come to the most appropriate solutions for individual learners. At present, both knowledge acquisition and

critical thinking abilities have become the key learning objectives of the national curriculum.

Thailand is proud to have achieved high literacy rates, close to universal primary education, 80 per cent enrolment at secondary level with nearly 40 per cent of graduates continue to higher education. But we are acutely aware of the dualistic nature of our society. Our adult population, although literate, on the average receives only eight years of education and is at a disadvantage in coping with the new challenges of globalisation which are penetrating even the remotest communities.

A Khit-Phen learner in present-day society needs to be able to nurture the rich root of heritage as well as to become well-equipped with twenty-first century skills. These include computer literacy, legal literacy, scientific literacy, media literacy as well as multi-cultural skills.

There have been many innovative experiences in these areas. Our challenge is to go to a bigger scale so that our population will be prepared to participate in and benefit from the learning society.

## Providing lifelong learning opportunities

The Thai village newspaper centre was widely recognised as one of the early attempts to facilitate learning beyond literacy programmes. The project has long ended, with newspaper delivery networks now extending into rural communities and the establishment of public libraries across the country. There have also been many other innovative attempts to enrich learning opportunities.

The indigenous learning networks which have long sustained the survival of the communities have been strengthened to serve as a vehicle for lifelong learning. Research on traditional knowledge in all fields has been carried out with attempts to enrich traditional knowledge with modern technical know-how.

Buddhist monks, folk artists and local artisans have been assisted to transform both their methodology and content to become more relevant in present-day society and to participate in teaching/learning in various educational programmes.

By institutionalising learning society as the vision of the overall national development goal, development agencies with extensive networks have been mobilised to help enrich learning opportunities. Village health volunteers, for example, have helped to provide health education in schools, assisted teachers to monitor students' health and train mothers to improve child-rearing practices, including story-telling techniques and how to produce hand-made books.

To bridge the digital divide, the government has invested in connecting all schools with the internet and satellite broadcasting, setting up sub-district



internet centres, supporting production of online educational content and various forms of “edutainment” programmes.

These efforts have greatly enriched the learning environment but have not adequately bridged knowledge gaps among populations of different age groups and educational attainment. A survey of internet usage found that less than 10 per cent of content is educational. Unethical manipulation of the mass media and the internet is also on the rise with audiences indiscriminately absorbing the distorted information.

The recent crisis in Thailand illustrates another shortcoming in our attempt to build a learning society. All forms of communication have been employed by both sides of the political divide to win public support, from international media to traditional means of communication. The audience, however, is quite selective in its sources of information. While the so-called colored shirts utilise online social networks, the red shirts rely primarily on community radio and face-to-face communication. Unfortunately, there is no effective mechanism for dialogue beyond their immediate networks.

In building a learning society, we need to ensure access to diverse sources of information, opportunities for dialogue and sharing of experiences, the ethical and the quality dimensions of information, knowledge management mechanisms to collect, analyse, apply, generate and share both traditional and modern repertoires of knowledge.

## Recognising the evolving roles of government

The role of government in facilitating lifelong learning and strengthening the learning society has long been the topic of debate. Many policy-makers limit the responsibility of the government to formal education and, to a certain extent, to lifelong learning. They are of the opinion that a learning society cannot be built by government intervention but must be a natural outcome of an educated society.

Our experiences have shown that while the success of the learning society depends on the ability to mobilise beyond the government sector, the government has crucial roles to perform.

At the outset, when the needs for lifelong learning have not been fully recognised, the government has to take more proactive roles as primary organiser and advocate with a view to strengthening the private sector and the community's sense of shared responsibility and ownership.

With increasing demands for learning opportunities and more diversified providers, the government can and should shift its functions towards assessing ongoing situations, investing in services that are not commercially viable, identifying newly marginalised groups, protecting the opportunities of the disadvantaged and providing support and incentives to mobilise greater participation.

Three strategies, in particular, deserve special mention, namely legislations, decentralisation and participation.

**Legislation** can, potentially, serve as an important strategy in ensuring sustained support for lifelong learning. But without adequate understanding, the laws can hamper rather than facilitate lifelong learning.

**Decentralisation** to the operational levels, to school boards and to local government has proved to be effective but only after the needs for lifelong learning have been firmly recognised.

**Participation** is critical to the sustainability of lifelong learning society, but both formal and informal measures must be utilised to elicit, develop and strengthen meaningful participation and transform the relationships between the previous providers and the recipients of services.

Lessons from the Thai experiences can be summarised as follows:

- Lifelong Learning and a learning society must be institutionalised as the goals of education and development policies.
- Well-informed and self-directed learners are preconditions for a learning society and can only be achieved through a strategy which is designed to bring about synergy between formal, non-formal and informal education.
- Government cannot own or bring about a learning society, but does have concrete roles to play. Well-planned and well-phased strategies towards mobilisation, decentralisation and participation are crucial to the effectiveness and sustainability of the learning society.

Finally, do not be overwhelmed by the concepts of lifelong learning and learning society. Think big, begin small and gradually go to scale, being guided by the widening needs of the learners. As we are meeting in Shanghai, it is indeed most appropriate to take heed of a popular Thai saying, “Manage your business in the Chinese way. Begin with a small food stall, then gradually expand to a restaurant and, finally, own a chain of restaurants.”

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- 1 Ms Kasama Varavarn is the former Secretary-General, Basic Education Commission, Ministry of Education, Thailand.

# 10 Lifelong learning and connected-up development: insights from South Africa

Shirley Walters<sup>1</sup>

## Introduction

Lifelong learning through the four major stages of people's development (Schuller and Watson 2009) embodies the need for integrated, connected-up approaches to development. I will reference briefly three examples in action of connected-up approaches to development from South Africa which are examples of national, regional and institutional approaches to lifelong learning. They are: the National Qualifications Framework, the Learning Cape, and the University of Western Cape. I will start with highlighting the social purposes of lifelong learning and the socio-economic and political context, both of which frame the discussion.

## Lifelong learning – to what end?

For lifelong learning to be used strategically for the betterment of the human and planetary condition, it is important to remind ourselves of the key social purposes of lifelong learning. I will not rehearse all of these but will mention a couple that I find pertinent. The first is that lifelong learning:

...connects individuals and groups to the structures of social, political and economic activity in both local and global contexts, and emphasizes women and men, girls and boys, as agents of their own history in all aspects of their lives. (Adapted from: Cape Town Statement on Characteristics of Lifelong Learning Higher Education Institutions 2001)

This quote reminds us that lifelong learning is about human agency across the lifespan and in all aspects of our personal, cultural, social, political or economic lives, both locally and globally.

The second quote comes from the recent conference, CONFINTEA VI, and expands understandings of the critical relationships amongst all life forms if we are to have an environmentally sustainable and socially just future.

“The planet will not survive unless it becomes a learning planet”  
(Paul Bélanger, CONFINTEA VI, 2009)

With these aspirational social purposes in mind I turn to the South African context within which we live.

## South African context

Our histories and material conditions shape what is possible, therefore it is necessary to give brief pointers to the social, political and economic conditions within which lifelong learning is developing. South Africa is a country of 48 million people. It has the following characteristics:

- Middle-income country (USD 3,600 per capita income)
- Large proportion of young people (51% below 25)
- Life expectancy in 2007 had decreased to 50 years due to the impact of AIDS and related illnesses
- 45% live below national poverty line (USD 70 per month)
- Unemployment rate between 25% and 40%
- Great polarity between rich and poor
- Democratic constitution with strong human rights aspirations
- Strong and active civil society
- Ethnically diverse with 11 official national languages.

Lifelong learning in South Africa therefore needs to take into account a highly diverse society with both a highly developed economy amongst a certain sector and widespread poverty amongst the majority population.

## Lifelong learning and connected-up development

One of the biggest challenges of socio-economic development in any society is its ability to work across different sectors in order to achieve a more integrated approach. As society is necessarily structured to cater effectively for particular needs like health, agriculture, education or environment, institutional structures end up functioning largely in isolation from one another. Personal and community development can result in being fractured and piecemeal from the individual or communal viewpoints. Societies therefore need various mechanisms, approaches or strategies to re-connect

the different parts to achieve more integrated approaches for the good of efficient, effective personal, economic and social development. This is attempted, more or less successfully, through legislation, regulatory frameworks, cross-cutting projects and programmes or institutional structures. The philosophy and approaches to lifelong learning can potentially assist this reintegration process so that the people do have learning support from 'cradle to grave', through their different life stages. The three examples I turn to now are illustrative of these attempts in action.

### *National Qualifications Framework*

South Africa's National Qualifications Framework (NQF) is one of the first-generation NQFs in the world, and the first in a 'developing country'. One of the first education and training strategies adopted by the newly-formed democratic government in 1994 was to begin to establish the NQF to help achieve access for the previously-excluded black majority; integration and progression of learners across the education and training systems, in order to achieve redress for the past injustices. Lifelong learning was a key ambition to be built through the NQF.

Sixteen years later, with the benefit of hindsight, there is recognition that the ambitions were unrealisable. However, because qualifications are a key currency with which individuals and collectives transact their positions in society, the NQF has been a very important structure to facilitate communication, collaboration and coordination across the systems. The NQF has now entered a new phase and, amongst other things, is highlighting the importance of guidance and counselling for learners across the lifespan; recognition of prior learning; credit accumulation and transfer of credits; and research-based approaches to learning and work.

The NQF is helping build communities of trust across all parts of the education and training system nationally; it is also working closely with counterparts internationally to enable the flow of people across national borders. For lifelong learning to succeed, there must be trust amongst providers, across sectors, across national borders, to facilitate learners' successful access and progress both locally and globally. Lower and middle income countries do not have the rich institutional infrastructures of richer countries; therefore, for South Africa the NQF is playing an important developmental role. (For more information on the background and critical debate on the NQF see, for example, Lugg 2009.)

Insights from the NQF experiences include: the importance of coherent and systemic implementation; the slow nature of educational transformation; realisation that qualifications frameworks can contribute to transformation provided they are seen as a platform for communication, cooperation and coordination; guidance and counselling across the system is critical; recognition of prior learning is an important pedagogical bridge; there is need for a strong experimental scientific approach; and the strong

move to privilege outcomes-based education as a template for the whole system did not succeed.

In summary, NQFs are best understood as works-in-progress and as contestable artefacts of modern society, which can contribute in a modest way to how a society manages the relations between education, training, work and development by finding 'common ground' between distinct forms of learning and articulation with work and development practices. They are useful vehicles for communication, cooperation and coordination across education, training, work and development (Walters and Parker 2008).

### *The Learning Cape*

The second example of trying to implement lifelong learning on a provincial basis is the Learning Cape. This has not been very successful but it is important to recognise both the possibilities and limitations of creating learning regions or learning cities, as part of lifelong learning for connected-up development.

The advantage of a 'learning region' is that it demarcates a geographical space within which more holistic, integrated possibilities are created to coordinate systems, policies and practices for lifelong learning and development. For our purposes here, I will just highlight some of the lessons learnt from the Learning Cape. (For a more detailed account refer to Walters 2009.)

The creation of a learning region requires strong political will and long-term vision; it needs fundamental shifts in thinking about education, training, work and development, as it must include, for example, issues of transport, safety, the economy, health, education and training –across generations and across sectors. As we know, for example, if women are not able to get to class because of threats of violence or lack of transport, their learning will be inhibited; or if children are malnourished their abilities to concentrate and study will be limited. Therefore holistic approaches to development are required. The success of a learning region is dependent on contingent conditions which include 'communities of trust' amongst institutions, communities, and sectors. There is a constant interplay of pedagogy, politics and organisation. A learning region which is to attempt deep learning for all citizens across all ages is an extremely complex undertaking and a very challenging 'big idea'.

### *Lifelong learning in a university: University of the Western Cape*

In order for lifelong learning to move beyond rhetorical ambition, but to a systematic approach to the functioning of an institution like a university, it needs to recognise that all aspects of the institution are affected. These include: strategic partnerships and linkages; overarching regulatory frame-

works; research; teaching and learning processes; administration policies and mechanisms; student support systems and services. (UWC and UIE 2001) Lifelong learning is again concerned with connected-up development within the institution and between the institution and its surrounding communities.

The approach to lifelong learning within the university will also depend on the social purposes which are seen to underpin the lifelong learning mission. Universities are clearly not politically neutral spaces; neither is lifelong learning.

The University of Western Cape has adopted a lifelong learning mission and it has, over the last ten years or so, been systematically implementing an approach, but as with all developments of this kind, it is not uncontested. The successes have been mixed. The story of the university's attempts has also been captured elsewhere (Walters 2005).

## Key insights

In general terms, if lifelong learning is taken seriously as a philosophy and an approach it does challenge ways of seeing from points of view of individual and collective identities; there are different understandings of knowledge; and there are shifting power relations which relate to competing social and economic purposes. Therefore lifelong learning can be very challenging to people's identities, to understandings of epistemology, and power relations. There are competing social purposes; therefore there will always be contestation. This leads to the importance of national agreement on overarching policy and legislative frameworks for lifelong learning – this is something that South Africa has not yet achieved.

If the social purposes of lifelong learning are to encourage greater social justice, environmental sustainability and fairness in society, then hard choices have to be made and the politics of the endeavour need to be recognised.

I end with two quotes which signal ways of seeing the world and the purposes of lifelong learning which demand more integrated, non-hierarchical ways of understanding and approaching socio-economic, personal and planetary development.

The first comes from a woman aboriginal leader from Australia who challenges the common approach to development work where some people are deemed to know while others do not, when Lily Walker says:

“If you come here to help me, then you are wasting your time. But if you come here because your liberation is bound up with mine, then let's begin”.

And finally, from the CONFINTEA VI conference in December 2009 and in the light of the immense challenges being faced (and gradually being acknowledged) by more people and nations around the world:

“The planet will not survive unless it becomes a learning planet”.

Within these two quotes and implicit in their perspectives, lifelong learning is not an option. Working in connected-up ways within institutions, cities or nations, and then trans-nationally, is not an option if we are concerned with long-term sustainability of life on the planet.

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# 11 Improving coordination between formal education and non-formal education in the domain of lifelong learning in Benin

Abdel Rahamane Baba-Moussa<sup>1</sup>

## Introduction

In the opinion of the international community, one of the chief roles of education is to offer everyone the opportunity to take their own destiny into their own hands and bring about, with full knowledge of the facts, the changes to their social environment that can improve their living conditions. This implies an indissoluble link between education and development.

To this end, everyone must be given access to adapted programmes of education offering equal access irrespective of age, sex, social status and living environment. On the basis of these considerations, education can no longer be confined, according to Durkheim, (1992), to the “influence exercised by adult generations on those that are not yet ready for social life” and which would aim to pass on to the child “a certain number of physical, intellectual and moral states which are demanded of him by both the political society as a whole and the special milieu for which he is specifically destined” (Durkheim, 1992). It must henceforth be regarded, according to the report by the UNESCO Commission on Education in the 21st Century, as a process that occurs throughout one’s whole life and which enables individuals to access four major constituent categories, or pillars, of learning: learning how to know, learning how to do, learning how to live with others, and learning how to be (Delors, 1996).

The first of these categories relates to all forms of learning, enabling people to transform the way in which the individual sees the world around him, evoking in them the desire to go on learning so that they can lead better lives and be a part of the development of their world; it is also known as basic education. The second pillar relates to the way in which individuals absorb the knowledge that they encounter and the uses they can make of it in their social or professional lives. It comprises all forms of learning that confer social and/or professional skills and the ability to adapt these skills to

the development of society and the world of work. The third pillar relates to learning in terms of knowledge of oneself and other people in all their social, cultural, geographic, ethnic and other forms of diversity. Such learning is necessary to enable individuals to live in peace, with mutual respect and acceptance. Finally, the fourth pillar comprises an ethical dimension since it embodies, as Charles Hadji writes in his definition of ethical education, an attempt to “stimulate within the individual the ability to judge beings, and first and foremost his own being (...) having regard to values whose universality is beyond dispute”. Learning how to be, then, means rejecting conformism in terms of behaviour and the alienation of men by machines; it means taking one’s destiny into one’s own hands and acting as a driver and beneficiary of development.

This concept of lifelong learning, which is shared by the international community, underpinned in particular the establishment of the Millennium Development Goals (MDGs) and the goals of Education For All (EFA) that are to be achieved by 2015, as well as the United Nations Literacy Decade (UNLD) and others. As a result, it is essential to provide a range of adapted forms of education to this end. That there is an ongoing “world education crisis” (Coombs, 1989) is no longer in any doubt. Education systems aligned with the school model appear to be struggling to achieve these objectives, and other solutions must be envisaged. With this in mind, Coombs proposed as long ago as the 1980s that each country should evaluate its “learning network” and its strengths and weaknesses so as to cater as well as possible to present and future needs while taking three dimensions into account:

- formal education, which is that provided within the school system;
- non-formal education, which includes “any organised, systematic educational activity carried on outside the framework of the school system to provide selected types of learning to particular subgroups in the population, adults as well as children”;
- and informal education, which is the “lifelong process by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment (from the example of family and friends, travel, books, radio, films...)” (Coombs, 1989, p. 24).

In the author’s view, these three dimensions are necessary and complementary with respect to genuinely lifelong learning for individuals. In other words, if the four pillars of lifelong learning are to be constructed, it is important for education policies to integrate all of the opportunities that hinge around these three dimensions of education. Statistics on education around the world show that many African countries are struggling to do this as they are heavily influenced by the predominance of the school education

model. To paraphrase Guy Vincent, one might say that education is still a “prisoner of the school model” (Vincent, 1994) and that if we are to adopt the approach suggested by Coombs, studies and research must be carried out in each country so that an inventory of existing education opportunities can be compiled and education reforms can be implemented in a cohesive manner.

It is this step that we are taking here by considering the example of Benin, a French-speaking country in sub-Saharan Africa. We shall begin by analysing the education reforms implemented in this country since it gained independence in 1960, to highlight the difficulties to be taken into account with regard to education structures other than the school system. We shall then rely on a study of the current functioning of education and the views of those who address education needs and the structures capable of meeting them, so as to demonstrate that only combined efforts made by both non-formal education structures and structures within the school system can meet the diverse demands for education that exist in the country. Finally, an example of cohesive coordination (creation of formal bridges) between formal education and non-formal education will be proposed.

### Education reforms in Benin since 1960: real difficulties in the integration of non-formal education

Table 1 below, which is based on the public policy analysis grid proposed by Pierre Muller (1995), presents the reforms implemented in Benin since it gained independence. As in the grid, these reforms are presented from four perspectives:

- the “values” underpinning them, i.e. the motivating educational ideal or the nature of the positive change envisaged; that which is perceived as the desirable outcome to be achieved (e.g., guaranteeing access for all to high-quality education while ensuring equality between the sexes);
- the “standards” or “principles for action” on which the reform is based, taking the form of organisational arrangements and the allocation of roles, power and funding;
- the “algorithms” through which the hypotheses based on the requirements for the success of the formula are formulated, and which translate the cause-to-effect relationships between the values and standards (e.g., “if we want to reduce the gaps in terms of access to education between women and men, we must adopt positive discrimination favouring the former”);
- and finally, the “images” that the reform conjures up and which sum up the social concepts with which the public policy is associated (in this case, we shall consider primarily the image of the ideal man).

**Table 1 Overview of education reforms in Benin since 1960**

	Values	Standards (system of reference)	Algorithms (expected transformations)	Images (of the ideal man)
1960–1972	<i>Assertion, Sovereignty</i>	Preservation of colonial model Elitism for self- assertion and self-development	French model will have the same effects as environment of origin (Coombs, 1989)	Myth of the “White collar” (bureaucrat)
1972–1990	<i>Emancipation Cultural identity (socialism)</i>	New School = Unit of production National languages, adult literacy	Liberate from foreign domination and cultural alienation (Education Act)	<i>Educated proletarian (Self-taught individual)</i>
1990–2006	<i>Democracy (freedom, autonomy)</i>	Neo-colonial school revisited School of “excellence”	Train for self-employment (Convention on Education)	<i>Citizen entrepreneur</i>
2006 onwards	<i>Emergence (productivity, solidarity)</i>	Holistic approach Formal education/ non-formal education	EFA to strengthen human capital	Autonomous citizen, producer

If we look at this table, we find a paradox between the values that underpin the reforms and express the need to assert national sovereignty and cultural identity on the one hand and, on the other hand, the standards for the application of the reforms, which set little store by endogenous education systems, knowledge and cultures and instead favour the school model inherited from the colonial era. The first real reform of education, known as “Ecole Nouvelle” (New School), was implemented during the revolutionary period (1972–1990), and its essential values were emancipation and the assertion of national cultural identity. Schools had to adapt to society and contribute to the generation of wealth to bring about endogenous development, hence the slogans: “New School = Unit of production” and “Let us rely first and foremost on our own efforts and our own resources”. The goal of this reform, which was set forth in the law that established “New Schools”, was to “create a new type of citizen of Benin who is politically aware, technically valid and capable of productive work, and thus able to transform his environment by relying above all on his own efforts” (Ministry of National Education, 1979). In practice, this translated into a certain number of measures that included:

- the establishment of school-based production through agricultural activities, cultural handicrafts or sport;
- the promotion of vocational training that better addressed the realities of the labour market, at both secondary and university level;
- interest being shown in national languages through the creation of *Centres d'Éveil et de Stimulation de l'Enfance* (CESEs) [Centres for the Awakening and Stimulation of Children] so that pre-school education in national languages could be provided, and also through the implementation of a large-scale mass adult literacy programme for national languages.

This reform made it possible to give pupils a role in the running of schools and productive activities and also to attach importance to non-formal education (literacy and adult education), but it was rejected without being properly evaluated when the socialist regime fell. In actual fact, the data in the table indicate that in Benin, education has been seeking to acquire an identity from two exogenous models: the colonial model, which was inherited and reproduced in a fruitless attempt at reappropriation following independence, and that of the New School, which was inspired by socialist countries (former USSR and GDR, Cuba and so on) and adopted between 1972 and 1990 against the background of an inadequate post-colonial education system. In 1990, with the advent of democracy, it was the post-colonial model that would be “revisited”, without proper evaluation of the New School making it possible to preserve its positive aspects – in particular, the importance attached to non-formal education and endogenous cultural elements – so as to build an original model adapted to the realities facing the country.

The guidelines laid down from 2006 onwards were aimed at taking these realities into account by considering both formal education and non-formal education. Following the regime change that occurred in 2006, the *Forum national sur l'éducation* [National Education Forum] that was held in February 2007 laid down guidelines encouraging a holistic approach to education, through which literacy training and non-formal education were regarded as components in their own right. The goal was, among other things, to train “a new type of citizen impregnated with languages and cultures belonging to Benin but also having a good command of foreign languages, which will give him a window onto the world and enable him to master the most high-performance technologies, as well as information and communication technologies” (Actes du Forum National sur le Secteur de l'Éducation, p. 53). It was within this context that the Forum opted to introduce national languages into the school system and promote vocational training adapted to the national context.

However, in their implementation these guidelines have been subject to the strategies of actors and the imperatives of policy negotiations. Following the institutional incorporation of literacy and non-formal education within

the education sector, which culminated in the creation of a Ministry for Literacy and Promotion of National Languages (Ministère de l'Alphabétisation et de la Promotion des Langues Nationales) in 2007, this sub-sector was once again incorporated within the domain of culture in 2008, compromising the stated desire for a holistic approach towards education. Since then, education has been split between four segmented ministries, including that of literacy. As a result, adult education, with a budget of approximately 1% of that granted by technical and financial partners in support of the Ten-Year Education Sector Development Plan (Fast Track Initiative Fund), is once again being neglected. Furthermore, the inclusion of literacy and adult education within the culture sector has led to a perception of national languages less as vehicles of basic, social and endogenous knowledge than as a means of asserting national cultural identity. All this has prevented non-formal education from playing the important role attributed to it by the National Education Forum.

*The need for synergy between formal education and non-formal education structures with a view to meeting diversified demand for education*

A survey carried out on actors in the field of education in Benin highlighted their perceptions of educational needs as they are manifested in their environment and also the ways in which they can be met. The survey, which was supplemented with documentary investigations and empirical observations, led to the proposal in Table 2 (below) of the following as the actual situation of education in Benin (cf. Baba-Moussa, 2002, 2003).

This table shows the efforts of a certain number of non-formal education structures working alongside the school and university system (formal education) to satisfy educational needs as identified by education actors, with each structure working with specific populations in specific ways to make a particular educational response. This table highlights two things in particular. The first is the large number of ministries involved and the degree of control that they have over the structures (for instance, while the school system is under the control of the ministries responsible for education, the Ministry of Crafts has little control over the activities of learning workshops – a legacy of tradition). The second is the need to create synergy between the work of all of these structures if one really wishes to meet all of the needs identified; the school and university system, which is chief among academic establishments, cannot meet all needs single-handedly.

It may be deduced from these observations that the form that education actually takes in Benin is not so much that of a “system”, which is generally defined as a combination of interdependent components that converge towards the achievement of a single goal (Lemoigne, 1977), but rather that of a “context for action” reminiscent of a “more diffuse and unintentional form of collective action” (Friedberg, 1993, p. 144). In fact, it is not a system

**Table 2: Features and contributions of formal and non-formal education systems in Benin**

System	Ministry	Target populations	Contribution to education development
<i>School and university system</i>	Ministries responsible for the various forms of education	<ul style="list-style-type: none"> <li>– 4 to 25 years</li> <li>– those enrolled in schools</li> <li>– mainly urban</li> </ul>	<ul style="list-style-type: none"> <li>– academic and practical training</li> <li>– integration into modern culture</li> </ul>
<i>Learning workshops</i>	Ministry of Crafts (relative control over the sector)	<ul style="list-style-type: none"> <li>– 8 to 30 years</li> <li>– those who dropped out of school or did not enrol, urban and rural</li> </ul>	<ul style="list-style-type: none"> <li>– Practical training</li> <li>– Integration into local culture</li> <li>– Integration into informal employment</li> </ul>
<i>Youth organisations</i>	Ministry for Young People (delegates authority to actors)	<ul style="list-style-type: none"> <li>– often no age limit</li> <li>– all social backgrounds</li> </ul>	<ul style="list-style-type: none"> <li>– Academic and practical training</li> <li>– Integration into formal and informal employment</li> <li>– Integration into local and modern culture</li> <li>– Local development activities</li> </ul>
<i>Literacy centres</i>	Ministry of Culture	<ul style="list-style-type: none"> <li>– 20 years and over</li> <li>– those who did not enrol at school or dropped out</li> <li>– often rural</li> </ul>	<ul style="list-style-type: none"> <li>– “Academic” training with a vocational slant</li> <li>– Integration into local culture</li> <li>– Local development activity</li> </ul>
<i>Agricultural cooperatives</i>	Ministry of Rural Development	<ul style="list-style-type: none"> <li>– 12 to 30 years,</li> <li>– those who did not enrol at school or dropped out</li> <li>– mainly rural</li> </ul>	<ul style="list-style-type: none"> <li>– Practical training</li> <li>– Integration into informal and mixed employment</li> <li>– Integration into local environment</li> <li>– Local development activities</li> </ul>

but rather a group of systems (or structures) and actors that do not necessarily work together but contribute to a single goal: that of meeting the educational needs expressed by the actors in the national context of Benin. The “context of educational action” thus refers to all of the formal and non-formal education mechanisms that contribute, whether in a concerted fashion or not, to meeting the educational needs that are defined according to development needs in each national context. This is to be identified in ways specific to each country, on the basis of empirical and systematic research. Comparison of national case studies could, however, make it possible – if need be – to devise a model at regional level (e.g., sub-

Saharan Africa) by identifying a certain number of constants. The latter could lay the foundations for the emergence of an original education system adapted to the realities and identities of African countries.

Example of the creation of formal bridges between the school system, crafts training and literacy training conducted in national languages

There is, however, no point in identifying the context for action in the field of education unless this makes it possible to achieve synergy between the efforts of the constituent mechanisms, by identifying the actors, their goals, the action taken by them, and the outcomes obtained. This step has yet to be taken in Benin. A dual learning system (combining practical workshop-based training and theory-based training in the classroom) is currently being established to improve the quality of vocational training, but it is still selective and in the thrall of the “school model” (Flénon and Baba-Moussa, 2009, p. 16). However, certain voluntary-sector initiatives aimed at creating bridges between formal education and non-formal education could offer inspiration to the sector-specific ministries. The figure below shows an example of coordination between literacy and workshop-based crafts training in the non-formal education sector, and technical and vocational

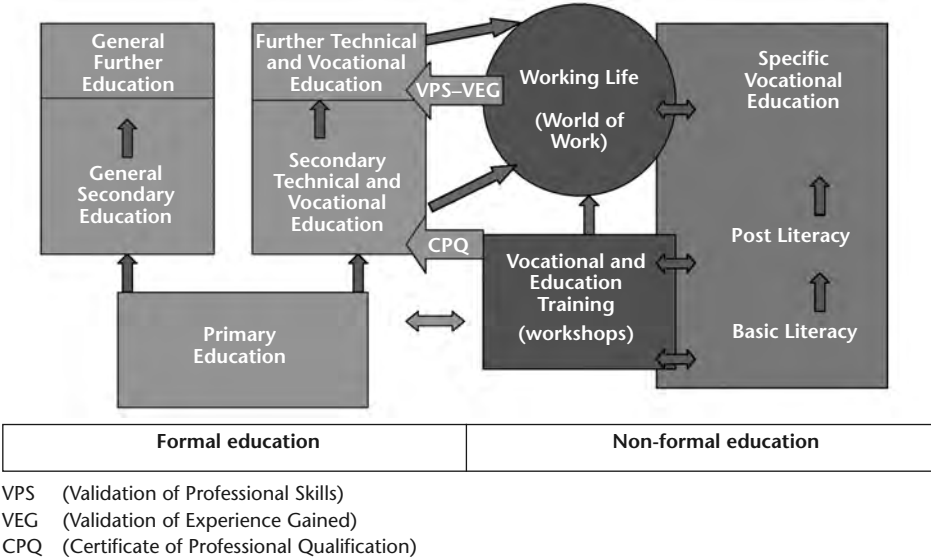


Figure 1 Example of bridge between formal education and non-formal education



training in the formal education sector.

The programme envisaged by one international NGO operating in the north of the country involves enabling neo-literates (people who have received initial literacy training in national languages: writing, reading, written arithmetic and basic social skills) to learn a trade on the job while following a post-literacy programme geared in particular towards the study of French. This enables them to obtain a *Certificat de Qualification au Métier* (CQM, Certificate of Professional Qualification) attesting to a certain level of ability in a profession (crafts, agriculture and so on) and a knowledge of French sufficient to enable them either to take a job or to obtain permission to enrol for and pursue a course of study in the field of technical and vocational education (formal education). Such a system would function best if, for example, holders of CQMs who were working and at the same time receiving special technical training delivered by the ministry responsible for literacy and adult education and linked to the profession pursued could benefit from a *Validation des acquis professionnels* (VAP, Validation of Professional Skills) or *Validation d'acquis de l'expérience* (VAE, Validation of Experience Gained) enabling them to enrol in technical or vocational training at a higher level and/or obtain a certificate documenting what they have learned (cf. Baba-Moussa, 2004).

Such a system would be entirely in keeping with an holistic approach to education and would contribute to UNESCO's reflection on basic education in Africa (cf. Kigali Call for Action of 2008). Its implementation would, however, necessitate cooperation between the relevant ministries: the Ministry of Technical and Vocational Education, the Ministry of Literacy and Adult Education and the Ministry of Crafts. Such cooperation will be hindered by the segmented functioning of these ministries and the leadership conflicts that may arise as a result, hence the need for voluntary action on the part of political decision-makers at the highest level to create an adequate interdepartmental framework to ensure that the context of educational action is functional.

## Conclusion

Many actors are now highlighting the inadequacy of education systems in the light of the realities faced by African countries and the fact that it is difficult for reforms to produce adapted responses (Baba-Moussa, 2006). Non-formal education is often cited as a component of the process of education and lifelong learning, but while an increasing amount of interest is being shown, there is still some resistance in Africa, in particular with regard to the importance of literacy and adult education in national languages. The sixth International Conference on Adult Education (CONFINTEA VI, Belém, December 2009) proposed a transition from

rhetoric to action. In this regard, public authorities sometimes struggle to innovate – as in the case of Benin – but I feel that an alternative lies in the complementary work of civil-society organisations, which can act as a catalyst. The mechanism presented by way of example offers a real opportunity to forge a link between formal education and non-formal education, and could encourage cooperation between the ministries concerned. Other initiatives of this kind could necessitate other forms of interdepartmental cooperation necessary for a truly holistic approach to education. In other words, this holistic approach towards education calls for a paradigm shift in the implementation of curricular reforms. The concept of the “context of educational action” as it is presented here should make it possible, eventually, to bridge the gaps between the sector-specific ministries and remove the barriers between the different components of education (nursery and primary education, general secondary education, higher education and research, technical and vocational training, literacy and adult education, etc.) so that a global view can be taken of the interaction between the measures undertaken within one of the sectors or the effects of one component on the others. This will require genuine political will accompanied by equitable allocation and management of resources, as well as adequate training and capacity-building for the intervening actors within the various domains of education: formal, non-formal and informal.

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# 12 Promoting the quality of adult non-formal education and lifelong learning in Tanzania: policy, practice, challenges and prospects

Salum R. Mnjagila<sup>1</sup>

## Background

Governments in all countries, both developed and developing alike, strive to provide education to their citizens with the understanding that education is essential, not only for economic growth, but also for social stability and freedom. The first function of adult, non-formal education and lifelong learning is to inspire both the desire for change, and the understanding that change is possible.

The most outstanding question we can have inside and outside the field is what and how in terms of its policy, practice, existing challenges, the quality of adult, non-formal and lifelong learning can be improved to bring anticipated development changes? To deal with this question, this paper tries to provide answers to four sub-questions:

- What is the terminological and conceptual understanding of the terms used in this paper?
- What is the importance and policy context in which adult education and lifelong learning programmes are being developed?
- What is the current status of the implementation of adult and lifelong learning in Tanzania?
- What are the major challenges and which steps are being taken to address them?

## Terminological and conceptual understanding of adult education, non-formal education and lifelong learning

It is necessary to clarify a few key terms and concepts used in this paper. The terms which need terminological and conceptual understanding include:

adult education; non-formal education; lifelong learning and literacy. These terms have distinct characteristics and are not equivalent, although they overlap and have a high degree of interaction. The challenge is that they are always defined interchangeably (Mushi and Bhalalusesa, 2002).

**Adult education** is a broad field that includes basic (foundation or essential education) and continuing education, vocational and technical education, higher education and professional development and is offered through formal, non-formal and informal education means and by a variety of actors-the state, civil society organisations and the market.

**Non-formal education** (NFE) is the alternative for those who lack the opportunity to acquire formal schooling for various reasons; it is an extension of formal schooling for those who need additional training for employment or to become self-employed. Some of its characteristics include the following. Its goal is for immediate application; its content is a diversified curriculum which is responsive to learner and environmental needs; its structure has flexible points of entry and exit, re-entry and re-exit and so on throughout the lifespan of an individual (flexibly structured and organised). Evaluation involves validation by the learner's experience of success; and delivery is environmentally-based, community-related, learner-centred and resource-serving. In Tanzania, NFE currently applies to children, not only to youth and adults.

**Literacy** is the meaningful acquisition, development and use of the written language. It goes beyond basic literacy. It is an ageless concept and process, and is thus not related only with (illiterate) adults and with out-of-school/ Non-formal education, but also with children and youth in formal schooling. Literacy is a basic learning need that comprises knowledge, information skills like computer skills, values and attitudes necessary for personal, family and community awareness and development.

**Lifelong learning**, which is often associated with adults, refers, in fact, to a comprehensive and visionary concept which includes formal, non-formal and informal learning which extend throughout the lifespan of an individual to attain the fullest possible development in personal, social and vocational and professional life. It views education in its totality, and includes learning that occurs in a home, school, community, and workplace, and through mass media and other situations and structures for acquiring and enhancing knowledge, skills, and attitudes. It is a key organising principle for education and training systems, and for the building of the knowledge society of the 21st Century. Lifelong learning acknowledges two inter-related facts: that learning is lifelong (not confined to particular a period of life) and that learning is life-wide (not confined to school and schooling). Lifelong learning means enabling people to learn at different times and is extended beyond formal education.

## Adult and lifelong learning: its importance and policy context

### *Importance of adult education and lifelong learning*

In his speech during the World Assembly of ICAE in Dar-es-Salaam in 1976, Nyerere said, “But there is a saying that nothing which is easy is worth doing, and it could never be said that adult education is not worth doing! For it is the key to the development of free men and free societies. Its function is to help men to think for themselves, to make their own decisions, and to execute these decisions for themselves” (Hinzen, 2006, p.70). Nyerere conceived adult education as having a liberating function of arousing popular consciousness for change and providing a framework through which constraints to development, such as poverty, ignorance, disease, oppression and exploitation could be transformed. Throughout his life he emphasised the importance of giving priority to education for equipping adults with skills required in life. Nyerere knew that when the majority of the population is illiterate, the socio-economic aims and ambitions of the nation cannot be met.

It goes without saying that, there is a link between high levels of quality adult and lifelong learning and development opportunities. Development opportunities for those without literacy skills are increasingly more difficult. The link between low literacy and unemployment, poor health, poverty and crime is also well understood. There is a growing realisation that individuals with lower literacy have poor health and are often disadvantaged in the health system. Low levels of literacy also limit their opportunities to think for themselves, manage and use the available resources, and exert control over their lives.

A person with education, even if he/she has acquired only adult basic education, can have a tremendous contribution in ensuring that human rights signed and ratified by the government are not violated by both the state and individuals. In his paper on the state of human rights in Tanzania, Professor Chris Maina of the Faculty of Laws of the University of Dar-es-Salaam pointed out that education in human rights has a big role to play with regard to fighting all levels of violation of human rights in Tanzania.

## The policy context of adult education and lifelong learning development in Tanzania

Tanzania is a country with a long history of effort in achieving goals to eradicate illiteracy through Mass Education Campaigns. In the 1970s, three major adult education programmes were established: Functional Literacy, Post-Literacy (Old and New Curriculum) and Literacy Supporting Programme (Radio, Film, Rural Newspapers, Ward Libraries, Worker's Education and Folk Development Colleges Programmes). In the same period, the Gov-

ernment of Tanzania implemented the Universal Primary Education Program. Through the implementation of these programmes, Tanzania was able to attain very successful results in terms of increasing enrolments and literacy rates. The Literacy Rates and Primary School Enrolment Rates, which were only 31% and 35.1% respectively in 1970, were increased to 90.6% and 98% in the mid- 1990s.

The overall framework governing delivery of adult and lifelong learning in Tanzania, especially after 1995, is provided by the Education and Training Policy (ETP, 1995) (MoEVT, 2008). The major thrust is in the areas of increasing enrolments, quality improvements, equitable access and utilisation of available resources. The policy provides for a creation of a true partnership between the state and other education providers by encouraging them to establish and manage schools, adult education centres and other training institutions. The adult and lifelong learning programmes are being developed within the framework of the Education Sector Development Programme (ESDP) developed in 1997 and aims to complement other sub-sector programmes, such as the Primary Education Development Programme (PEDP) and the Secondary Education Development Programme (SEDP).

The Tanzania Development Vision aims for a high-quality livelihood for all Tanzanians through the realisation of universal primary education, the eradication of illiteracy and the attainment of a significant level of tertiary education and training with high-quality human resources required to effectively respond to developmental challenges at all levels.

The National Strategy for Growth and Reduction of Poverty (NSGRP) focuses on reducing income disparity and to improve capacity for survival and well-being. The NSRGP targets the achievement of literacy for at least 80% of adults, especially women in rural areas by 2015. This entails strategies being put in place to reduce the current illiteracy rate by half and to clear the backlog of out-of-school children and youth by 2015.

Tanzania is also committed to international agreements and declarations. These include the Dakar Education for All Framework for Action, the Millennium Development Goals, the United Nations Literacy Decade, the United Nations Decade for Sustainable Development and the previous CONFITEA resolutions.

The development of adult education and lifelong learning programmes in Tanzania takes cognisance of these commitments and the crucial role that adult education and lifelong learning have for socio-economic development of Tanzania and aims to push forward the political momentum and commitment to move from rhetoric to action.

### *Current achievements*

The government started implementing a five year Adult and Non-formal Education Strategy (ANFES, 2003/04–2007/08) with the overall objective of ensuring, in partnership with civil society, that out-of-school children, youth

and adults have access to quality basic learning opportunities, with a view to improving literacy levels by 20%, clearing the backlog of out-of-school children and thus contributing to the creation of a lifelong society, the improvement of people's livelihood and an increased awareness and prevention of HIV and AIDS. Three major programmes – the Integrated Community Based Adult Education ICBAE), Complementary Basic Education in Tanzania (COBET) and Open and Distance Learning (ODL) – are being implemented within the framework of the ANFES. The achievements of adult education and lifelong learning can be assessed within ANFES's components: Access and Equity; Quality improvement; Capacity Enhancement and Development; Post-Literacy and Continuing Education; and Financing and Sustainability.

### *Access and equity*

The issues addressed are enrolment targets (undertake public campaigns to sensitise communities) to increase enrolment in adult education and lifelong learning centres; enroll 617,131 out-of-school children and youth aged 11-18 years old in COBET centres, most of whom are disadvantaged children and orphans, 3.8 million adults in adult education centres and 10,000 students in ODL centres; and maximise the use of school facilities).

There was a marked increase in the enrolment of out-of-school children and youth and adult learners in COBET and ICBAE centres in Tanzania in the period between 2004 and 2008. The significant increase in enrolment rates is a result of extensive community sensitisation programmes based on communities' own concept of strengthening both formal and non-formal education. Total enrolment in COBET centres increased from 78,060 learners in 2004 to 109,470 in 2008 (increased 40%) and in ICBAE from 260,000 to 1,102,173 (increased 324%) learners over the same period.

The target for ICBAE in 2008 was 1,288,664 (594,380 males and 694,684 females). However, only 1,102,173 learners (594,380 males and 507,793 females) were enrolled. The gap reflects a decrease in financial support from PEDP, resulting in a shortage of materials and limited funds for facilitators' honoraria.

**Table 1 Learners' Enrolment in COBET and ICBAE**

S/N	Programme	Enrolment (2004)			Enrolment (2008)			±%
		Boys/ Men	Girls/ Women	Total	Boys/ Men	Girls/ Women	Total	
1	COBET	35,850	42,210	78,060	61,898	47,572	109,470	40
2	ICBAE	158,706	101,294	260,000	594,380	507,793	1,102,173	324
	<b>TOTAL</b>	<b>194,556</b>	<b>143,504</b>	<b>338,060</b>	<b>656,278</b>	<b>555,365</b>	<b>1,211,643</b>	<b>258</b>



### *Quality improvement*

Adult education and lifelong learning provision is enhanced by availability of relevant curricula (which is based on the learning needs of the beneficiaries), adequate teaching resources and competent facilitators. In five years, 2004–2008, the government in collaboration with local government authorities and civil society organisations reviewed and revised the curriculum, incorporating it with cross-cutting issues: environment; human rights, gender and HIV and AIDS. Syllabus and guidelines, textbooks (communication skills, general knowledge, personality development, vocational skills and mathematics) for COBET Cohort I and II have been developed, printed and are being used in the centres. Facilitators' Guidelines for ICBAE (health, socio-politics, book-keeping and agriculture) were developed and are in use in the centres. Modules for Open and Distance Learning were also developed and printed. A total of 35,000 and 13,820 ICBAE and COBET professional and para-professional facilitators respectively have been trained.

Significant achievements have also been realised in the performance of learners in the COBET programme. In 2007, for instance, a total of 47,670 students (female 26,838 and male 20,832) Cohort I COBET learners sat the Standard IV examination and 34,867 (male 21,047, female 13,820) passed and were mainstreamed into formal primary education. In the same year, a total of 7,290 (male 4,432, female 2,858) Cohort II COBET learners sat for Standard VII and 2,363 (male 1,601, female 762) passed and were selected to join Form I.

Two major initiatives to develop a curriculum framework and national qualifications framework for adult education/non-formal education, harmonised with VETA and FDCs' short course delivery, have been integrated into the One UN Joint Programme (JP) for Education (2009-2010); 15 teachers were sponsored to pursue diploma courses in adult education; a situational analysis of the provision of technical education was conducted in post-literacy centres; and the Adult Education Press (Ministry Headquarters) and the National Literacy Centre offices in Mwanza were rehabilitated.

The Ministry is also collaborating with national and international NGOs in ensuring that the learners are motivated to learn and has a positive impact on them. The Radio Instruction to Strengthen Education collaborates with our ministry in delivering education of good quality through radio, MP3 and MP4. The Seidel Foundation is working with the Ministry in providing civics education linked to income-generating projects and small-scale credit schemes.

### *Capacity enhancement and development and monitoring*

The quality of adult education and lifelong learning cannot be achieved without a well-established management and administrative system. In 2007, a number of capacity-building initiatives were carried out. These initiatives were aimed at enhancing the development of adult education and lifelong

learning, and evaluating relevance, impact and sustainability of the teaching-learning processes and outcomes – not just focusing on the efficiency and the effectiveness of the managerial system (URT, 2003). After the approval of the ANFES, efforts were made to strengthen and improve the adult education and lifelong learning sub-sector system of data collection, processing and dissemination to produce reliable data that enhance accountability, transparency, planning and budgeting.

The initiatives taken to enhance capacity and monitoring were: the training of 36 officers from local government authorities (Temeke, Ilala, Rombo, Mbulu, Kondoa, Shinyanga Municipal, Shinyanga Rural, Kigoma Rural, Makete, Mvomero, Sumbawanga and Mtwara Mikindani) on the Lifelong Learning Management Information System (LL-MIS) Pilot Project. The training included the design and implementation of LL-MIS development plans, undertaking diagnostic studies and analysing reports; as well as designing and using LL-MIS indicators. In addition, a total of 252 adult education coordinators and audio-visual officers were introduced to recent initiatives to strengthen AE/NFE in Tanzania. In addition, 56 COBET facilitators were trained in Mwanza City and Bukoba district council; and 36 school inspectors were trained in quality assurance in the implementation of COBET. Thirty-six facilitators were trained as trainers on diagnostic teaching in 10 councils, namely Temeke, Mvomero, Morogoro Rural, Iringa Rural, Songea Rural, Sumbawanga Rural, Dodoma Municipal, Bagamoyo, Hai and Igunga.

In order to operationalise the Education Sector Management Information System (ESMIS), and in the process of formulating an adult education and lifelong learning qualification framework, a Lifelong Learning Technical Team (LLTT), coordinated by the AE/NFE Division, has been established to implement ESMIS and the One UN Joint Programme for education activities. The LLTT is institutionalised within the ESMIS National Technical Team, which reports through the ESMIS Sub-Committee under the Quality Technical Working Group.

The Ministry has been developing indicators to have information base for the adult education and lifelong learning sub-sector. Six key stakeholder institutions (AE/NFE Division, Vocational Education and Training Authority; VETA, Folk Development Colleges; FDCs, Institute of Adult Education; IAE, Education Management Information System Unit; EMIS Unit and Tanzania Education Network/Mtandao wa Elimu; TENMET) have already drafted a strategic framework for lifelong learning, to synergise ICBAE and COBET with non-formal vocational training and short courses provided by Folk Development Colleges. Other activities which have been implemented within the framework of the LL-MIS pilot project and ESMIS include: the development of a conceptual framework for lifelong learning (provided by AE/NFE Division, VETA, FDCs and CSOs), which delineates parameters for this important domain within MKUKUTA and ESDP; an orientation in the

scope and potential of the LL-MIS at national level; carrying out diagnostic studies in 12 pilot districts to identify district-specific information needs and to fine-tune the conceptual framework in line with local realities; and the development of a list of indicators for LL-MIS, with a particular focus on measuring progress towards achieving ICBAE/COBET targets.

A diagnostic study was conducted in four regions (Mwanza, Ruvuma, Dodoma, Dar-es Salaam) in preparation for the 'Yes I can!' Adult Literacy Development Project, a pilot project initiated in six districts of Ilemela (Mwanza), Songea Urban (Ruvuma), Dodoma Municipal (Dodoma), Temeke, Kinondoni and Ilala (Der es Salaam), which resulted in a status report on adult and non-formal provision in these regions. Sensitisation on the project was also done in the pilot districts. Four regions in the Lake Zone (Mwanza, Shinyanga, Mara, Kagera) were covered by a Human Rights Education (HRE) Strategic Plan, to be implemented by AE/NFE providers in the Lake Zone.

### *Institutional arrangement*

Good governance is the key to development of adult education and lifelong learning, economic growth and reduction of poverty. In practising decentralisation by devolution (or D by D), functional responsibilities and resources (finance, equipment and people) have been transferred from the central government sphere to the local government authorities which extend to the village level (in district authorities) and street level (in urban authorities). At the district level, adult education and lifelong learning programmes are coordinated by the District Adult Education Officer who is assisted by four Coordinators in the areas of audio-visual, home economics, technical education and agriculture. Ward Education Co-ordinators and Headteachers coordinate adult education and lifelong learning programmes at the ward and village levels.

The implementation of the ICBAE and COBET programmes took advantage of existing institutional set-ups to ensure efficient and effective implementation of the activities earmarked in the programme. Roles and responsibilities at the centre, village, ward, district, regional and national levels have been redefined to suit the objectives of the newly re-established Division of Adult and Non-Formal Education; that of overseeing the provision and development of adult and non-formal education in the country.

### *Adult education and lifelong learning assessment, learning outcomes and impact on socio-economic development*

Adult education and lifelong learning outcomes and impact on socio-economic development are measured by looking at the learners' ability to utilise practically what they have learned. Various ways can be used either by the facilitator or the adult learner himself/herself to make an assessment and determine the level of achievement. For Tanzania, the Application of acquired literacy skills is used to make a qualitative assessment. For example,

**Table 2 Observation schedule showing applicability of basic literacy skills**

Reading Skills	Writing Skills	Numeracy Skills
<ul style="list-style-type: none"> <li>• Ability to read               <ul style="list-style-type: none"> <li>– newspaper</li> <li>– books</li> <li>– periodicals</li> <li>– letters</li> <li>– invitation cards</li> </ul> </li> <li>• Access to bank forms and health cards</li> <li>• Interests in reading various documents eg. Quran and Bible</li> <li>• Habits of reading children's school texts and exercise books</li> <li>• Culture of reading</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to:               <ul style="list-style-type: none"> <li>fill in bank/credit forms</li> <li>write letters</li> </ul> </li> <li>• Keeping records of income and expenditure</li> <li>• Taking minutes of meetings eg. Class meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Making:               <ul style="list-style-type: none"> <li>– Simple accounts in business or projects</li> <li>– Simple calculations in selling and purchasing items at market places or shops.</li> <li>– Simple counting of items, things.</li> </ul> </li> </ul>

*Source: Review and Revision of Learning Assessment System/Tools for ICBAE programme Final Report, 2001*

through observations, interviews, discussions and informal meetings the facilitator or the evaluator makes an assessment of the impact of the acquired basic literacy skills in the day-to-day lives of the learners. This is done occasionally by using an Observation Schedule (Table 2) to check the use of reading, writing and numeracy (counting) skills.

The other means of assessment, which is external, is the Annual Sector Review. In the Education Sector Reviews, conducted annually since 2003, it has been shown that the ICBAE has enhanced the ability of learners to establish income-generating projects and credit schemes that are manageable and suitable to their environment. The projects include poultry-keeping, environment conservation, fish ponds, carpentry, piggyery, modern house-building, cattle keeping, masonry, bee-keeping and tailoring. Through the income they generate, young mothers and women especially have been able to increase their purchasing power and are able to meet other costs, such as buying uniforms, pens/pencils and exercise books for their children. Follow-up reports have shown that learners in ICBAE centres have also managed to improve nutrition, health, and hygiene and reduce malnutrition and child mortality rates.

It is worth noting that the ICBAE and its technique of facilitation of REFLECT methodology encourages learners' participation in making and effecting their decisions. Through this methodology, participants learn in a more democratic way, so that patience, tolerance, a culture of being assertive and confident has been promoted. In the process of learning, they discuss various issues which affect their community life. Some of these curriculum issues include gender, human rights, equity, poverty reduction, food security and availability, leadership style, land law and HIV and AIDS. There is also

a positive attitude among learners towards fulfilling their responsibilities willingly and towards providing support to community development programmes.

## Challenges and recommendations

The adult education and lifelong learning sub-sector has confronted a number of significant challenges. Some of these challenges remain unresolved, and some have informed future undertakings.

### *The absence of integrated policy and a comprehensive plan of action*

The Adult education and lifelong learning are developed within the framework of the Education and Training Policy of 1995, and in particular, chapter nine of this policy. By the time the ETP was developed, the emphasis was mainly put on functional literacy and very little on post-literacy and continuing education. Its main purpose was to complement the formal education system. It is sufficient to note that the public perception of adults as learners sees adult learning as simply the provision of basic literacy skills. The good ideas of lifelong learning were only theoretical, not practical as such. The current policy, though, rationalises the need for change. At the same time it acknowledges the use of outdated methodologies and is not clear on assessment and standards of performance, including evaluation of prior learning; responsibility for training; curriculum development; monitoring and evaluation of programmes. The responsibilities of the newly-established Division and its administrative and management structures are not clearly spelled out in the ETP.

The (LL-MIS) pilot study implemented in Tanzania, in collaboration with UNESCO since 2003, has shown that adults engage in a wide range of learning activities coordinated by a number of providers. There is great diversity in terms of content, methods, participants, levels and programmes including not only those of basic education, but also activities such as continuing education for qualifications by distance study, vocational training, extension programmes for rural development and listening to the radio. Adult learning takes place in the home, in the community and in the workplace as well as in education and training institutions. There is in fact, a wide diversity of learning opportunities available to adults, provided by ministries of the government, government and private institutions, non-governmental organisations, community-based organisations and churches. In this regard, Tanzania now, and not later, needs to formulate a policy and policy guidelines, out of which a national comprehensive plan of action will be developed to accommodate the needs of various providers and a new conceptual understanding of adult education and lifelong learning. The policy and the plan of action have to take into consideration that adult

education and lifelong learning encompass the entire range of formal, non-formal and informal learning activities undertaken by adults and out-of-school youth, which result in the acquisition of new knowledge, skills and attitudes to enhance the quality of life.

### *Limited access and equity*

Limited access of disadvantaged and marginalised groups (out-of-school children, illiterate youth and adults from poverty-stricken areas, orphans, children from mobile/ nomadic communities and children, youth and adults with disabilities) means that there is an estimated total of four million adults and 1.5 million children and youth still missing basic education. Despite the fact that adult education and lifelong learning have been included in Tanzania's National Strategy for Growth and Reduction of Poverty, and village, ward and district plans, the national education sector budget priority, has for quite a long time been primary and secondary education. Shortfall in funding has limited further progress and expansion of the existing programmes to reach the target groups. Therefore, it is recommended that there is a need for strengthening political will and public commitment to financing adult education and lifelong learning to improve access to equitable quality adult education and lifelong learning programmes.

### *Lack of awareness of the importance of adult education and lifelong learning*

The support which the government of Tanzania has been providing to adult education and lifelong learning programmes, both public and private, so far represents great a step forward in the implementation of national and international strategies regarding the role of education and learning. However, it is considered to statutory in character. Adult education and lifelong learning providers would appreciate a more active engagement on the part of the state, such as attendance of events taking place during the Adult Education and Education for All Weeks (first week of September and last week of April, respectively) at national and local levels, public appeals in the media, public statements by important government representatives, professionals and academics, financial and technical support according to the scope and quality of their participation in these two major events. Since more fields are directly or indirectly related to learning, it is recommended that all stakeholders are involved in these events to the raise their awareness of the importance, necessity and omnipresence of learning in and for personal development, family life, work and society at large. Spontaneously, the structure of EFA and adult education events can contribute to the strengthening the four pillars of learning: "Learning to know, learning to do, learning to live together, and learning to be".

### *Lack of transparency of the celebrations planning process*

At the core, the adult education and lifelong learning celebration weeks consist of activities staged by hundreds of learning providers in almost all regions and districts around the country. These activities include open days, visits to adult education and lifelong learning centres, awards nights, demonstrations and performances. They are supplemented by activities administered by the ministry and district authorities, such as award ceremonies, lunches with guest speakers and competitions. They make use of the media for advocating and promoting existing Adult education and lifelong learning weeks and outreach services in general. Our experience has shown that if the process is transparent and the stakeholders are involved from the beginning, they will have a chance to comment during the planning and implementation of the activities, not as outsiders but as owners. Due to the importance of these celebrations, it is recommended that the activities have to be transparent to all key providers, not only for their long-term survival but also to give community stakeholders an opportunity to see the behind-the-scenes workings of the campaign.

### *Shortage of qualified facilitators*

Since teaching adults is not a recognised career, very few qualified people volunteer. The few who do so leave as soon as the chance for a more permanent occupation occurs or, in case of women facilitators, when they get married to someone living in town or outside the area. The rate of turnover among adult education and lifelong learning facilitators in Tanzania is estimated to be 42%. The departure of the facilitator means the death of the centre. It must also be mentioned that because facilitators do not regard adult teaching as a career, they are not committed to the task, and absenteeism is very high. Facilitator absenteeism makes it difficult for learners to acquire knowledge and is often a source of frustration to them. It is worth noting that unqualified facilitators cannot effectively make use of practical and participatory methodologies and hence are unable to recognise and utilise the wealth of learners' previous knowledge and experience, perceptions and expectations to facilitate learning. This has been one of the reasons for low attendance in adult education and lifelong learning centres. What has also been observed, especially in ICBAE centres, is the increased establishment of income-generating projects and credit schemes. Most of the facilitators do not have the requisite capacity to inculcate reading, writing and arithmetic skills to the learners using techniques like REFLECT. Adult education and lifelong learning programmes require the involvement of both teacher and learners. Freire (1972) pointed out that the more people are actively involved in searching their issues, the deeper becomes their awareness of reality, and by spelling out the issues that are meaningful to them, they take control of them. Therefore, it is recommended that facilitators need initial and in-service training, to effectively carry out one of

their major roles of improving literacy skills of their learners.

*Shortage in supply of teaching and learning materials and equipment*

The available evidence indicates that adult education and lifelong learning centres are limited by the shortage of teaching and learning materials and equipment. There is limited financial ability within the LGAs to purchase enough materials for the implementation of adult education/non-formal education programmes and interventions, as well as limited transport facilities to follow-up adult education/non-formal education activities at the centre level. Hence, it is recommended that adult education and lifelong learning plans and budgets are mainstreamed into district plans and budgets to ensure that there is a supply of teaching and learning materials and equipment.

*Limited number of community-based resource centres/information centres*

Libraries and Information Centres were established to support literacy development in the country in the 1970s to serve the needs of adult learners and sustain their acquired literacy skills. In the age of global information exchange, libraries, especially those in rural areas, can benefit by exchange of information from partners at ward, district, regional, national levels.

Information and Communications Technologies (ICTs) have revolutionised information, communication and education and learning. Access to, and debate on computers and the internet has become a major issue in Tanzania in relation to children, youth and the school system. However, it remains for the most part a non-issue when they compared to poor (illiterate adult) learners. ICTs are being rapidly introduced for adult continuing and advanced education and training. Despite the efforts taken in Tanzania in establishing a "Yes I Can" Project using the methodology which is enhanced by the use of ICTs in six pilot districts, expansion will require political will and public commitment in terms of resource requirements.

However, the government seems to be very positive on the use of ICTs in adult education and lifelong learning centres, for the technologies offer solutions. When available, they offer new interactive modes of communication and open up an unprecedented but often overwhelming wealth of information. Therefore, there is a need in to re-establish and develop networks, libraries and resource centres to bridge the information gap, share resources and expertise and provide adult learners with access to a spectrum of knowledge that extends beyond geographical boundaries.

*Limited capacity to co-ordinate and monitor implementation of policy*

Adult education and lifelong learning in Tanzania, as explained earlier, are characterised by diversity in terms of content, methods, participants, levels, and providers. They are multi-sectoral, involving different ministries within



government, private sector, and non-governmental organisations and community-based organisations. The promotion of adult education and lifelong learning for all therefore poses a challenge of co-ordination, policy implementation and monitoring. To meet this challenge, the Government has, in July, re-established its Adult and Non-formal Education Division. However, for the Division to effectively play its roles and functions, it has been recommended that the National Adult and Lifelong Learning Council be re-established to promote and co-ordinate adult learning, policy development and implementation and the maintenance of standards in the provision of adult learning. In particular, among other duties, the Council will be to advise the Minister on the adult education and lifelong learning qualifications framework (registration, accreditation and mainstreaming), and targets, indicators and monitoring procedures with respect to equitable access to adult learning opportunities.

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# 13 A review of Mexico's lifelong learning model

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Mexico has a territorial extension of 2 million square kilometers, in which 103.3 million people live. It has three large cities (26% of the total population), 300 medium-sized cities (37% of the total population), and 175,000 little towns and villages (37% of the total population).

Of the total population in Mexico, there are 33.4 million adults (aged 15 years and over) without basic education. This means that 17.6 million have not completed the 9th Grade; 10 million have not completed the 6th Grade; and 5.9 million are illiterate.

Mexico is a country of cultural diversity. This is expressed through the presence of more than 62 ethnic groups, 68 linguistic associations and 364 linguistic variations, many of which are not able to communicate among each another. According to the XII Population and Housing Census 2000, these ethnic groups currently represent the 10% of the total population (7.6 million inhabitants), whereas the Population and Housing Count 2005 reported 6,011,202 speakers of a language (referred to as HLI) in the country. The difference among speakers of each language is evident: Nahuatl is spoken by 1,448,936 people (24% of the HLI total) whereas Aguateco is spoken by 23 people.

It is important to mention that even when these groups share the same world view and cultural features adopted during 300 years of colonisation, inside every ethnic group there are fundamental cultural and linguistic differences.

Mexico has a highly institutionalised literacy and basic education model that, for nearly three decades, has been operating through INEA, the National Institute for Adult Education that was founded in 1981 and is the decentralised Mexican governmental agency for youth and adult basic education.

INEA's services are flexible, based on open systems, unscheduled, on a modular basis and focused on "hard" topics for life and work. A learning

assessment system operates all over the country, supported by computers, and with a strong national database.

INEA has a normative, technical and political role, and controls 0.86% of the Education Ministry budget. It operates at national, state and local levels with the Model of Education for Lifelong Learning and Work Skills (MEVyT).

This model offers literacy, elementary and basic education that the public and private sectors are encouraged to use in youth and adult education in Mexico.

The MEVyT aims to offer basic education for youths and adults, linked to topics and learning options based on the interests and needs of communities, in order to develop the knowledge and competencies necessary to produce better living conditions in their personal, family and social lives.

In general terms, MEVyT is intended for people who want to:

- Recognise and integrate experiences and knowledge already developed;
- Enrich existing knowledge with new knowledge that is useful and significant for their development;
- Improve their capabilities to search and manage information to keep on learning;
- Strengthen their basic skills of reading, writing, oral expression and comprehension of their natural and social surrounding;
- Explain in their own words natural and social phenomena;
- Live in better conditions and to participate responsibly in democracy in their country;
- Strengthen skills, behaviours and values to improve and transform their life and community life in a legal framework of respect and responsibility to develop self-esteem; and
- Be creative, good students who are conscious and responsible in using decision-making procedures and methods.

The MEVyT is:

**Modular.** It is based on a modular learning structure of independent and comprehensive units built by topics, situations, problems, learning purposes and specific information intended for the target audience.

**Diversified.** It provides a variety of alternative topics intended for different sectors of the population, including situations and learning activities that incorporate different ways of understanding and allow learning in different contexts.

**Flexible and open.** The person decides which module to study and when to get it accredited, according to their own pace, schedule and possibilities.

**Updated.** It is developed, revised and improved continuously so that modules meet youth and adults' needs as well as advance trainers' professional development. It is possible to construct different versions of the modules.

**Comprehensive.** It develops skills in different areas of life, from individual to personal to community and wider society. It allows linking between different levels of basic education, the acquisition of learning tools and the development of basic competencies in communication, reasoning, problem-solving and involvement.

As part of the MEVyT comprehensive programme on basic education, continuing education has been facilitated in literacy and Elementary School, giving the possibility of entering High School to continue studying.

Through the initial level students apply reading and writing skills and perform basic calculations continuously and efficiently to reduce learning gaps, forgetting or misunderstanding.

Mexican illiteracy exists mainly in indigenous groups, where educational offerings differ significantly from the initial offering intended for Spanish speakers and groups who are literate in their home language who speak Spanish as a second language. For these groups, it is intended to apply reading and writing skills in both their home language and Spanish. This is to facilitate comprehension processes, common sense, expression and learning; and to understand and use Spanish language in everyday life situations.

Whatever the case, and for statistical reasons, in Mexico a person is considered literate when he/she completes the initial level of home language and bilingual skills.

The main purpose of study in Elementary School, Middle School and High School is to encourage learning, acquisition of knowledge and development of skills for lifelong learning and work among youth and adults. This will result in a more efficient performance of everyday tasks and the ability to keep learning continuously and individually through life, taking advantage of accreditation and certification of educational levels to continue in formal education.

Learning is achieved through modular study, which allows the person to learn and to develop learning skills, whether individually or in groups supported by tutors. They will guide students by offering them face-to-face tutorials until they achieve their learning goals and obtain a certificate of study.

## Types of modules

Basic modules cover basic needs and learning tools related to core subjects such as language and communication, mathematics, sciences and integrated natural and social sciences. Modules vary according to access, route and levels.

Diversified modules include specific topics on the interests and needs of different sectors of the population. Module content complies with subject curricula and aims to reinforce the development of basic skills. Topics may

be related to national, regional or state issues.

Training for work: the MEVyT allows learning acquired by students in training courses and lifelong learning to be recognised and quality-assured in educational institutions of excellence. Accreditation of such modules can contribute to an Elementary or Middle School certificate.

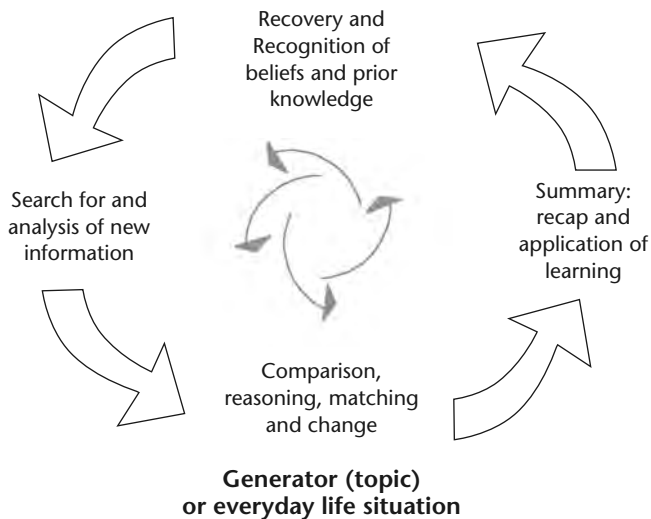
Online courses are free on the Web and are located on the INEA ([www.inea.gob.mx](http://www.inea.gob.mx)) and Conevyt ([www.conevyt.org.mx](http://www.conevyt.org.mx)) portals. These electronic versions have resulted in an educational and visual adaptation of printed modules for use as interactive resources, taking advantage of the benefits and computer technology to develop different skills. These resources can be managed by users without registering. Unfortunately, they can not be followed up or receive feedback because they do not warranty learning activities on computers.

The online MEVyT can be studied with the support of a remote tutor in INEA's Plazas Comunitarias but it does not show the complete offering, which has been integrated gradually.

Virtual MEVyT means free-access courses in the form of CDs, which can be studied in Plazas Comunitarias.

Basic MEVyT modules in Braille are intended for people who are short-sighted or have visual impairments, and have been adapted for audio and special features. This is a pilot project.

The MEVyT methodology uses learning situations based on everyday life or people, and focuses on transferring knowledge to other contexts in a positive way. Moreover, learning develops through interactive processes



**Figure 1 MEVyT methodology**

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between the student and course content, with the support of a trainer and through participating in study groups related to modules.

The MEVyT methodology generates students' thinking on the importance of a topic and fosters problem-solving. The topic is the core learning methodology, which differs from the traditional "class" that starts with a definition. In contrast the MEVyT is developed through a cycle in which four stages interact and are related to each other (see Figure 1).

## MEVyT Methodology

Assessment of learning is a continuous process carried out by the tutor and student. Self-evaluation and learning activities are developed gradually. Progress must be approved by the trainer and technical staff so that the student can take exams at the appropriate level. Because INEA is an open educational system, the assessment of learning is applied with the purpose of accreditation and certification.

## Indigenous bilingual block: MIB

Diversity among population sectors, especially among indigenous groups, has required INEA to develop educational offerings to meet specific and complex needs. Therefore, apart from the MEVyT in Spanish, there is the MIB (HLI, by its Spanish initials) intended for indigenous groups which can be accomplished by two routes: MIBI and MIBES. These address the educational offering towards HLI according to the learning level and Spanish-language skills of each student. Monolingual population skills differ significantly from bilingual population skills, which are also different from the Spanish-speaking population.

The two MEVyT bilingual routes are:

- The MIBI towards HLI, which represents a coordinated bilingual framework. This requires proficient expression in both Spanish and the home language.
- The Bilingual MEVyT with Spanish as a Second Language (MIBES, by its Spanish initials) must be applied to monolingual and indigenous language-speakers or populations who barely speak Spanish because it requires great effort and educational attention to learn Spanish and develop literacy skills.

In both of these MIB routes, the educational attention must be given by bilingual instructors from literacy to Middle School.

For intermediate and advanced levels (part of Elementary School and

Middle School) the following actions are developed:

An educational offering for that gives an intercultural bilingual treatment in content and educational materials (Guide) and structured by levels or stages.

MEVyT basic modules are used at these levels either without modification or tailored according to the culture and home language intended.

In some cases, glossaries are developed according to language criteria, to be translated into familiar words and expressions as the basis for educational materials, which are unique and built by language and ethnic groups themselves.

Tailoring is a process which implies: consideration of world view and culture pertaining to an ethnic group, topics, problems, activities, experiences and contents, pictures, recovery of communication situations, and so on.

Diversified modules are resorted to as an open educational offering, which is elective.

## Strategy

Particular attention has been given to the MIB vision and linguistic strategy, which is oriented to materials in different languages which are designed for use by all ethnic/language groups in every region. This approach suggests the need for analysis and a consensus on a standardised written language.

However, MIB educational modules have been built by bilingual technical teams who have good links to communities, and can reflect and respond to different interests, living conditions and linguistic specificities. These teams adapt activities, educational materials, training and academic follow-up accordingly.

One of the most important aspects of the model is that people are given an initial interview which provides information on their school background, reading and writing skills, monolingual and bilingual language skills. This step is essential because it indicates the most appropriate educational route for the learner.

It is essential that there are bilingual tutors who pertain to the ethnic group and speak the home language, in order to facilitate communication, deliver modules and facilitate relevant learning. In these contexts, it is also important that tutors and bilingual tutors receive instruction on how to deliver literacy, use materials and evaluate learning outcomes, as well as develop reading and writing skills.

## Operational conditions

There has been some progress in recognising equity issues as an important dimension in allocating resources for educational provision for indigenous populations.

The geographic dispersal of target populations requires more resource for the distribution of materials and organisation of educational provision.

Since 2005 there are been gradual improvements in the terms and conditions of volunteers working with indigenous groups, leading to increased programme productivity.

Cultural and linguistic diversity require resources for the production of contextualised educational materials, which make up the highest programme costs.

## Evaluation

In constructing and updating the Lifelong Learning and Work Skills Educational Model (MEVyT), the evaluation and interpretation of quality is based on the implementation of mechanisms and instruments to review the learning materials, operating modules and coaches' training materials.

For each case there is monitoring of the achievement of educational objectives, how youths and adults have learned, what they feel about their learning, the characteristics of their family relations and their families' behaviour, their opinion of materials and coaches' performance and organisation of the educational process.

Follow-up and evaluation of educational materials are understood from a wide curricular perspective, as a set of systematic activities that are part of the educational process. The educational model has a dynamic vision and works through the intervention of several actors, different factors and dimensions linked closely to its pedagogic features. Evaluations are made of the content and specific materials, the teaching process and performance of educators, the significance of learning in family life and social life, among other factors. Other mechanisms and strategies are acknowledged at different stages of curriculum design and development.

Evaluation of the general purposes of materials, modules and training contributes to decision-making on the continued improvement of quality and the performance of educational provision. It helps to consolidate the educational practice of tutors and institutional staff in strengthening the participation and development of youths and adults, as well as their understanding of the impact of learning on life.

Materials, module and training evaluation mechanisms are based on:

- pilot tests of recently-created educational materials;
- collegiate or academic workshops;



- meetings associated with staff training processes in institutional and operational fields; and
- statistical analysis of the model's evolution and performance.

The indicators used to evaluate educational material are:

- **Pertinence.** The ways in which the educational materials respond to users' needs and interests.
- **Relevance.** How meaningful the content and learning are for youths and adults in their life, family, work and social environment.
- **Functionality.** This relates to the organisation and presentation of materials, in terms of their accuracy, logic, format and handling; use of drawings and fonts; clarity of instructions, language and structure.
- **Didactic approach.** This considers the learning situations covered by the MEVyT. It involves management of content and how it is applied in set-up activities. It includes evaluation and feedback and establishes how they contribute to achieving educational goals.

## Challenges and lessons learned

There are financial constraints due to the large number of modules and other learning materials produced, as well as the high turnover of facilitators. Financial challenges are compounded by the fact that the programme is offered free of charge to learners and receives only limited funding.

The centralised distribution of learning materials has created artificial shortages of materials and reduced choices of study modules in some areas.

The training of the many facilitators coupled with a high turnover of trained facilitators due to low remuneration is a costly challenge for the programme. The high turnover of facilitators furthermore undermines learning consistency and thus the learners' pass rates.

There is a need to improve the ways in which the programme is monitored and evaluated to ensure that the stated goals are achieved. In particular, there is a need to constantly revise, update and upgrade learning materials to meet the learners' changing circumstances and needs, as well as the changing demands of the natural environment. In addition, further research, negotiation, political understanding, financial resources and suitably trained facilitators are needed in order to support the development of appropriate models and modules for indigenous populations.

Youth and adult literacy programmes are more successful if they satisfy the principal needs of the learners and their communities. This has been demonstrated in particular by the success of the regional modules, which appeal directly to the learners' social and geographical environments, as well as their unique circumstances and aspirations.

More resources must be invested in the training and payment of facilitators because the success of the programme depends, to a large extent, on their technical abilities and motivation.

## Conclusion

The MEVyT programme has successfully integrated basic literacy learning into a comprehensive system of non-formal education that encompasses life and work-related issues. The model has also succeeded in responding to the emergent and essential needs of people from different groups and regions and in ensuring that the learning process for indigenous peoples has its starting point in their mother languages and respect for their cultures.

## *Reference*

- 1 Mr Juan de Dios Castro is Director of the National Institute for Adult Education (INEA), Mexico.

# 14 Sharing innovative practices in financing lifelong learning in the Philippines

Ma Eloisa M Ramirez<sup>1</sup>

## Introduction

In the spirit of collaboration, the Southeast Asian Center for Lifelong Learning for Sustainable Development (SEA-CLLSD) in the Philippines, as a pro-active partner of UNESCO in the delivery of its programmes in the Southeast Asian sub-region – under the “delivering as one” concept, has applied for and has recently received recognition as a UNESCO Category 2 Center. As a Center for capacity-building, research and development, and advocacy for ESD in the Southeast Asian sub-region, the SEA-CLLSD hopes to contribute to the strengthening of UNESCO’s global leadership in the area of lifelong learning and ESD,

This paper will present innovative practices in financing lifelong learning for sustainable development (LLSD) initiatives undertaken by the service providers of the Philippine Category 2 Center.

## Educational context and challenges

### *Constitutional provisions for lifelong learning*

The 1987 Constitution of the Republic of the Philippines embodies the foundations for lifelong learning policies (Chan Robles and Associates, 1998). Article XIV, Section 1 provides that the State “shall protect and promote the right of all citizens to quality education at all levels and shall take appropriate steps to make education accessible to all.”

In addition, Section 2 states that the State should establish, maintain and support a complete, adequate and integrated system of education relevant to the needs of the people and society, as well as free public education in the elementary and high school levels. Without limiting the natural rights of parents to rear their children, elementary education is compulsory for all

children of school age. The State should also establish and maintain a system of scholarship grants, student loan programmes, subsidies, and other incentives which shall be available to deserving students in both public and private schools, especially to the under-privileged. It should encourage non-formal, informal, and indigenous learning systems, as well as self-learning, independent, and out-of-school study programmes, particularly those that respond to community needs; and it should provide adult citizens, the disabled and out-of-school youth with training in civics, vocational efficiency, and other skills.

Despite these Constitutional provisions, there is no explicit law that leads to a comprehensive policy towards lifelong learning, nor is there a unifying government agency or institution of coordinating policies and programmes on lifelong learning in the country. It is therefore the hope of the SEA-CLLSD to be the inter-agency coordinating body that will assist not only the Philippine government, but all the countries of the Southeast Asian sub-region in the formulation of lifelong learning and education for sustainable development strategies, programmes and policies.

### *Harmonising the trifocalised education system*

In the absence of a clear governing and administering structure for lifelong learning, policies and implementation strategies are disaggregated into the trifocalised education system (UNESCO National Commission of the Philippines, 2009a). The Education Act of 1982 created the Ministry of Education, Culture and Sports which later became the Department of Education, Culture and Sports (DECS) in 1987 by virtue of Executive Order No. 117.

The report of the Joint Congressional Commission on Education (EDCOM) provided the impetus for Congress to pass Republic Act 7722 and RA 7796 in 1994 creating the Commission on Higher Education (CHED) and the Technical Education and Skills Development Authority (TESDA). The trifocal education system refocused DECS' mandate to basic education which covers elementary, secondary and non-formal education, including culture and sports. TESDA administers the post-secondary, middle-level manpower training and development while CHED supervises tertiary degree programmes.

In August 2001 RA 9155, otherwise called the Governance of Basic Education Act, was passed, transforming the name of DECS to the Department of Education (DepEd) and redefining the role of field offices. The decentralisation of education into these three main government agencies brings forth diverse but incongruent components of a plausible policy framework on lifelong learning only in terms of their separate programmes – DepEd's Bureau of Elementary Education and Bureau of Secondary Education for Basic Education; the Bureau of Alternative Learning System's (BALS) functional literacy programmes; technical vocational education and training (TVET) of TESDA; and CHED's higher education.

In light of President Gloria Macapagal-Arroyo's goal to strengthen the role of education in accelerating national development and global competitive-

ness, Executive Order 652 was issued on 21 August 2007, creating the Presidential Task Force on Education (PTFE) to assess, plan and monitor the entire education system. It is chaired by Fr. Bienvenido Nebres from the private sector and composed of ten members, including the DepEd Secretary, CHED Chairman, TESDA Director-General, Professional Regulatory Commission (PRC) Chairman, Presidential Assistant for Education and four more members from the private sector.

The PTFE has adopted a vision that in every Filipino family, each child has the opportunity to get a high-quality education that leads to becoming a whole person, a successful entrepreneur and a productive and responsible citizen. This vision is the basis of the “Main Education Highway” framework, which is expected to turn out Filipinos who have the skills to work, who can manage their emotions, nurture relationships, solve problems and cope with change. A harmonised technical vocational and higher education system was recommended, together with the ghtening of linkages between higher education and PRC to meet the needs of industry, and more importantly, the synchronisation and harmonisation of the management, regulatory and coordination issues of these three education agencies.

### *Financing the educational system*

#### **Local and national government**

The national government contributes to the financial support of public educational institutions, particularly preschools, elementary, and national secondary schools, vocational and technical schools, as well as chartered and non-chartered higher educational institutions. Government educational institutions are allowed to receive grants, legacies and donations for purposes specified by law. The management and use of such income is subject to government accounting and auditing rules and regulations.

ECE is financed through a combination of public and private funds. The government supports ECE programmes through cost-sharing arrangements that involve LGUs and counterpart funds from the national government agencies for technical assistance and support. DepEd sustains the pre-school programmes in public schools in cooperation with the Parent-Teacher-Community Associations (PTCAs), where applicable, by providing teacher training, materials and equipment, including compensation for service providers.

The biggest source of funding for costs of public Basic Education is the national government, in the form of recurrent costs as administered by DepEd. Basic Education continues to be a top government priority, noting that the budget share of DepEd posted an average annual growth of 7.9% for the period 2004-2007 and has posted an average share of 85.8% of the entire budget for education. The national government financing for basic education has been supplemented by the local government at municipal, city and provincial level. Even as basic education is nominally free, private

households also contribute significantly to the other costs of public education like school supplies, travel, allowances, school uniforms, PTCA contributions and other incidental expenses for schooling. Private households' share in expenditures however, could not be fully accounted for.

Private providers of Technical Vocational Education and Training (TVET), which constitute 62% of the delivery system, have the responsibility to fund and carry out their respective programmes. The government supports the activities of the remaining 38%, which are the public sector training providers – comprised of TESDA, DepEd through vocational secondary schools, State Universities and Colleges (SUCs), higher education institutions and LGUs. A TESDA Development Fund was established under the 1994 TESDA Act, managed and administered by TESDA. The income from this is utilised exclusively in awarding grants and providing assistance to training institutions, industries, as well as LGUs for upgrading their capabilities and developing and implementing technical-vocational education and training programmes.

Higher education is also financed from public and private funds. Public financing covers the requirements of CHED to perform its mandate, the operations of the SUCs and the locally-funded programmes and projects. Private colleges and universities fund their own operations through capital investments, equity contributions, tuition fees and other school charges, grants, loans and other income sources.

Local government units (LGUs) are encouraged to assume responsibility over non-national public schools. Their participation, particularly in providing funding support is critical in achieving the basic education goals and targets. Republic Act No. 5447 includes the "Creation of Special Education Fund (SEF)", which established a fixed source of income (1% tax on the real property value) for the basic education sector through the LGU. RA 7160 (the Local Government Code of the Philippines) strengthened the provision of RA 5447 by instituting the involvement of the LGUs, especially in financing basic education. The LGC articulated the creation of Local School Boards (LSBs) that specifically manage the SEF in each locality and provided DepEd representation in the LGUs. The LSBs set the actual spending priorities for the SEF. Each LSB is co-chaired by the local chief executive (the provincial governor or the municipal/city) and the Division Superintendent (or District Supervisor). The other members of the LSB are the chairperson of the education committee of the local legislature, the local treasurer, the representative of the federation of local youth councils, the president of the local federation of PTCAs, a representative of the local teachers' organisation, and a representative of the non-academic personnel of public schools in the local jurisdiction.

The proceeds from the SEF are usually allocated to the operation and maintenance of public schools, the construction and repair of school buildings and facilities, purchase of equipment, education research, purchase

of books and periodicals, and sports development. In some areas, a sizeable amount of the LGU outlays have gone to teachers' salaries and other non-personnel inputs, especially for newly-established schools. In many divisions, public primary and secondary schools are dependent on SEF resources to augment their limited funds for operation and maintenance expenditures.

As part of the devolution of local infrastructure to LGUs under the LGC, responsibility for the construction and maintenance of public primary and secondary school buildings is now assigned principally to municipal and city governments. However, the central government through the Department of Public Works and Highways continues to be in charge of the construction supervision of school building programmes.

Private schools are funded from capital investments, equity contributions, tuition fees and other school charges, grants, loans and other income sources. The national, regional, provincial, city and municipal governments may also aid school programmes with loans, grants and scholarships to underscore the complementary role of the government and private schools in the educational system.

### **Congressional support**

Another aid to basic education is in the form of the Priority Development Assistance Fund (PDAF) which comes from the budgetary allocation of the members of the House of Representatives. PDAF is usually used as matching fund with the resources provided by private voluntary organisations such as the Federation of Filipino Chinese Chambers of Commerce (FFCCC), specifically for the construction of classrooms.

### **Overseas development assistance**

Active contributors in terms of investment lending are multilateral agencies such as the World Bank, Asian Development Bank as well as the Japan Bank International Cooperation (JBIC). Grant assistance is also extended by developing countries such as the Governments of Australia, Japan, Spain and Belgium.

### **Private sector support**

To mobilise support from the private and non-government sectors, RA 8525 or the Adopt-A-School Program was launched as the national government's vehicle to augment assistance to public education system. With the approval of a revenue policy in March 2003, it granted donors a 150% tax incentive. Participating companies are invited to provide certain programme packages to schools, ranging from teacher training to infrastructure and provision of instructional equipment and materials. A menu of ways in which potential donors from the private and non-government sectors could help public schools depends on the amount of funds these donors could deploy.

### Parents and community contribution

At the local level, strong and well-grounded support is extended by parent-teacher-community associations (PTCAs). The PTCAs provide the necessary assistance to schools in terms of keeping the facilities properly maintained as well as in keeping the peacefulness and orderliness of the premises of the schools. Under the SBM, most have been converted into School Governing Council wherein their roles and functions were further expanded.

Another source of funding for basic education is the Brigada Eskwela or the Schools Maintenance Week. Modeled after Habitat for Humanity, the programme capitalises on the bayanihan (helping each other) spirit among Filipinos to augment school maintenance resources in preparation for the opening of classes. People in the community – including the LGUs, local business and concerned citizens/parties – help to repair, maintain, beautify and refurbish schools. Donations during the maintenance week pour in, in terms of labour, cash and construction materials.

## The context of lifelong learning for sustainable development

### *Establishment of the SEA-CLLSD in the Philippines*

The coupling of education with sustainable development was a paradigm shift that caught many governments unprepared. Although they espoused the paradigm shift, they have neither the resources nor structures and institutions in place to re-orient the thrust of their lifelong learning and education goals, as well as objectives towards sustainable development.

The Southeast Asian Center for Lifelong Learning for Sustainable Development (SEA-CLLSD) was established to collaborate with UNESCO in ensuring that the objectives of lifelong learning and the Decade of Education for Sustainable Development (DESD) are achieved by assisting the countries of the Southeast Asian (SEA) sub-region to make progress towards the attainment of the Millennium Development Goals (MDGs); by providing them with new opportunities to incorporate ESD into their lifelong education reform efforts whether formal, non-formal or informal learning; by encouraging research on the development of lifelong learning and ESD; and by strengthening cooperation in lifelong learning and ESD at all levels through networking, linkages, exchanges and interaction among stakeholders.

Lifelong learning is education from womb to tomb. The SEA-CLLSD sees life in a span of 100 years divided into four periods. From birth to 25 years is the formative period that matches UNESCO's Four Pillars of 21st Century Education (Delors, 1998). The SEA-CLLSD has reconstructed this as: Pillar I – "Learning to Be", when the child learns to talk, and walk independently from birth to six years; Pillar II – "Learning to Learn" with the enormous reasoning power of six to 12-year-olds that easily comprehend all academic lessons in school; Pillar III – "Learning to Work" with the natural creative



talent of 12 to 18-year-olds to acquire economic independence; and Pillar IV – “Learning to Live Together in Harmony” when the 18 to 25-year-old matures with confidence as an adult, enabling the person to start a career or a family. The second period in man’s life is 26 to 50 years when one masters one’s career; the third period of 51 to 75 years is mentoring others; and the fourth period of 76 to 100 is when one leaves a legacy behind (Sheehy, 1996).

Lifelong Learning for Sustainable Development – Just as the womb serves as the “prepared environment” of life before birth, so do a good home, a good school, and a good community sustain each stage of development resulting in behavioural transformation. It includes all types of education from formal, non-formal and informal education systems using several modalities ranging from conventional, innovative to the use of technology and borderless learning systems. Therefore, each period of 25 years is marked by four different types of human self-sufficiency.

Education for Sustainable Development – SEA-CLLSD defines sustainable development as “balancing development with preserving the environment that sustains it”, a concept that is embodied in the Rio de Janeiro Declaration of 1992 and Agenda 21, which complements it. As a partner of UNESCO, which has been designated the task manager of the Decade of ESD, the SEA-CLLSD shares UNESCO’s view that education for sustainable development is for everyone, at all stages of life and in all possible learning contexts. It “addresses all three spheres of sustainable development – society, environment, and economy” with culture as an essential additional and underlying dimension” (UNESCO Education Sector, 2005).

## Good practice in financing LLSD in the country

### *OB Montessori Child and Community Foundation, Inc. (OBMCCFI)*

The OBMCCFI is the implementing arm of the 44-year-old Operation Brotherhood Montessori Center, a unique LLSD training laboratory. Its Pagsasarili Mothercraft programme combines a superior example of ESD literacy programme for mother and child expressing the UNESCO saying, “Teach a Mother, Teach the Nation.” In 1993, the OB Montessori Mothercraft Pagsasarili Literacy Twin Projects won the UNESCO International Literacy Award in New Delhi, India.

The Pagsasarili programme has a track record of 25 years of educating children aged 3–6 from marginalised groups. These students are conditioned to acquire a character of self-sufficiency working in a well-equipped classroom with practical life, sensorial arts, language, math and cultural arts materials where they learn to love work at home and in school. It ignites perfectly UNESCO’s four pillars of 21st century education, particularly “Learning to Be” from birth to six years old.

Its twin project – the Mothercraft Literacy programme – offers a two-week

course for village mothers with practical courses on personal grooming and hygiene, good housekeeping, child care, cooking and nutrition, and a literacy course on language, math and cultural arts. Both courses use the Montessori Pagsasarili materials, which were discovered by Dottorressa Maria Montessori, founder of the Montessori system, and a board member of the UNESCO Institute for Lifelong Learning. Pagsasarili is a Filipino word which means the capacity to be self-sufficient and independent.

OBMCCFI has set up nearly 150 Pagsasarili Preschools all over Luzon: seven Pagsasarili preschools in Metro Manila and in a Muslim community in Taguig City. It has also set up Pagsasarili preschools in 25 public schools all over Luzon and has converted Day Care Centers: eight in the World Heritage Site of the Ifugao Rice Terraces and 98 in Batangas.

### **Partnership with community stakeholders**

There are three types of Pagsasarili Preschools: (1) those organised and managed by the OBMCCFI; (2) those established through MOA with DepEd; and (3) and those converted from Day Care Centers into Pagsasarili Preschools.

To set up the first type (OB Montessori Pagsasarili Preschools in Metro Manila), the OBMCCFI linked with the National Housing Authority (NHA) and the local community. The National Housing Authority, a government agency, provided the schoolhouse and community support to the project. The Foundation provided teacher training, as well as a complete set of Montessori Pagsasarili apparatus of practical life, sensorial arts, language, math and cultural arts, including academic, administrative and financial supervision.

For the second type, the Pagsasarili preschools in the public schools were established through a Memorandum of Agreement with the Department of Education. Meanwhile, the third type or conversion of Day Care Centers was done through partnership with the local mayors and the Department of Social Welfare and Development (DSWD). With the second and third type, both the DepEd and the local mayors provided financial support in the training of teachers, including in-service refresher courses, as well as a complete set of Pagsasarili apparatus for each of the preschool sites. The contribution of specific stakeholders is summarised thus:

- National housing authority – provides the school house and community support in the early stage of the project
- Non-governmental organisations (NGOs) and local government units (LGUs) – provide the classroom, furniture and fixtures, and teaching materials
- Local and foreign funding agencies – provide financial support for the setting-up of classrooms, teaching materials and teacher training expenses
- Parents – help maintain the upkeep of the prepared environment through

volunteer work in the schools by contributing a minimal monthly fee to sustain the operation of the project, particularly teachers' salaries and other miscellaneous expenses.

- Students – are the direct recipients of this project. The academic programme which covers five areas – practical life, sensorial arts, math, language and cultural arts – teach the students to become independent at an early age. They acquire the fruits of normalisation: love for work, obedience, order, concentration, friendliness, love of silence, initiative and joy.

All these 150 Pagsasarili preschools are self-sufficient with the community as the parents of the preschoolers pay an affordable fee averaging US\$5-17.50 per month. Parents of Pagsasarili students recognise that their children get quality education, and are thus very willing to pay monthly participation fees. Their contribution pays for the maintenance and operation of the schoolhouse, including additional allowance for the teachers. In this way, the project continues to be sustainable. At the same time parents are also conditioned not to get used to the dole-out system.

OBMCCFI notes that for partnerships with government agencies to be realised, proposals for projects need to be given in time within the budget schedule of the agencies concerned, otherwise funding cannot be released in time for the proposed project.

It is a pity that the government is investing more in other systems of education for early childhood education rather than using the tried-and-tested, century-old scientific system, of the Pagsasarili preschools, which have been replicated successfully.

### *Notre Dame Foundation for Charitable Activities, Inc. – Women in Enterprise Development (NDFCAI – WED)*

NDFCAI-WED was established in 1984 as the community extension arm of the College of Commerce of Notre Dame University. Today, it has expanded its operations and is now under the auspices of the Notre Dame Foundation for Charitable Activities, Inc., of the Archdiocese of Cotabato. Although it is a Catholic-based institution, the Foundation seeks to serve Muslims, Christians, Indigenous Peoples (IPs), Lumads, and other cultural minority groups residing in the Special Zone of Peace and Development (SZOPAD) areas under the Southern Philippine Council for Peace and Development) in Muslim Mindanao. Specifically, the Foundation focuses on unemployed women and the elderly, girls and unwed mothers, out-of-school youth, and other disadvantaged sectors.

NDFCAI – WED is highly respected, credible and fully accepted as an NGO engaged in literacy and enterprise development work. It is considered in the Philippines a “model” literacy programme implementer by the DepEd BALS, since it is a recipient of numerous awards and recognitions, both within the

country and worldwide, including the 1997 UNESCO-King Sejong International Literacy Prize.

### **Major programmes**

The Foundation has comprehensive projects which provide the following activities: functional literacy and adult education, entrepreneurship and skills training, credit assistance programme, marketing assistance, co-operative formation assistance, technical assistance/ consultancy, as well as research and advocacy promotion. At present, they concentrate on organic agriculture, specifically vegetable farming, as well as family literacy through mother-child healthcare with food security programmes. Partnership with local government units and barangay leaders give them access to the use of community-based facilities.

The Foundation projects have included low-cost housing, cottage industry promotion, development of cooperatives and credit unions among farmers, fishermen and the urban poor. The housing projects of the Foundation have helped families displaced by law and order problems as well as blue-collar workers and teachers who had been evicted from their properties. Four low-cost housing projects have been completed: the Notre Dame Village, Krislamville, Miriamville and Malagapas with a total of 901 families.

The Notre Dame Craft project provides skills training in rattan-craft for unemployed residents of the Notre Dame Village. In 1985, the project was awarded a Golden Shell by the Department of Trade in recognition of its quality products. In 1992, the Foundation took over the USAID-funded Women in Enterprise Development (WED) from the Notre Dame University sub-grantee of Notre Dame Educational Association. The transfer included the entire project staff.

### **Sustainability of the projects**

NDFCAI-WED started with only two centres and about 30 learners in 1984. These adult learning centres are built with community contributions in the form of land or free labour. The learners offer their vacant house space or backyards as learning centres for free. They also help look and negotiate the use of free space in the community like barangay halls and Madrasah Centers.

Ten Community Literacy Centers were constructed through the efforts of the NDFCAI-WED and the Philippine Business for Social Progress (PBSP), a corporate NGO based in Manila with a P3 M grant taken from the Angelo King Building Fund. The centres were constructed in the provinces of Lanao Sur II, Maguindanao, Cotabato City, Basilan, Zamboanga, Sulu, Tawi-Tawi, and Sultan Kudarat where the Mindanao Literacy Network operates.

A Japan-Philippines Resource Training Center was also built, which can accommodate 60 persons living in and a function room with a seating capacity of 150. This is leased out to the public and the proceeds are used for maintenance and upkeep, as well as to augment projects.

Grant assistance from donor agencies both local and international are being used for field-based programmes/projects. Among the donors and funding agencies are: UNESCO – World Education, Inc; USAID; ACCU; ADB; CIDA; Aboitiz Group Foundation, Inc.; the local government of Cotabato City; and the Provincial government of Maguindanao.

There is a big increase in demand for their services, but the Foundation deemed it necessary to limit and down-scale operations due to the 2006 embezzlement of funds committed against the Foundation as a result of a Comprehensive Detailed Audit for Fraud.

### *DepEd – Bureau of Alternative Learning System (BALS)*

BALS, one of the Bureaux under the Department of Education, addresses the basic learning needs of the various marginalised learners who have been deprived of access to basic education through the accomplishments of different ALS programmes, such as:

- 1) ALS Program for Illiterates. This is aimed at eradicating illiteracy among out-of-school children, youth and adults by developing basic literacy skills of reading, writing and numeracy. It has served 18,800 learners with a budget of \$409,000 for a period of 10 months.
- 2) ALS Programmes for Drop-outs of Formal Basic Education. These include the Accreditation and Equivalency (A&E) Program for out-of-school youths (OSY) and adults who are basically literate but who have not completed 10 years of basic education. Serving 28,200 learners with a budget of \$2,200 for 150 learners covering 10 months, the amount allotted was \$409,000 for 17 regions; Balik Paaralan Para sa Out-of-School Adults (BP-OSA), for the secondary level drop-outs, was delivered in 59 public high schools by secondary school teachers who serve as Instructional Managers (IMs); 220 high school teachers/ Instructional Managers served 11,949 learners with the school heads serving as the Principal- Coordinators.
- 3) The Family Basic Literacy Program, for single parents, industry-based workers, OSY and adults in the labour force, utilises literate family members to help non-literate members upgrade their literacy skills and improve the educational opportunities of these poor families in depressed, deprived and under-served areas. Financial assistance amounting to \$650 was released to Regions I, II, IVB, V, VI, IX, CARAGA, and NCR, as expansion sites. The Adolescent Friendly Literacy Enhancement Program provides basic literacy education for 10-24-year-olds about early marriage and parenting, family planning, drug prevention, livelihood projects, health education and environmental education. ALS Parent Education, a three-month life-skills short-term course, presents an opportunity to boost the parents' morale, promote a sense of pride in their work and ownership of their responsibilities as members of the family and their community.

- 4) ALS Program for the Hearing Impaired. This aims to deliver Basic Literacy to persons with disability, who have not availed of or who have not accessed the formal school system through specialised approaches such as sign language, in coordination with Special Education Division of the Bureau of Elementary Education (BEE).
- 5) ALS Program for Indigenous Peoples (IPs) is a research and development project, initially implemented in Ilocos Norte (Isneg), Quezon (Agta), Zambales (Aeta). Learning support funds of \$650 for each pilot site has been provided. Basic literacy materials have been translated into eight mother tongue/ languages assisted by the Translators Association of the Philippines, Komisyon sa Wikang Filipino, DepEd Region IV-B and DepEd Region XI. IP materials have also been translated into eight tribal/ethno-linguistic groups' dialects.
- 6) Arabic Language and Islamic Values Education (ALIVE) in ALS is a timely response to DepEd's EFA 2005-2015 goal to make Muslim migrant learners functionally literate by 2015. ALS cum ALIVE is also made available to Muslim out-of-school youth.

BALS supports the various literacy programmes through the following delivery mechanisms.

- a) The DepEd-delivered Mobile Teacher Program provides learning intervention in difficult- to-reach-areas. Teaching Aid Funds @ \$110/year and Transportation Allowances @ P2,000/ month for each Mobile Teacher have been released.
- b) District ALS Coordinators (DALSC), are part of a local arrangement, wherein formal school teachers are designated to coordinate ALS implementation in the district and conduct learning sessions for illiterate OSY and adults and school-leavers. There are Teaching Aid Funds @ P2,500/year for full-time DALSC and P1,250/year for part-timers plus transportation allowance.
- c) The DepEd Procured Unified ALS Contracting Scheme maximises the legitimate involvement of government and NGOs in the provision of quality education to OSY and adults. Funds of \$817,000 for 17 regions with 188 learning groups were released.

Noting the limited budget available for DepEd-BALS, the DepEd Secretary recommended that better coordination with other education stakeholders is needed to create an effective mechanism that will integrate BALS programmes with TESDA, CHED and even DSWD. He proposed to include various ALS packages in the priority shortlist with potential donors and advised that more cost-effective alternative learning opportunities could be tapped. The Secretary hopes that the ALS standards could be upgraded by providing relevant training and welfare packages.

## Lessons learned and recommendations on financing LLSD programmes and activities

SEAMEO-INNOTECH organised and conducted a research/survey, “The Status of Education Financing of Lifelong Learning Programmes for Sustainable Development in Southeast Asian Counties” (Ramirez, 2009). Funded by the UNESCO Participation Programme, they invited researchers from 11 countries, namely: Brunei Darussalam, Cambodia, Indonesia, Lao People’s Democratic Republic, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor Leste and Vietnam to undertake this survey, the results of which were presented at a sub-regional workshop in July 2009.

### *Lessons learned*

In view of the major constraint, which is financing, several insights and lessons surfaced. Almost all agencies, organisations and institutions had a common difficulty in financing LLSD programmes. Budget is very necessary for LLSD programmes to succeed and innovative strategies of making the budget sufficient for the LLSD needs must be tried out. Examples of such innovations follow:

- Adequate financing must be provided not only for the various LLSD programmes, projects and activities, but should also include budget for equipment and facilities;
- Incorporate the cost of instructional materials to the budget of the LLSD programme or project;
- Budget proposals must be aligned with the scope of services that they need to render and the stakeholders they need to reach;
- Partnership with government agencies must be proposed in line with the budgeting schedule;
- Phase each activity per target output taking into consideration budget constraints so that each phase will be realistically funded and meaningful results may be attained;
- Programmes and services must be effectively delivered to target clientele;
- Participants must pay a minimal amount so that they will appreciate the benefits of the new knowledge they acquire;
- Parents need to give monthly participation fees to pay for the salaries of teachers/facilitators;
- Mentoring/refresher courses after the initial training/workshop is necessary to further the application of knowledge learned;
- LLSD programmes must always be integrated in all project components; and
- LLSD project benefits must be commensurate with the number of beneficiaries.

### *Recommendations*

In the light of the findings from this survey and in response to all the insights in lessons learned, the following recommendations seem justified:

- Better coordination with other LLSD stakeholders, especially in terms of policy and programme development;
- Seek and develop partnerships with both the private sector and local government;
- Lessen manpower requirements by using various technologies, like radio, television, e-learning and other forms of multimedia, which may provide cost-effective alternative learning opportunities in support of LLSD;
- Find partners who will help in upgrading the personal and professional welfare of LLSD providers;
- Evaluate and select quality LLSD service providers;
- Pool together earmarked and allocated financial and other resources required for the implementation of LLSD programmes, projects and activities;
- Utilise economical but effective modes of social mobilisation and promotion of LLSD;
- Install a monitoring and evaluation system for all LLSD programmes to ensure proper financial sustainability;
- Activate the Southeast Asian Center for Lifelong Learning for Sustainable Development as an inter-agency coordinating body, which will be tasked with formulating policies, plans and programmes for an integrated LLSD not only for the Philippines, but for the Southeast Asian sub-regional countries as well.

### *Conclusion*

In a world where knowledge has become a crucial element for nations to prosper and compete, primacy is placed on quality and accessible lifelong learning, from early childhood development to primary, secondary and tertiary learning. The Southeast Asian Center for Lifelong Learning for Sustainable Development, which has just been conferred Category 2 status by UNESCO, is in the process of fully operationalising its mandates. Thus, we enjoin everyone, especially those from the Southeast Asian countries, to work closely and coordinate with our Center so that we may achieve the goals of lifelong learning and education for sustainable development.

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## Acknowledgement

I would like to extend my heartfelt gratitude to all those who assisted me in preparing this paper presentation, particularly to Ms. Marinette Reyes (Development Management Officer of UNESCO National Commission of the Philippines) and Ms. Miriam Coprado (Planning Officer of the Department of Education). Their unselfishness in sharing their knowledge and documents of their respective offices pertaining to the topic aforementioned is very valuable.

# 15 Using research to guide policy frameworks for building a learning society in the United States of America

Judith Alamprese<sup>1</sup>

## Introduction

Public policy is an important tool for building learning societies with strong systems of formal education. A country's laws or regulations can prompt the development of policies that promote adults' educational access, quality, and outcomes. In the absence of legislation, informal policies or guidance often are used to stimulate the implementation of new practices to address educational problems.

The potential for using policy to encourage activities for building a learning society was discussed during CONFITEA VI, the Sixth International Conference on Adult Education that was held in December 2009. Conference participants noted the importance of having systems for collecting and analysing data that can document the need for a country's literacy services, progress in delivering these services, and adults' literacy development as a result of these services. The critical role of quality adult education instruction in facilitating adults' learning was a prevalent theme in the conference's sessions, and participants observed that instruction can be strengthened through requirements for teacher credentialisation and participation in professional development. Participants also recognised the need for systems of coordinated services to support lifelong learning and the role of incentives in developing partnerships and fostering the coordination of services.

While policies can be instrumental in promoting access to adult education services and strengthening the quality of services, there often are challenges in implementing policies. CONFITEA VI participants pointed to the difficulty of "marketing" policies to stakeholders at the national, state and local levels so that government officials, service providers and service participants understand and support the requirements associated with policies. The successful implementation of policies sometimes requires technical

assistance, and CONFINTEA participants acknowledged that the resources and technical expertise needed to provide this assistance often are not available.

One example of a country's efforts to strengthen adult education through policy is the United States, where the US Department of Education has used formal policies, guidance and technical assistance to enhance and support its system of adult education services. At the state level, agencies funded by the US Department of Education to administer federal adult basic education (ABE) monies also set policies to guide the operation of adult education services in local communities. As federal and state agencies develop policies and offer technical assistance to address issues related to the delivery of ABE services, the use of research has emerged as an important component of these processes.

Adult education policy-makers are using results from research to gain insights about the aspects of the adult education service delivery that can be improved through policy and technical assistance. For example, data on the limited number of adult basic education learners who enrol and complete post-secondary education has prompted the US Department of Education to examine its current policies for tracking ABE learners' post-secondary participation. Under consideration is whether to revise current policies about the population of ABE learners who are tracked so that more accurate data can be obtained on the number of participants who enter post-secondary education (US Department of Education, 2010a). The data about limited enrolment of ABE participants in post-secondary education was a facilitating factor in the US Department of Education's funding of a technical assistance project in which local ABE programmes tested new services to help ABE adult learners make the transition to post-secondary education (MPR Associates, Inc., 2007).

Evaluation studies are also sources of information about the effectiveness of the technical assistance that is conducted to support the implementation of policy. The US Department of Education's Student Achievement in Reading (STAR) initiative that encourages the use of evidence-based reading instruction in ABE programmes has been a significant technical assistance effort involving the provision of teacher training and implementation assistance to ABE programmes (Curtis *et al.*, 2007). An evaluation is underway to assess the effectiveness of STAR in developing ABE learners' reading skills, and one use of the results will be used to strengthen the technical assistance that is currently being provided (Alamprese and Price, 2008).

The role of research to inform the development of policy and the design of technical assistance to facilitate policy has limited documentation. Discussed in this paper are the legislative context for adult education policy in the United States and three areas of emerging research that have implications for the development of effective adult education services and for informing policies and guidance:

- teacher quality and effectiveness;
- systems alignment; and
- career pathways as an instructional focus.

## The US context for adult education policy

The development of policies for adult education is a shared responsibility of the federal government and individual state governments in the US. The Workforce Investment Act (WIA) of 1998 (Public Law 105-220) is the primary federal legislation that funds the delivery of adult basic education services. Under WIA Title II – the Adult Education and Family Literacy Act – the US Department of Education’s Office of Vocational and Adult Education has issued adult education policies for its performance accountability system that state agencies must follow if they receive Title II monies to support local adult education services (WIA, Title II, Section 212).

While learner assessment and data accountability are the main mandated policy areas under WIA Title II, the legislation also has 12 Considerations that state agencies must address in funding local adult basic education services (WIA, Title II, Section 231). These Considerations address the types, quality, and characteristics of services that local ABE programmes should provide and, as such, are signals to states about the guidance or policies that they might develop to support the grantees that they fund. Some of the 12 Considerations are specific and can be directly translated into policy, such as the guidance to use instructional practices including phonemic awareness, systematic phonics, fluency, and reading comprehension that research has proven to be effective in reading instruction. Other Considerations are general and would require a state to define the conditions of the services before issuing guidance or policy. An example is the requirement to have programmes of sufficient intensity and duration for participants to achieve substantial learning gains. While there are limited formal policies issued to states under WIA, Title II, the legislation does provide substantial guidance as part of the 12 Considerations that states can use to develop their state policies to support the delivery of local adult education services.

WIA Title II also enables the US Department of Education to spend monies allocated under the National Leadership Activities account (Section 243) to support research, evaluation, professional development, demonstration and dissemination to strengthen adult basic education and literacy services. Among the ways in which the Department of Education’s Office of Vocational and Adult Education has used these funds is to provide technical assistance to state adult education staff in the implementation of policies for Title II’s performance accountability system.

As new policy directions are identified at the federal level, such as the need to assist low-skilled adults in attaining post-secondary education and

training, the Office of Vocational and Adult Education has funded the development of innovative service models through demonstration projects. These projects alert the states to the importance of a new policy direction and provide technical assistance to states and local adult education service providers in implementing new services to meet the need being addressed in the new direction. WIA Title II also gives states the authority to use their State Leadership Activities funds (Section 223) to support professional development, technical assistance and evaluation. States' professional development activities have included training for new state policy initiatives, such as the development of adult basic education content standards to improve the quality of instruction that is provided by local ABE services. State Leadership funds also are used for ongoing training in the use of states' performance accountability systems.

The WIA legislation has been a mechanism for the federal office of adult education to support the implementation of formal policies and provide states with resources and expertise to facilitate their development of policies, guidance, and practices. Discussed below are examples of the ways in which research, policy and technical assistance can build strong systems of adult basic education.

## Teacher quality and effectiveness

Research related to adult education teacher quality in the US has focused in part on the effectiveness of instruction, particularly in reading. Results from reading instruction research on low-skilled adults indicate a positive association between reading instruction that is structured and sequential and adults' development of decoding skills (Kruidenier, 2002; Alamprese, 2009a). This finding is supported by children's reading research that examined the use of components-based reading instruction delivered through structured curricula (National Reading Panel, 2000).

A US Department of Education technical assistance activity that is based on reading research is the dissemination of the STAR methods and materials which are designed to prepare adult education reading teachers to deliver components-based reading instruction (Curtis *et al.*, 2007). States have adopted STAR and supported in-state professional development teams to facilitate ABE reading instructors' use of STAR.

A related policy direction that is being implemented by state adult education offices and which has been supported by the US Department of Education is the development of adult education curriculum frameworks and content standards. The Department of Education has funded a series of technical assistance projects to assist states in developing and implementing content standards. These federally-sponsored activities have enabled states to set policies and guidance about the use of content standards that would

not have been feasible without the federal support.

Another aspect of teacher quality is certification. A nationally-representative study of ABE programmes found that less than one-quarter (19%) required instructors to hold a K-12 certification and that many programmes have no teacher credentialing requirements in either elementary or secondary education (Tamassia *et al.*, 2007). These data suggest that many instructors teaching adult basic education in the United States have no formal training in teaching methods. A policy step being considered by a number of states is to develop adult education certification systems.

Promotion of the delivery of evidence-based professional development has been supported by the US Department of Education through their funding of projects such as the Center for Adult English Language Acquisition Center (CAELA) Network. In this project, research briefs, training products, and technical assistance related to adults' English-language acquisition have been provided to state adult education agencies and local adult education programmes (Center for Applied Linguistics, 2007). A key component of the CAELA Network has been the staff's activities in guiding states in their collection and use of data on immigration trends, learner performance outcomes and instructor background characteristics to identify professional development priorities and services for improving the quality of instruction provided to English-language learners. The project's Framework for Quality Professional Development for Practitioners Working with Adult English Language Learners has provided states with guidelines to use in designing and selecting professional development activities (Center for Applied Linguistics, 2010). Some states have used the framework as informal policy for their local ABE grantees' activities in selecting professional development for programme staff.

## Systems coordination

Partnerships are critical to aligning services, having data systems for tracking learners and enabling learners to move in and out of educational services with some flexibility. Research has shown that partnerships between agencies and services are essential in assisting adult education participants to transition to post-secondary education and employment. Research also has informed the ways in which individuals can cooperate to identify a common ground on which they can work together (Pindus *et al.*, 2005; Alamprese, 2009b).

While WIA mandates coordination of services between One-Stop Centers and other service providers, there has been considerable variation in the extent to which employment services and adult education service providers have worked together. As a result, the cross-referral of clients between employment and education services has not occurred consistently (Pindus *et al.*, 2005).

To address these challenges in inter-agency coordination, the US Department of Education funded the Adult Education Coordination and Planning (AECAP) demonstration project to test research-based models for strategic planning and interagency coordination. Of the six states and 12 local pilot sites that participated in the project, four of the states and their pilot sites focused on improving the coordination between adult education and workforce development.

Processes for cross-referral of clients between adult education and workforce development were designed and implemented, and curricula that integrate basic skills and occupational skills were developed and tested. The processes for cross-referral of clients involved changes in local adult education and workforce development programme policy regarding the types of client information entered into the programmes' databases and the staff who could access the databases. These changes resulted in more timely cross-programme sharing of client information, which in turn helped to improve the quality of services that the clients received. The pilot site in which adult education, workforce development and post-secondary education staff worked together to provide integrated instruction and job placement was an example of how coordinated services can lead to positive client outcomes.

The pilot site's ABE programme worked with a community college to provide a course that integrated English-as-a-second language instruction with nurses' assistant training. Clients who completed the course requirements and the practicum, as well as passed the certified nurses' assistant examination, were eligible for job placement through the local workforce development agency. The collaboration among the staff in the three organisations enabled clients to move through the education, certification and job placement processes efficiently and effectively. Through the AECAP project, processes and products for state and local coordination were developed and disseminated to support adult education state and local staff in working with other agencies in support of adult learners (Alamprese and Gwaltney, 2010).

The Workforce Investment Act's requirement for states to report follow-up data on ABE learners' enrolment in post-secondary education and in job attainment and retention after participating in ABE services has prompted states to develop cross-agency agreements for sharing data as well as coordinated data systems for longitudinal tracking of data (US Department of Education, 2007). One result from the federal policy to collect follow-up data on ABE learners has been the availability of data that can be used to document learners' long-term outcomes from participation in ABE services.

## Career pathways

The need for a better-skilled workforce in the US has been a key factor driving a variety of efforts to support and develop career pathways activities to prepare low-skilled adults to succeed in post-secondary education and technical training. The US Department of Education, states, and private foundations have funded projects to demonstrate programmes, practices and policies that can facilitate the transition of low-skilled adults to community college post-secondary education programmes (US Department of Education, 2010b).

An integral component of career pathways services for low-skilled adults is instruction that integrates basic skills – ABE or English as a second language (ESL) – with occupational skills. While not new in the practice of adult education, integrated instruction involving ABE/ESL and occupational skills has become more prevalent as ABE and ESL instructors work collaboratively with post-secondary education faculty, workforce development providers and employers to design instructional components, career pathways services or work-based learning.

States have used different approaches in developing systems and policies for adult education career pathways. The Washington State Board for Career and Technical Colleges (SBCTC) conducted research to understand the needs of working-age adults with a high school education or less or who did not speak English, to further their education and training, and to understand both the economic importance of having a better qualified workforce and state-level policy implications for developing strategies to improve results for students and employers. The Tipping Point study tracked the participation and outcomes of 35,000 working-age adult students who were enrolled in Washington's career and technical colleges.

The results from the research indicated that students' attainment of one year of college-level credits and a credential is the tipping-point for them to obtain a substantial increase in their annual income (Washington State Board for Career and Technical Colleges, 2005). SBCTC determined that in order for more adults to obtain this outcome, a deliberate strategy for innovation and systemic change was needed in the policies and educational programmes for working-age adults with a high school education or less or who do not speak English. In particular, policies were needed that would: (a) encourage the development of pathways for low-skilled adults that would enable them to increase their educational attainment and obtain higher skilled jobs, (b) change the conditions for working-age adults' access to financial aid and (c) provide expedited educational programmes for these adults.

To address these needs, SBCTC developed I-BEST as a comprehensive approach to assist low-skilled adults. I-BEST provides learners with an education and career pathway that integrates learning outcomes and



assessment and is matched to the local labour market. In the instructional component of I-BEST, a basic skills instructor is paired with a professional-technical instructor in the same classroom at the same time. This approach enables learners to develop their academic and workforce skills that can lead them to a living wage job that is on a career path in an occupational field. This strategy is intended to assist learners in attaining skills at a faster rate than in instructional programmes in which basic skills instruction is provided prior to workforce training. The basic skills courses offered under I-BEST also are contextualised to skills that students need to succeed in a particular job or career path (Mendoza, 2009). The results of the demonstration phase of I-BEST have shown that ABE students enrolled in I-BEST courses had higher skill gains than ABE learners who were enrolled in ABE courses that did not involve an I-BEST approach (Jenkins *et al.*, 2009).

In Oregon, the Department of Community Colleges and Workforce Development (CCWD) developed the Oregon Pathways for Adult Basic Skills (OPABS) Initiative that has two main goals: (1) to increase the number of ABE learners who have a career goal and transition to post-secondary education and (2) to improve the quality of ABE programmes so that there are systematic processes for ABE learners to move to post-secondary courses and employment. Since 2007, ABE faculty and learners from nine community colleges have participated in OPABS course field-testing and revision phases, and OPABS is now being expanded to the eight other community colleges in the state.

OPABS has five components of activities. The instructional component involves five accelerated ABE courses in reading, mathematics and writing that incorporate occupational applications from Oregon's high-demand industries. The ABE courses are based on academic standards and integrate occupational information using a survey approach, in which information about high-demand career areas is the focus, but a range of occupational information is integrated into the courses. Each course has a criterion pre-test score to promote learner success and a standardised course format to facilitate quality instruction. The courses, which are designed at two skills levels – Pre-Bridge (6th-8th grade equivalent) and Bridge (9th-12 grade equivalent) – include 60 lessons per course.

College and career awareness is the second component. A College and Career Awareness Course provides information about the characteristics and educational requirements of jobs in local labour markets, the educational programmes in the colleges related to these jobs, and learners' skills, interests, and educational and employment background. The course also includes learners' preparation of a Career Pathway Plan. Three Advising Modules are available to assist learners in applying to college, taking the admissions test, and qualifying for financial aid.

The third component is ABE programme services, which involves the restructuring of learner recruitment, orientation, assessment, and placement

in courses. Professional development, the fourth component, has included training ABE faculty to teach the OPABS courses and Advising Modules. The professional development workshops are being refined to expand OPABS to the eight remaining community colleges.

The final component involves data systems and evaluation. Data are being collected from learners participating in the courses to assess their perceptions of the utility of the courses and measure their basic skills development. During 2008-2009, 47 OPABS classes were conducted in nine colleges for 450 learners, and learners' assessment of the courses was very favourable. Data about learners' pre-post gains in basic skills are being analysed. The state's data systems will be enhanced to track ABE students' longitudinal outcomes regarding their participation in and completion of post-secondary education (Alamprese, December 2009).

The activities of Washington and Oregon in developing and implementing career pathways systems illustrate state approaches to using research to guide policy, particular in the types of integrated ABE and occupational instruction that should be provided to low-skilled adults and the types of professional development that ABE staff require to be able to teach integrated courses. Both states have used technical assistance to promote quality instructional services, inter-agency coordination and alignment of systems. Their activities in collecting data to assess the progress of their demonstration activities are an example of how research also can be used to inform continuous programme improvement.

## Conclusion

US federal and state activities in using research to inform policy and practice in adult education are emerging as an approach that can facilitate the development of well-grounded policies and support the implementation of effective practices that are needed to build learning societies. Federally-sponsored research has helped to identify barriers to teacher quality and effective strategies for inter-agency coordination. Federal and state technical assistance is instrumental in supporting the implementation of policies related to federal legislation and in preparing local service providers for new programme improvement initiatives. Research, policy and technical assistance are at the crux of federal and state initiatives to provide a variety of systemic approaches that can facilitate low-skilled adults' attainment of post-secondary certificates, credentials and degrees as an entrée to family-sustaining jobs. Further investigation is needed to understand the ways in which research, policy and technical assistance can be better aligned to facilitate quality services at all levels of adult education.

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## Part III

Distance education, new  
learning media and higher  
education in lifelong learning

# 16 Distance education: ends, means, opportunities and threats

Sir John Daniel<sup>1</sup>

## Abstract

Once thought of as a second-rate form of instruction, distance learning now holds the key to an educational revolution that will see access expanded, quality enhanced, and cost reduced. After explaining the essential principles of technology and the basic methods of distance learning, the paper explores the opportunities presented by the new media but warns of attendant threats to cost-effectiveness.

## Introduction

It is a pleasure to be able to combine this UNESCO event with the main reason for my visit to Shanghai, which is to speak at the celebrations of the 50th anniversary of the Shanghai Television University later today. It is also good to be in a UNESCO event again.

I much enjoyed my time as Assistant Director-General for Education from 2001–2004 and am delighted to continue collaborating with UNESCO under the work plan agreement between UNESCO and the Commonwealth of Learning that was renewed at the end of last year. May I also say how pleased I am that UNESCO has its first Chinese ADG/ED, Dr Qian Tang. I worked closely with him and I am sure he will do a wonderful job.

This morning I shall try to encapsulate in some 20 minutes what I have learned about distance education in the last 40 years. My title is *Distance Education: Ends, Means, Opportunities, Threats*.

## Distance education: the ends

I start with the ends – or purposes – of distance education. Why is this form of education, long regarded as second rate, now of such wide interest? I shall argue that it is not only of interest, but that it contains the seeds of a revolution that can sweep away the biggest obstacle that education has faced throughout human history.

### *The challenges facing education*

Ministers of Education will tell you that the challenge they face is to pursue three goals simultaneously. They want to widen access so that education and training can be available to all citizens that aspire to it.

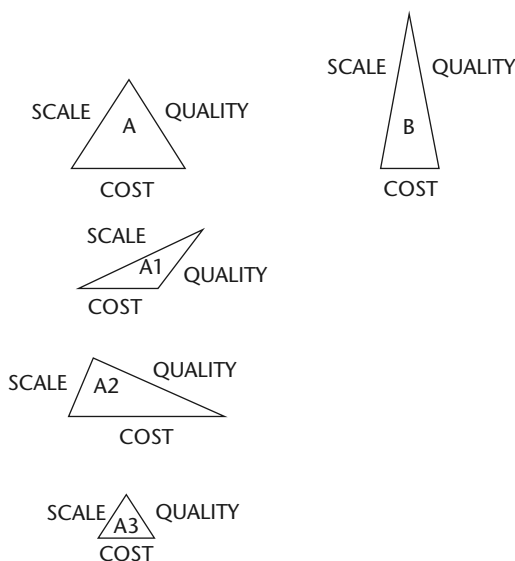
Second, that education must be of good quality. There is no point in widening access unless education makes a difference to people's capabilities.

Third, the cost must be as low as possible. Governments and individuals never have enough money. It is morally wrong to make education more expensive than necessary, because low cost enables more people to take advantage of it.

But the challenge of achieving these outcomes simultaneously becomes clear when you create a triangle of vectors.

With traditional methods of face-to-face teaching this is an iron triangle. You want to stretch the triangle like this to give greater access, higher quality and lower costs.

But you can't!



Try extending access by packing more students into each classroom and you will be accused of damaging quality.

Try improving quality by providing more and better learning resources and the cost will go up.

Try cutting costs and you will endanger both access and quality.

This iron triangle has hindered the expansion of education throughout history. It has created in the public mind – and probably in your own thinking – an insidious link between quality and exclusivity. This link still drives the admission policies of many universities, which define their quality by the people they exclude.

But today there is good news. Thanks to globalisation successive waves of technology are sweeping the world – and technology can transform the iron triangle into a flexible triangle.

### *The revolution of technology*

By using the technology of distance education you can achieve wider access, higher quality and lower cost *all at the same time*. This is a revolution – it has never happened before. This is what educational technology can achieve if used properly.

What is technology? I define it as the application of scientific and other organized knowledge to practical tasks by organizations consisting of people and machines, so it draws on non-scientific knowledge as well as applied science. Technology is about practical tasks rather than theory and always involves people and their social systems. Expanding and improving education is a very practical task. People and their social systems are at the heart of it.

But how does technology work? The fundamental principles of technology, articulated two centuries ago by the economist Adam Smith, are division of labour, specialisation, economies of scale, and the use of machines and communications media (Smith, 1776).

### *An example: the UK Open University*

Let me make this real by showing how the application of technology to higher education has achieved remarkable success. I take the example of the UK Open University.

With 220,000 students in award-bearing programmes the UKOU has clearly expanded access. Furthermore this is not just in the UK since 60,000 of its students are overseas, and there are a million students around the world taking UKOU courses embedded within local programmes.

Many of these courses derive from the Open Educational Resources on the UKOU's OpenLearn website. I shall come back to Open Educational Resources.

More surprising to you no doubt – and more embarrassing for some of the UK's other top universities, is the UKOU's performance in national comparative assessments of teaching quality. The Open University places



above Oxford, where I once studied. Moreover, the government now conducts national surveys of student satisfaction with a very large sample of students and the Open University has come top three years running.

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**BRITAIN'S TOP NINE UNIVERSITIES**

Quality Rankings of Teaching

based on all subject assessments 1995–2004

(*Sunday Times University Guide* 2004)

1	CAMBRIDGE	96%
2	LOUGHBOROUGH	95%
3=	LONDON SCHOOL OF ECONOMICS	88%
3=	YORK	88%
5	<b><u>THE OPEN UNIVERSITY</u></b>	<b>87%</b>
6	OXFORD	86%
7	IMPERIAL COLLEGE	82%
8	UNIVERSITY COLLEGE LONDON	77%
9	ESSEX	77%

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Finally, the last time costs were compared the cost per graduate of the UKOU was 60-80 per cent that of conventional universities, depending on the subject.

So the Open University has achieved the technological revolution of wider access, higher quality and lower cost. It has stretched the iron triangle.

How has this been achieved? It has been done through the combination of Adam Smith's technological principles. In the category 'Machines and ICTs' the UKOU offers a multi-media system of distance learning with strong student support.

This multi-media system includes some of the world's largest deployments of eLearning but the key issue is not the eLearning or any of the other media, but the focus on division of labour, specialisation and economies of scale. You could say that the UKOU divides the teaching and learning process into its constituent parts, gets different people to specialise in doing each part as well as possible and then puts it all back together again into an integrated system.

## Distance education: the means

This leads me naturally into my remarks about the means by which distance education is carried out. I talked about the purposes of distance education using the analogy of a triangle. For the means my metaphor will be a three-legged stool.

### *Distance learning and remote-classroom teaching*

But I begin by distinguishing two methods of conducting distance education.

The first is called remote-classroom teaching and used to be popular in the United States. The idea is to connect a teacher through an audio or a video telecommunications link to students in a series of remote classrooms. This allows a teacher to reach a larger number of students spread over a wide area. If the equipment is well designed and the instructor well trained useful interaction can take place between the students and the teacher.

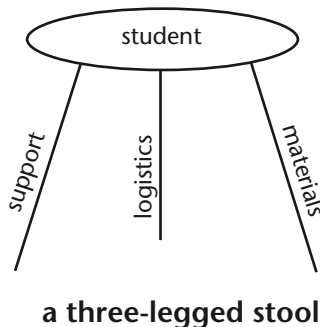
However, I shall not talk further about this approach for several reasons. First, it tends to be expensive, because of the telecommunications links. Second, you can't scale it up beyond a limited number of remote classrooms so it does not stretch the iron triangle. Third, it still requires students to be in the classroom at a set time, so it does not give much flexibility. Fourth, the growth of connectivity has led most distance educators to move to forms of asynchronous delivery.

So I shall focus instead on the second approach to distance education, which I call distance learning. The aim here is to take to the individual learner, at home, at work, or travelling, whatever is necessary for effective and enjoyable study.

There are three ingredients, so you can think of distance learning as a student sitting on a three-legged stool.

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### **DISTANCE LEARNING**



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The first leg is good study materials. Today you can use lots of media for this, audio, video, print, the Web, CDs and DVDs, pen drives, the Internet and so on.

The second leg is good student support. Most students cannot succeed on independent study alone. They need support from teachers or tutors.

Some of this can be provided by phone, e-mail or correspondence. Sometimes students get together physically in local groups.

The third leg is good logistics. Study materials are no use unless they reach the students. Examinations must be administered, supervised and marked. Often these operations have to be carried out on large scale – fifteen years ago I coined the term mega-universities for open universities with over 100,000 students.

If you operate on that scale even an administrative error that affects only 1% of students means more than a thousand unhappy students. In fact, at least three of the mega-universities today have over one million students, so such errors will now affect 10,000 students – which equal the total student numbers at Oxford University when I was a student there in the 1960s.

## Distance education: the opportunities

My third section is about opportunities. The good news is that each generation of technology improves the basic cost structures of distance education. Later I will mention the accompanying threat, namely that new possibilities like eLearning can lead us to take our eye off the iron triangle and relapse into the high costs of the cottage industry model.

We must remember that the basic reason for the competitive cost structure of distance education is the economies of scale that go with producing and distributing learning materials. Books already benefited from great economies of scale but broadcast media and the internet make volume production and distribution even cheaper. However, the cost of the brain power needed to produce the first copy does not come cheap.

That is why the trend to create a pool of open educational resources is such an opportunity. It means that each teacher does not have to reinvent the wheel. But it does not mean that each teacher has to use a standard product because the key idea behind open educational resources is that each person can version them to taste.

Open Educational Resources are learning resources in digital formats that are freely available for adaptation and use by anyone. I find this notion of a global intellectual commons very exciting, provided that it is not perverted into an exercise in neo-colonialism. OERs are an opportunity to draw on resources from around the world, not an invitation to the rich to try to impose its own materials on the poor.

At the Commonwealth of Learning we are increasingly involved in OERs because they can contribute to our three objectives of scaling up quality learning at low cost.

For example my colleague Abdurrahman Umar is deeply involved in TESSA (Teacher Education in Sub-Saharan Africa), a consortium of 18 African universities and the UK Open University that has produced a huge range of OERs in Arabic, English, French and Kiswahili, for classroom-focused in-service teacher education at primary level. They are being used by half a

million African teachers.

Closely related to open educational resources are a second application of eLearning that we have found useful – and which has made us think hard about the nature of open content – is wikis.

A few years ago our COL colleague Wayne Mackintosh created WikiEducator. It very quickly attracted tens of thousands of participants. With support from the Hewlett Foundation, he used it in a very original way to train thousands of people through face-to-face and online workshops. The deal is that teachers can learn wiki skills free provided they use those skills to contribute one lesson to the pool of OERs.

The Commonwealth of Learning is facilitating a project called the Virtual University for Small States of the Commonwealth, which is not a new institution but a collaborative mechanism that permits small states all over the world to work together on producing open education resources.

In 2006 a dozen countries got together in Mauritius to develop courses on eco-tourism. This year a group of experts from 18 small countries worked together in the Maldives to develop a diploma course in sustainable agriculture for small states. Having returned to their countries they finalised the course by online collaboration.

Finally, under the heading of opportunities, let me say that although this forum is about lifelong learning, there are now massive opportunities at the secondary level. 400 million children between the ages of 12 and 17 are not in secondary education and they will be the world's greatest educational challenge for at least the next ten years.

For this reason I have followed up my 1990s book on mega-universities with a new book *Mega-Schools, Technology and Teachers: Achieving Education for All* that was published last month (Daniel, 2010). It argues that we shall never achieve universal secondary education, nor train the teachers necessary to complete the drive to universal primary education, without massive recourse to distance education.

## Distance education: the threats

Finally, I come to the threats. The future looks rosy but there are risks.

To operate at scale with low cost and consistent quality all distance education operations, independent of the learning media they use, implement the principles of division of labour and specialisation. You can always identify the three organisational sub-systems of administration and logistics, course development and student support – and there are, of course, finer divisions of labour and specialisation within each sub-system.

Here is the potential threat. I believe that if you want to do eLearning well you must use these principles of division of labour and specialisation. But in higher education people often do not. Indeed, some say that one of the

attractions of eLearning is that it does not require faculty to operate in a different way.

They can continue with the cottage industry approach, with each academic doing their own thing and taking care of every step in the instructional process. My fellow Vancouverite, Professor Tony Bates calls this the 'Lone-Ranger' approach to eLearning.

Earlier I cited Adam Smith's list of the principles of technology. Some of you will have recognised it from his description of the pin factory, one of the classics of economics that you can find in seconds on the web. I recommend you read it.

His basic point was that when you make pins in a factory they are a lot cheaper, and of more consistent quality, than if one artisan makes them individually. I can safely assert that no one would dream of making pins individually today, but this inefficient, poor-quality approach persists in higher education. Worse, eLearning is often being used to embed it and make higher education less cost-effective than it was before, because it is simply an add-on to existing practice.

This may not matter in rich jurisdictions like North America where the monumental function of universities has always been more important considerations of cost-effectiveness. And, until now at least, such institutions have been able to raise their fees faster than the rate of inflation instead of trying to give the student better value for money.

I would love to be proved wrong. In many speeches, after raising this issue, I have begged people to send me any studies that show eLearning to have improved the overall cost-effectiveness of a higher education institution.

I make it clear that I'm not talking about the rather pointless studies that show 'no significant difference' in learning outcomes when eLearning is compared to classroom teaching. I want to know if the overall efficiency of the university or college has been improved, classrooms have been decommissioned and there has been genuine substitution of capital (i.e. technology) for labour. So far no one has responded with an example.

As I said, this may not matter in rich jurisdictions, but it matters a lot in the places I work where resources are scarce and access to education woefully limited. In such places the insidious links between quality, cost and exclusivity are balls and chains holding nations back. eLearning should be a liberating force not a throwback to the past.

Our aim must be to use the technology of distance education to stretch the iron triangle so that quality education is accessible to all at reasonable cost.

## *Reference*

- 1 Sir John Daniel is the President of the Commonwealth of Learning

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# 17 The new paradigm of lifelong learning and the construction of a new learning media market – informal and non-standard learning platform for all

Kang Ning<sup>1</sup>

The developmental history of the application of technology in domestic and foreign education systems, in particular the transition period from correspondence and network broadcasting education to open distance and digital network education, also charts the transition of education from a collective, formal, standardised and uniform model to an individualised, informal, non-standard and multi-choice model. These new characteristics correspond to the ongoing transition from the demand for national education to that for lifelong education.

Traditional distance education has essentially accomplished its mission as a substitution technology in the early stages of lifelong education. Its original functions far from satisfied the requirements of tens of thousands, or even hundreds of millions, of lifelong learners, but the emerging new media technology platform, which is becoming a fundamental influence on the development of lifelong education, heralds a turning-point in the strategic growth of education.<sup>2</sup> Technologies make increasingly possible a ubiquitous learning environment. From this perspective, we contend that traditional distance education, like standardised and school-based forms, will soon come to an end and that education development will in turn welcome a historic turning point. The time of lifelong education, education for all and all-time education, in their most strict senses, has finally arrived.<sup>3</sup>

## Technological innovation of new media and the new paradigm of lifelong learning

The basic idea behind classic learning is the passive internalisation of external knowledge into one's cognitive structure. The basic mode is to spend half or one third of one's lifetime on learning and training so as to obtain the skill and capability needed to play an active role in society and

the workplace. The learning process is a linear one in which “teachers teach and students learn”, and the individual grows by “completing school, and then working and living”.

We have never before doubted such a traditional process, as it has indeed met the educational demands of industrialised societies for more than 100 years. However, we have now entered into a world of information and knowledge explosion where changes and transformations occur unbelievably rapidly. A person’s capacity to internalise knowledge is limited, while external knowledge and information has become infinite. So how shall we, with limited strength, swim comfortably in the boundless ocean of knowledge?

Lifelong education, in combination with modern information technology, has come into being. The new generation of technologies (represented by new media technology, including ubiquitous computing, mobile communications technology, unified communications networks, intelligent terminal technology, and so on), which has already had a profound impact on education activities, also provides the technological foundation for new forms of teaching and learning activities in the future.

The most profound impact that new media technology has had in the field of education has been to make education ubiquitous. Learning opportunities can be found everywhere in life and work. The ubiquitous computing environment has made it possible for learners to receive support at any time and place for any practical issue. Indeed, it is now fair to say that learning has become so integrated with life that we are not even aware<sup>4</sup> of it, and that *life is learning*.<sup>5</sup>

In this sense, the new paradigm of lifelong learning is the natural interaction of learners through information technology, which enables them to share and construct individual and social cognitive networks, in a ubiquitous learning context and in real-life scenarios. Its core characteristics include:

- **Ubiquity:** learning occurs at any time and place and is so well integrated in work and life that it becomes subconscious.
- **Informality and non-standardisation:** lifelong learning in the future will be a learning method that connects or internalises knowledge from informal learning channels such as work, daily life and social activities. Such informal learning is constant and accounts for most of the learning required for an individual’s work.
- **Sociality:** learning is a process geared towards sharing and constructing individual and social cognitive networks.
- **Contextualisation:** learning is influenced by the specific context, and learners can only truly master knowledge in a meaningful context.<sup>6</sup>

In the context of new technologies, this new paradigm of lifelong learning



has become feasible. The promotion of new technologies is the foundation for the realisation of great ideas and systems. Under the new paradigm of lifelong learning, traditional learning environments such as those which rose during the early industrial era, like classroom, class and campus, will probably be surpassed, and learning will instead be omnipresent and last a lifetime. Rather than the exclusive transfer of knowledge from teacher to student, the roles will be interchangeable so that everyone will have the opportunity to be both student and teacher. In such a mass-to-mass network, the growth of an individual will no longer be linear. Instead, studying, working and living will be deeply integrated, interdependent and concomitant, forming a cyclical structure.

Under the new paradigm of lifelong learning, nobody feel that 12 years of basic schooling is burdensome. No shame will be attached to failure to enter university and, what's more, no one will be solely interested in just receiving a diploma. What people need to consider is "when to learn and what to learn". They will become interested in high-quality learning resources and new learning interactions, focusing more on learning investments and outcomes, as well as rewards. Thus, learning will become more efficient, practical and enjoyable.

Under the new paradigm of lifelong learning, new media technologies will reduce barriers to access, alleviate learning difficulties and reduce differences in students' abilities to gain knowledge, all of which make it possible for people to engage actively in learning.

### Construction of new media learning supermarket – an informal and non-standardised learning platform for all

New technologies reflect changes in learning concepts. These new concepts have had a revolutionary impact on the development and construction of a lifelong learning platform, in terms of both function and framework.

The new media learning supermarket being constructed by China Education Television is a new education media service platform and lifelong learning system with various networks, terminals and transmission paths. It is one aspect of the larger context of paradigmatic change in lifelong learning promoted by technology. It is the first new media service platform in China that employs both air and ground networks and targets developed and less-developed areas, and is particularly suitable for informal and non-standard education.<sup>7</sup>

The essential difference between the new media learning supermarket and other learning platforms is that it supports informal lifelong learning. Rather than copying the traditional classroom model of one teacher to many students, it makes possible one-to-one as well as many-to-one learning opportunities. The new learning media supermarket has taken the initiative

in putting forward some new education theories. I would like to introduce four concepts here.

- One is the **“hyperon”<sup>8</sup> learning system**, which is the core and base of new media education. It is an innovative learning system aimed at making anyone both learner and teacher.
- Another concept is the **“knowledge networks” (KNS) learning system**: like the “social networks” system (SNS), KNS, apart from interpersonal relationships, also relates to knowledge and connects knowledge with learner, learner with fellow learners and knowledge with related knowledge, thereby forming a semantic network of knowledge.
- The third concept is the **new media education resource standard**, which incorporates various existing resource standards as much as possible. Targeted at informal and non-standard learning resources, it especially requires the standardisation of fragmented resources. By standardising the resources, the system supports the uploading and sharing of information resources developed by all parties, thus forming a mass education information resource database and assuring the application and spread of the new paradigm of lifelong learning.
- The fourth is **the knowledge innovation system**: an innovative research platform. Facing various questions, people with different knowledge backgrounds will hold discussions together, collect knowledge, share wisdom and synthesise, finally leading to the generation of a new knowledge system.

The new learning media supermarket has made an innovative move to construct a network system to support universal lifelong learning in four ways.

- The first is a **four-network integration structure** with broadband satellite at its core, and including the two-way satellite network, the Internet, digital television and mobile communications network. Its ultimate goal is to become a new media platform based on education through two-way broadband learning satellite, which is integrated with several networks, to truly achieve nationwide coverage.
- The second is **the education cloud computing service** structure based on the four-network integration. To elaborate, the learning media supermarket holds the vision that “everyone owns a lifelong learning account”. Based on the cloud computing education service platform, most learning software functions and storage will be transferred to the network and the user will be able to enjoy various learning services offered by the “education cloud” through simple terminals (such as PC, mobile phone, digital TV terminal and PDA) and simple software (core components of operating system and the browser).

- The third is **the mobile learning platform** based on a four-screen integration structure: the new learning media supermarket integrates “four-screen” terminals: computer screen, TV screen, mobile phone screen and virtual screen. It supports mobile learning, and meets learners’ needs easily and flexibly.
- The fourth is to establish **an innovative, pioneering and creative development platform which integrates production, learning and research**. It will serve and instruct each individual’s development in an all-round way, so as to significantly reduce the cost of participation. The consequent increase in participation will then further aid creativity.

The new learning media supermarket has formed a comprehensive new media learning service system which integrates communities. It forms three communities: a learning and training community, a video news community and a creativity (3D) virtual community. Based on the new media education theories of ‘hyperon’ and KNS, the learning and training community offers various asynchronous and synchronous learning application services, builds the new media online learning management system, and establishes a multiple, intelligent, multi-dimensional online education evaluation system – in particular, the 3D and 2.5D virtual learning environment. By providing a lifelike visual experience, it realises various online education modes like contextualised education and interactive education, satisfying individuals’ and enterprises’ extensive lifelong learning and professional training demands. Supported by video processing technologies and novel and unique rich-media, the video news community enables great integration of video resources to offer services such as live network TV, TV on demand, live news and interactive news. The creativity (3D) virtual community offers a free imaginative and creative space, which will break the limits of space and time. People may enter the space with such questions of “why” and “what will happen if...”. They may explore their souls and questions of philosophy, create a virtual city, conduct an experiment that is not achievable in the real world, and design future scenarios.

The learning media supermarket offers services related with new media learning, including teacher training, corporate training, early childhood education, network classes, high-definition classrooms, mobile classrooms and experiments, which constitute a complete set of services for varied education. Lastly, a number of tools related to new media learning are available in the media supermarket, such as the creation, uploading, management and net communication of ‘hyperon’, all providing strong support to various education applications.

## Summary

The development of new media technology has given birth to a new paradigm of lifelong learning, of learning which occurs everywhere. In turn, this new paradigm is having a great impact on the construction of a lifelong learning platform. From a developmental perspective, the new technologies, by which we were once overwhelmed, are now at our disposal. Whether to use the new media learning platform is no longer an issue. In fact, the concept chosen 10 years ago, policy five years ago and technology three years ago determine our lives today. Similarly, choices made today will determine our lives in three and even ten years. In short, the development of new technology has made the new generation a new media generation. Close association between the lifelong learning platform and new media makes the ideal that learning should and can be enjoyed by all a reality.<sup>9</sup>

## References

- 1 Ms Kang Ning is the President of the Central Radio and TV University of China.
- 2 The new media technology platform enjoys four basic advantages in replacing the earlier distance education technology and has become the support system for growth in lifelong education. First, it is consistent with the developing trend of modern information technology, with increasingly strong performance, but lower price and smaller size. More and more new types of information terminals appear in life and the ubiquitous trend of technology in life becomes more and more obvious. The best technology is the one that is invisible in life. Similarly, the best learning is the one that is invisible in life. Second, it is consistent with the lifelong learning concept, which is for all people. Third, it is consistent with the learning method of lifelong education. It is a kind of self-learning based on individual and portable terminals. People can learn online at any time and any place. Use of a learning resource by one will not affect that of another. On the contrary, it is a kind of "Pareto Optimal" mode to share resource space. Fourth, it is consistent with the principles of affordability for the public and the maximisation of benefit. Excerpt from *System choice for new technologies to serve lifelong education during transition*, Kang Ning, *Peking University Education Review*, July 2007.
- 3 Kang Ning, "System choice for new technologies to serve lifelong education during transition", *Peking University Education Review*, July 2007.
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- 5 Yu Shengquan, Cheng Gang and Dong Jingfeng, "New explanation for e-Learning: change of network teaching paradigm", *Journal of Distance Education*, Vol.3, 2009, pp3-15;

- 6 Yao Meilin, "From cognition to context: change of learning paradigm", *Education Research*, 2003 (2): 8–12;
- 7 Kang Ning and Wang Tao, "Construction concept of new media learning supermarket for national education", *Journal of Jiangsu Institute of Education*, Vol. 3, 2008.
- 8 "Hyperon" is a learning object with meta-data coding constructed and shared by users. It can exist independently, and is used by learners; it has a certain structure and functions, through which learners can acquire some knowledge and skills, or construct knowledge. "Hyperon" itself can be modified and changed, and can also connect with other "hyperon" to form a personal knowledge network.
- 9 Kang Ning, *op. cit.*

# 18 Reflections on the value of higher education in lifelong learning

Han Yanming<sup>1</sup>

Lifelong learning is a form of social behaviour and a lifestyle and it plays a pivotal role in enhancing the quality of people's lives. Lifelong learning requires social organisation to establish fine-grained systems and mechanisms which are able to meet individual needs in terms of learning content, learning means, learning style, learning method, and so on. Higher education, in its function as the 'basic education' of modern society,<sup>2</sup> is committed to laying the groundwork for lifelong learning. In accordance with the views of Knapper and Cropley in *Lifelong Learning in Higher Education*, we regard university as not only providing opportunities for lifelong learning, but an important preliminary place for lifelong learning in other circumstances.<sup>3</sup>

## Examining the value of higher education in lifelong learning

"To remain a living organism, capable of satisfying with intelligence and vigor the requirements of individuals and developing societies, it must avoid the pitfalls of complacency and routine. It must constantly question its objectives, its content and its methods."<sup>4</sup>

In the era of the learning-oriented society, the idea of lifelong learning should be introduced into the strategy of university development. To understand the fundamental role of higher education in lifelong learning, we need to gauge its value rationally.

### *Enhancing social character*

Social character, understood as a person's essential character and attitude towards life, can be measured by their capability to handle different relations between themselves and other individuals, communities, nature and so on. In other words, it refers to the stable internalised qualities of personality,

disposition and accomplishment drawn from human cultural achievements in the knowledge-imparting process. The core of social character is learning to be, while its spirit lies in Humanism. Social character is the basic human value formed in learning activities, which exerts wide and far-reaching impact on lifelong learning.

Higher education has the venerable mission of transmitting and developing culture, promoting individual and social advancement, and offers learners a cultural environment full of rationality and humanism. Students not only acquire specialist knowledge and skills, but also learn about humanity and social science in a way which enhances their spiritual realm by encouraging them to confront reality, while nourishing their ideals and raising their spirit. Higher education plays an irreplaceable role in enhancing humanity quality.

### *Developing learning interest*

Lifelong learning expands people's learning space to beyond the university campus, creating new educational premises. Higher education is therefore not the conclusion of education, but rather a starting point. As the "producer, wholesaler and retailer" of knowledge, the university plays a unique role in knowledge creation, accumulation, transmission, dissemination and application, and as such forms the backbone of any lifelong education system and learning society.

As Knapper and Cropley claim, the majority of those receiving higher education are still traditional full-time school-leavers. It is the principle task of higher education to lay the foundation for lifelong learning in such students. Higher education makes a great impact on students' learning style and on learning content.<sup>5</sup> To meet the needs of lifelong education and a learning society, universities need to reform the traditional educational objective outlook of knowledge as "imparting to receiving" and focus instead on improving students' lifelong learning ability. As Nayman, the former assistant director of UNESCO, pointed out, learning to learn means that those educated will be able to find out what they do not know in a fast and exact way. Currently 80 per cent of the time spent in higher education is taken to impart knowledge while 20 per cent to acquire learning and research methods.<sup>6</sup> Only by forming good learning habits and motivation can students become capable of lifelong learning and sustain development in a learning society.

### *Improving pioneering ability*

A lifelong learning society going through a period of rapid scientific and technological development and social change places higher demands on higher education. Such socio-economic conditions call for pioneering students. Pioneering ability is an important part of a student's qualifications, and is regarded as "the third education passport" after the cultural know-

ledge diploma and professional certificates. Higher education plays indispensable roles in improving students' pioneering ability. At the highest level of the formal educational system, higher education nurtures the talents, pioneering ability and innovative spirit of many young students. As an important part of the recurrent education system, higher education also provides adults with re-learning opportunities, turning campuses into centres of lifelong education. At present, higher education, operating on the principle that "knowledge creates fortune and education serves society" and towards "information service and knowledge creation", makes full use of information and the application of knowledge to create an environment which fosters students' pioneering ability. To sum up, higher education is a process geared towards the cultivation of pioneering students, while helping them, as a starting point to lifelong learning, to adapt to social demands.

### *Promoting all-round development*

All-round development is the highest ideal of modern education and the aim of human self-development. Higher education is a highly effective approach to human all-round development. Learning builds wisdom, moulds morality and improves capability. The famous Chinese education-alist Ye Lan suggests: education promotes all-round development, lays a foundation for lifelong learning and development, and has further social value in enabling happy lives. UNESCO's *Learning: The Treasure Within* proposes that "education is at the heart of both personal and community development; its mission is to enable each of us, without exception, to develop all our talents to the full and to realize our creative potential, including responsibility for our own lives and achievement of our personal aims."<sup>7</sup> The key purpose of higher education is to promote human development, involving "human liberation" and "personality perfection". University with its extensive fields of knowledge and open learning spaces can offer students – besides speciality multiple learning approaches such as natural science, life science and social science – expanding fields of learning and can guide students towards knowledge fusion, and to cultivate the "all-round developed human" who is capable of putting knowledge into practice to pursue happiness. *Higher Education in Developing Countries*, by UNESCO and World Bank, points out that without plenty of high-quality universities, developing countries will find it more and more difficult to benefit from global knowledge and the global economy. The greater the number of highly-qualified citizens, the stronger the nation's international competitiveness.

### *Adjusting the higher education system in lifelong learning*

The higher education system refers to the governance system of university management and operation, which aims to develop a close and stable



relation between university and society. Against the background of current global education reform (constructing the learning society for lifelong learning), the university should not sit on the sidelines – it should be a necessity, not a luxury. However, in reality, due to systematic problems within higher education, it has not fully played its role in lifelong learning. There are serious problems with higher education as a foundation for lifelong learning. The current system is like a loaf of stiff bread, unable to bend to the requirement of lifelong learning. So, examining and adjusting the system of higher education according to the needs of lifelong learning is vital for accelerated university development in line with global reform. This adjustment can be realised through three main adjustments: adjustment of the relationships between university and government, and between university and society; and the adjustment of the university teaching system.

#### *Adjustment of the relationship between university and government*

A clearly-defined relationship between government and university is a prerequisite of an operating system of higher education within lifelong learning. The government should take charge of macro-management while the university is responsible for micro-education. Specifically, government is in charge of the following aspects:

#### **Guaranteeing educational equality**

According to the prescriptions of lifelong learning, learning is not a privilege but a right. The government should, in response to mass demand, guarantee learning opportunities for all learning groups, especially the disadvantaged. Government enforces the macro-regulations which ensure that universities educate all social members, from high-school graduates, adult learners, on-the-job professionals, to the elderly. The Government should also require universities to offer higher qualifications and lifelong education according to the specific needs of different groups.

#### **Standardising credential recognition and certificate systems**

Government should implement the credit bank system to standardise credential recognition and to grant different education certificates.

#### **Implementing an education financing system**

Government needs to increase financial grants to learners in order to ensure that those from low-income families are able to finish their education.

#### **Strengthening coordination among different departments**

The government should make full use of its resources to coordinate its relationship with universities to ensure that teaching activities in higher education are carried out smoothly.

### **Developing multiple higher education institutions**

Different higher education institutions should cooperate with each other and be flexible enough to meet the needs of social development and diversified individual learning through, for instance, establishing research-oriented universities to cultivate advanced academic research talent; increasing the number of teaching-oriented universities to foster various professional talents in different fields; expanding vocational and technological universities to offer more vocational education opportunities; establishing community universities to allow convenient education; setting up distance universities to expand learning opportunities.

### *Adjustment of the relationship between university and society*

Lifelong learning, as extensive learning at the spatial level as well as continuous learning at the temporal level, requires education to be integrated into society as a whole and everyday life, forming “a process of close interweaving between education and the social, political and economic fabric, which covers the family unit and civic life”.<sup>8</sup> In other words, education becomes a coordinated whole, in which all regional departments are united. Universities have to reform their management pattern and open up education to establish an operational mechanism coordinated with local communities. Higher education and local communities contribute to integration in a learning society, working together to bring about the local socialisation higher education and to cement education in community life.

- 1) University extensively absorbs social members through various educational forms like “recurrent education”. The establishment of a recurrent education system can attract more adult learners to re-learn on campus. Recurrent education means that one does not need necessarily to finish higher education during one enrolment, by providing part- and full-time learning options. Higher education should be open to all people, allowing periodical learning and the gradual accumulation of credits. Achievements and/or working experience outside the university should be equally emphasised or acknowledged as higher education within it. Operating according to the learner-centered ideal, university should adjust its disciplines and specialities to offer different groups different forms of education in a flexible and transparent way.
- 2) The educational resources of both university and society should be integrated and made available to all learners. University should adopt education forms which encourage students to make full use of the teaching staff, library and experimental instruments, allowing them to update their knowledge. In this way, university becomes a “nurturing garden” for lifelong learning.
- 3) University should fulfil its functions of talent cultivation, science development and social service. University needs to play an active part in

the reform and development of local economy and society, offering continuous professional instruction, employment consulting and social welfare services, which should be available to students of all ages and from various social and cultural backgrounds.

- 4) Coordination between universities, local government, employers and other institutions should be strengthened. This requires that relevant institutions trust universities to offer their working staff opportunities to learn practical courses and that institutions encourage their staff to receive university education during vacations, and to participate actively in university scientific research and social service.
- 5) Universities should completely fulfil their responsibilities as a cultural organisation and lead societal and cultural development.

### *Adjustment of the university teaching system*

The Canadian scholars Hargreaves and Fullan point out that while previous education reform focused on changing universities externally, the most important factor in reform is the internal teaching culture, centred on interpersonal interaction.<sup>9</sup> The professional development of teachers and teaching culture are associated with a process of cognition, understanding, creation and teaching essence, teaching values, teaching goals, teaching styles and the teacher-student relationship. Different teaching cultures construct different lives of the teacher and student. In the era of lifelong learning, the culture of the teaching system needs to be reformed.

### **Adjusting curriculum structure**

To improve individual self-oriented learning ability, universities should strive to establish curriculum unity and integrity among different disciplines to strengthen their applicability to life. Curriculum content should focus on learning method, and not on the style of teaching which may be compared to filling a bucket. Curricula should be designed in a democratic pattern, i.e. by experts, teachers, and students of the discipline working together. Curriculums should be arranged so as to increase flexibility of choice so that students can choose what interests them. The learning society for lifelong learning is characterised by, among other things, high occupational mobility. So higher education should equip students with what is required of them in their working lives. Universities should teach their students to be adaptable to various vocations, advanced manufacturing methods and working conditions, and not push them to a single profession. Curriculum reform and innovation can help students to increase their occupational mobility.

### **Innovative classroom teaching**

Classroom teaching should enhance students' critical thinking. We need to change old teaching ideas and reform classroom teaching methods accord-

ing to more contemporary theories of teaching. Quite a few transformations of teaching mode are required, from the knowledge-imparting mode to the intellect-developing mode, from the static and enclosed to dynamic and open, from teacher-oriented to student-centred and so on – or, in other words, from filling-a-bucket to heuristic teaching. According to the demands of teaching content, teaching conditions and special characteristics, different teaching modes can be adopted, such as discussion-based teaching methods, situational teaching methods, inquiry teaching modes, and case-based teaching modes.

### **Establishing a multiple teaching evaluation system**

In a learning society, the learner's credit and certificate cannot tell us what level they have achieved at, but only reflect what knowledge and skill they have acquired. Education evaluation should include peer-evaluation and self-evaluation, connecting learning goal and learning style, ensuring that students participate in evaluation discussions, and expand their evaluation range, and so on. Examination scores should not be regarded as the only criterion of educational achievement – other performance or project-based achievements should also be taken into consideration. Various learning achievements should be incorporated into graduation and enrolment requirements.

### **Transforming teachers' role**

In lifelong learning, teachers should be the facilitator of their students' healthy personal development, their co-learner, as well as the conductor of their students' learning and development. "The teacher's duty is less and less to inculcate knowledge and more and more to encourage thinking; He will have to devote more time and energy to productive and creative activities: interaction, discussion, stimulation, understanding, encouragement",<sup>10</sup> and "his formal functions apart, he will have to become more and more an adviser, a partner to talk to; someone who helps seek out conflicting arguments rather than handing out ready-made truths."<sup>11</sup>

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## Part IV

### Learning cities and lifelong learning

# 19 Introduction to building a learning city

Han SoongHee<sup>1</sup>

## Learning city: diverse modes

A learning city is a key step in putting the idea of the learning society into place. Also it is a mental landscape of a city paralleled with a physical landscape (Longworth 2006). More and more countries rely on the concept of the learning city to make a learning society a reality. It has many dimensions of social function with diverse layers of stakeholders. No city is the same as others in reality, and the heterogeneous figure comes from the different combinations of contexts. It seems to be a product of a synthetic art, contributed by a large number of academic disciplines, social dimensions, practices and theories.

Despite this complexity, it can be said that the 'learning city movement', if you may, seems to have three emphases. The first group represents the global association of "educating cities", based on the 1st International Congress of Educating Cities in 1990, held in Barcelona. The local governments of these cities had the common goal of improving the quality of life of their residents through their active involvement in the use and evolution of the city itself. In 1994, the movement was formalised as the *International Association of Educating Cities* at its 3rd Congress in Bologna. The official webpage states:

"...The municipal system, because of its proximity to the citizens, is the most open and the most transparent. Its decisions and its administrations are the most palpable and therefore the ones that most easily generate public opinion. It is therefore a school of citizenship."  
([http://www.bcn.es/edcities/aice/estatiques/angles/sec\\_educating.html](http://www.bcn.es/edcities/aice/estatiques/angles/sec_educating.html))

While the Educating Cities represented the 'city administration' as a clear unit and border of the movement, the second group has emerged during a

similar period, representing the corporate sector and industry. A 'City' was not the unit in this case, so was it named 'Learning Regions'. It was inspired by the concept of a Schumpeterian learning economy and by *regional systems of innovation theory*. 'Region' in this regard captures the evolution of systems innovation by the passive learning exchanges between institutions, people, or organisations that are located in *spatial proximity*. The companies, universities and research parks, according to this theory, can develop a common and occasional learning environment where knowledge transfers and transformations were freely enabled. An OECD paper states:

"Innovation systems were initially defined as national in scope, reflecting significant differences in national systems in terms of network characteristics and institutions... Institutions such as legal systems, norms and values also differ between national systems. More recently, however, considerable attention has been focused on regional systems of innovation; and it is these that are of particular interest here... Certainly, it is clear that the interactive learning which takes place within networks of organisations, is to some extent dependent upon their spatial proximity: it facilitates collaboration between firms and other organisations... Significant elements of organisational learning do take place within networks of organisations that are spatially proximate. Most obviously, spatial proximity may facilitate organisational learning through the mechanics of interaction." (OECD 2001:21)

If compared with the two origins, the third learning city model of East Asia, especially Japan and Korea, finds similarities with the European one, though with some differences: mixed but uniquely-shaped experiences. It has more emphasis more on increasing learning opportunities for the marginalised and disabled, with more focus on non-vocational programmes, using local learning centres that facilitate the local network and resource exchange. Several reasons have accelerated the movement. An ageing society is one; decreasing population is another. Adult schools bind administrators and residents together through communication; learning encourages community participation that activates the city's collective decision-making in a more democratic way. It educates the under-privileged and under-educated. In sum, the East Asian model of a learning city seems to focus more on cultural learning experiences and liberal adult education, especially for the elderly, the economically inactive, and the under-educated. It is clearly not centred on full-time workers and professionals.

In this area, the learning city programme was rather thought of as part of social welfare opportunity. It was not directly related with vocational competence development, but provided another reason to stay in the city. The newly-provided educational programmes served in diverse ways – especially adult basic education, art and crafts, literature, music and paint-



ing, sports and leisure, culture tour and exploration – and were welcomed by the old generation. Kominkan (adult education centres) in Japan and Lifelong Learning Centres in Korea, for example, played the key role in disseminating the courses and programmes. In this region, the learning city policy has never been successful in attracting big companies but still has had a huge impact on revitalising the local economy and the working population.

### Learning city towards learning society: theoretical reconsiderations

Beyond the idea of promoting learning opportunities, the learning city pursues a more active implementation of building the structural concept of a “learning society”. The main idea was based upon an emphasis that “a society should be re-wired and re-constructed in a way that human learning is put in the very front and maximised to fulfil the idea of a whole person.” Here, let me briefly explain the nature of learning city projects which promote the idea of a learning society.

The learning society as an idea stands on the main assumption that a society is basically a ‘complex system’ that grows by self-organising processes, where human learning is the DNA of growth and change. It presupposes a link between learning and social development, but unlike the previously simple model of ‘development education’ that has prevailed for several decades. The previous model of community development appears similar to the idea of learning city but simply deals with education as an instrument to rebuild the community. The learning city idea is and should be different from the instrumental model of education.

Education is not an instrument which can be invented one night to be deployed for external purposes. It rather is “a complex adaptive system” that evolves with time and self-organises for internal purposes. The learning city introduces a network model in organising educational institutions and resources. Traditionally, especially in East Asia, a hierarchical model prevailed as the dominant mode of educational supervision, in which the Ministry of Education supervised Provincial and local District Offices of Education, and schools are supervised under a hierarchical tree system. It was a typical top-down model. On the contrary, the learning city organises the scattered educational resources as a network-type communication channel by which heterogeneous sources of information, experts and education programmes are inter-connected on a learning city platform.

I believe that the learning society accompanies an elaborated learning ecosystem. An educational environment cannot be invented, but cultivated with time. An education system in this vein is also a part of a ‘complex adaptive system’, which cannot be reduced to separate elements or parts, like primary education, secondary education, adult education, or vocation

training, schools, teachers, textbooks, and so on. All are co-related and connected to make a whole complex ecosystem of human learning. It is like a human body which cannot be detached from other parts. If so detached, the human simply dies. Likewise, education dies if the parts are separated into separate pieces. Lifelong learning is an idea that learning in a society needs to be correctly connected, circulated and functioning for the whole to function. Like a living body, the sub-components combine to give it life. Likewise, a learning city is a living environment in which lifelong learning can be planted to make a forest of learning.

In this sense, the idea of 'learning society' includes a new organic approach to understand the nature of education and society. Putting it another way, a learning society is one in which learning functions as a key attribute and defines what the society should be; it is a society which is equipped with a learning system as a key apparatus of social production and reproduction; it is a society where any mode of learning becomes a key DNA in the organ of the social structure; it is a society that requires a learning system as a prism that helps us understand the nature of the society. In sum, a learning society is a self-organising emergence in society where new patterns of social fabric and learning systems are merged and deployed. Here my point is this: a learning city is not just an old-timer's economic project, but a whole new idea where new learning system emerges, revolves, and grows to lead economic, social, and political development as a whole.

A learning city is like cultivating a forest of learning systems, which needs patience, systems thinking and collective minds. "Systems thinking" is a keyword, if we consider the learning cities model as a city development strategy for the next generation. A learning city is a multi-purpose, multi-dimensional strategy that requires an education and learning system as a key aspect, where learning is considered an authentic and generic DNA for cultivating the post-industrial society as a complex adaptive system. In this vein, systems thinking is the key mode of planning and implementing the whole situation in action. The old-timer's linear model of thinking cannot lead the complexity of learning cities and learning societies.

## The Korean experience revisited

Let me briefly introduce the Korean experience of learning cities over the last ten years. After the Lifelong Education Law was enacted in 1999, the Korean government immediately began to put the idea into practice. Following some groundwork, the first 'official' learning cities were selected and announced. Since then, well-planned and elaborated policies have led the whole procedure. Some implications will be presented here.

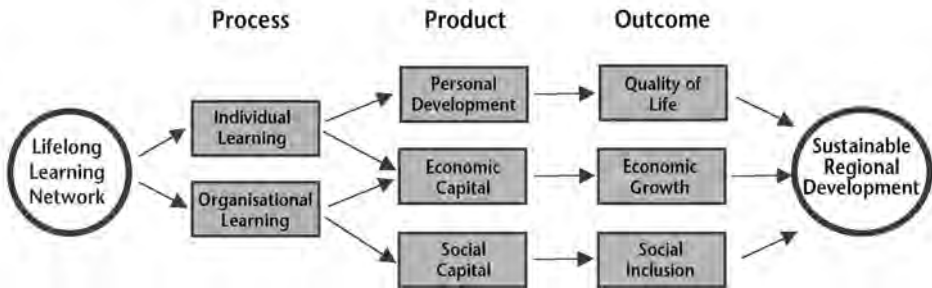


Figure 1 Process, product and outcome of LLC (NILE)

### *Meaning and legal basis of a lifelong learning city*

A 'Lifelong Learning City' (LLC) has been the government's long-term project for promoting learning cities in Korea since 2001. According to the National Institute of Lifelong Education, it implies "*a social restructuring programme to build a learning community where everyone learns whatever and whenever they want, by means of supporting personal development, social inclusion and economic competitiveness, which eventually accomplish individual well-being as well as the total competitiveness of the city*" (see Figure 1).

The LLC policy is stipulated by Lifelong Education Law, Article 15. The Law states that the "government can designate and support selected municipalities, districts, and counties as lifelong learning cities. The National Lifelong Learning City Council can be organised in order to help in networking and promoting collaboration between lifelong learning cities."

The LLC policy has two legal bases, one of which are the central regulations, such as the Lifelong Education Law and the dependent actions such as long-term plans and NILE policies. The other is the ordinances of the 'cities'. Indeed Korean lifelong learning policies, generally speaking, are centrally-planned and locally-managed. The National Institute of Lifelong Education (NILE), with regional and local hierarchies of the administrative system, designs most of the policies according to the five-year General Plan for Lifelong Learning Promotion and carves the details of the policy designs, implementations and evaluations of LLC. The other legal basis is formed by the local ordinance and subordinate regulations. However, LLC by nature is the local city's business, carried out with consultation and direction, and sometimes evaluated by the NILE. LLC in this context can be said to be the connecting bridge between the central and the local in adult learning and education.

Several key policies in most LLCs are as follows:

- 1) Establishing the management and implementation system, including ordinance, major department-in-charge, hiring experts, information-sharing systems, financial plans.
- 2) Expanding educational programme provision in diverse aspects by life-stages
- 3) Developing special programmes for marginalised and disabled groups, for social inclusion and social capital, especially for the elderly and unemployed.
- 4) Developing networks between institutions, organisations, experts and other resources.
- 5) Recognising and validating learning outcomes as equivalent to formal education outcomes.
- 6) Building trans-departmental collaborative frameworka, especially between social welfare, employment and learning as the basis of local needs.
- 7) Promoting learning cultures, learning festivals and awards.

### Procedure

The LLCP was launched in 2001 with three pioneering cities selected as the first Korean Lifelong Learning Cities. By 2008, a total of 76 local governments (municipalities, city districts and rural counties) were designated as lifelong learning cities, about one third of the total 234 local governments nationwide. As seen in Figure 2, the cities are geographically evenly distributed, with some concentration of satellite cities around two biggest Metropolitans in Korea, Seoul and Pusan.

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**Figure 2** Distribution of LLC (the dots represent a total 76 learning cities)

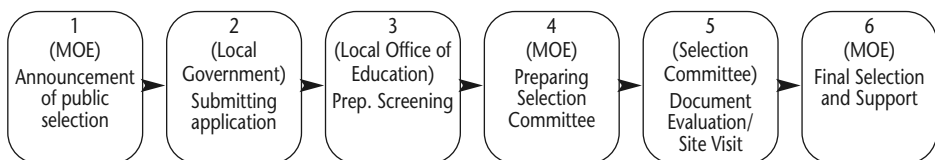
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Although the term ‘city’ is applied, it refers to first-level administrative units of communities in a diverse way, including urban cities, autonomous districts in a metropolitan city and rural counties in a province, all representing the ground level of social community in the administrative hierarchies. It might be helpful to add an explanation about the local government structure. The Korean local administration has triple layers: national government, provincial government and local government. Before 1995, local governments were run directly by provincial governments, which were also appointed and operated by the national government. However, since 1995, a degree of local autonomy has been restored, and provincial and local governors and assemblies were elected in general elections. The period of LLCP since 2001 was coincidentally paralleled with the period of looking for a new paradigm and policy frameworks for local governance and civil society. Korea has 16 provincial-level governments (one Special City, six Metropolitan Cities and nine Provinces), which govern 232 local level governments, which include municipalities, districts and counties. Municipalities are smaller cities; districts are administrative parts of the Metropolitan Cities that have autonomous administrative authorities, while counties are the parts of Provinces that represent rural areas. The LLCP is designed for the three types of local level government

The selection process is as follows. First, the Ministry of Education invites new participation each year and evaluates the documents submitted. Through site inspection, the final winning city is selected (detailed procedure is as in Figure 3). Second, 2 billion won is provided to each city, while the selected cities also match with the same amount funds. Third, each year extra programme budgets are provided on the basis of public competition, such as Excellent Lifelong Education Programmes, Literacy Education Programmes, Weekend Education Programmes and Underprivileged Group Support Programmes. Fourth, periodic nationwide evaluation and policy consultation procedures are provided to maintain quality.

### Progress

The LLCP has been followed according to the grand picture drawn by NILE. The *first five years* (2001–2006) has been marked for laying the fundamentals, including the construction of infrastructure, e.g. local ordinance to promote local lifelong learning, setting the responsible administrative body, recruit-



**Figure 3** LLC selection procedure

ing experts, constructing councils. The *next five-year period* (2007–2012) is intended to promote appropriate educational programmes and learning support networks, effective for local conditions and needs. The *planned vision after 2013* focuses on developing and stabilising the localised human competence development systems that produce the proper outcomes of the LLCP in general. For the whole period, the Ministry of Education conducts outcome management, e.g. monitoring and outcome assessment, based on residents' learning satisfaction and systems successfully created.

However, the major idea of LLCP is that it is eventually not what the central government controls but more dependent on the local government's contexts and tasks. While central government provides key factors for successful launch, local government takes the major role according to the local context. A key obstacle in this is that local administration officers are short of experience in learning management, since the learning issues had not previously been a central part of local administration. Therefore, for the first five years, many local governments had to rely on the national government and external experts in lifelong learning management.

The primary result of the LLC intended is an increasing number of educational programmes provided, by creating a universal network that mobilises local learning resources scattered within the city borders into a loosely inter-connected virtual campus, which includes lifelong learning centres, local libraries, culture centres and theatres, social welfare centres,

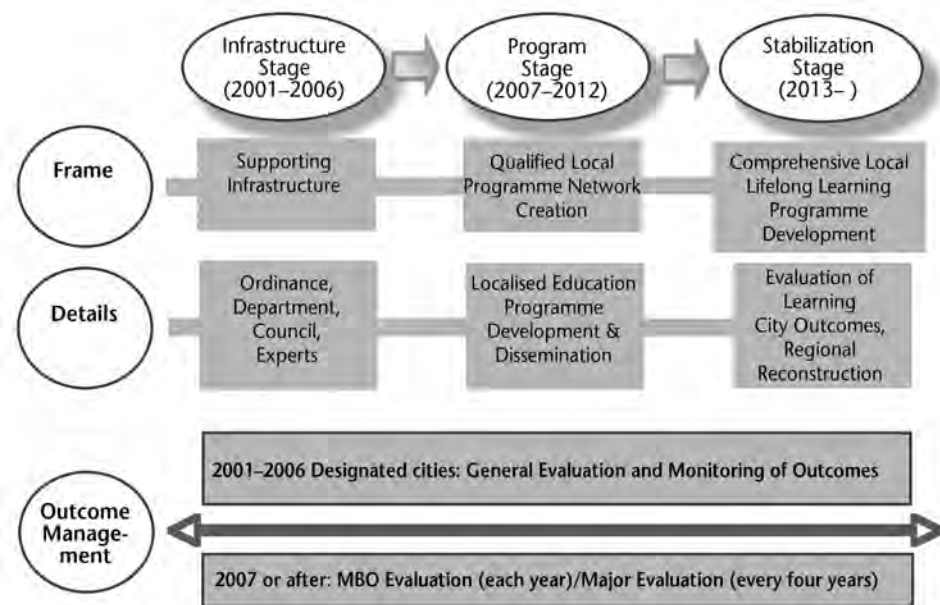


Figure 4 Long-term plans for LLC

vocational training institutions, and so on. The consolidation of the scattered learning resources, however, has progressed to make a meaningful evolution in the scheme and vision of LLC: from simple provision of adult education to creating a vision of making the community a learning society. City managers came to understand that a creating 'learning city' does not only mean providing more education and learning, but also reconstructing the city in a smarter and more communicative way among residents. (See SHOWCASE)

**The following two cases have been presented in the National Report for CONFINTEA VI**

**Example 1: Haeundae-gu Bansong district**

Haeundae-gu Bansong district is one of the poorest areas in the metropolitan city of Busan. In this poor situation, some community members organised a group called "People who love Bansong," and started activities to build a more sustainable community. This activity expanded through being linked to the government-led Lifelong Learning City Project. Programmes for understanding the Bansong community and resident autonomous schools also began to operate. Furthermore, residents who participated in the community building activity organised a study group, Learning about our town, Bansong, so that community members could increase their pride in their community. This study group also has practised volunteer services such as offering community courses in elementary and middle schools. Recently, in order to run this study group on a regular basis, participants in this study group established the Store for Sharing Happiness, in which donated items are recycled. They utilise its earnings for child support projects. Additionally, they ran a campaign to raise funds to build a library for children in their community and erected the Hope Library in late 2007. These achievements are the result of residents' solidarity, over 10 years of engaging in community.

**Example 2: Chilgok County in Gyeongsangbuk Province – Lifelong Education College**

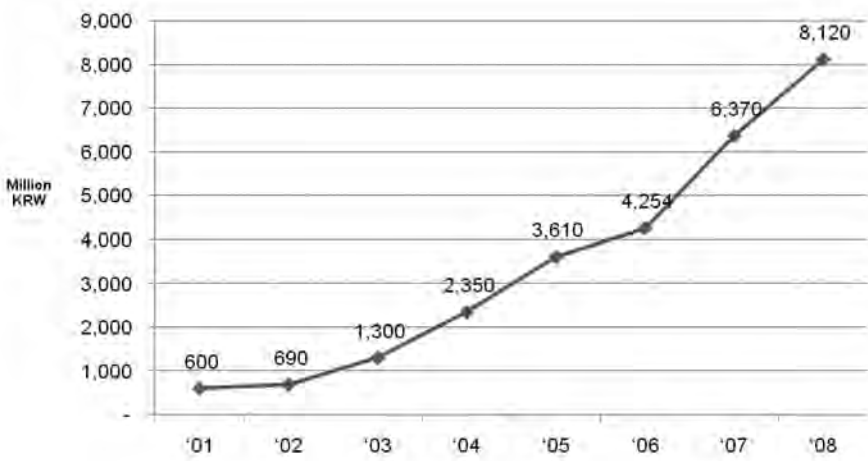
Since selected as a lifelong learning city in 2004, Chilgok County in Gyeongsangbuk Province created the Academic Credit Bank System curriculum, run by the central government. Chilgok County has operated this curriculum under the name of the "Chilgok Women's Agricultural College" in partnership with the neighbouring Kyungpook University, and has established the first Women in Agriculture Management course in Korea. In 2004, 40 women in agriculture enrolled in this curriculum. In 2005, 12 independent courses were accredited as Academic Credit Bank System subjects, which enabled the college to operate two specialities. This illustrates that it became possible to operate a college degree curriculum equivalent to that of the traditional college. Therefore, the Chilgok Lifelong Learning College, which was the first lifelong learning college established in the world, now has 360 students enrolled and attending lectures in 12 courses. In 2006, 14 students obtained a college degree, and five finished the entire course of study. Four out of 14 graduates have transferred to four-year colleges, and the remaining 10 graduates have been admitted through examination into four-year colleges. As of 2008, 36 courses were accredited as Academic Credit Bank System courses and all of them are certificate-related courses.

Many indicators show the growth in volume and quantity. For example, the total budget over the eight years (national level only) has reached 27 billion KRW (about US \$23 million). Local government also has spent the same amount or more as matched funding, and therefore the total budget combining national and local levels reaches some US \$50 million. It is not a large amount of money, but neither a small amount at all.

**Table 1 LLC budget (National government, MOE)**

(unit: million KRW)

Classification	2001	2002	2003	2004	2005	2006	2007	2008	Total
Total	600	690	1,300	2,350	3,610	4,254	6,370	8,120	27,294
New Cities Subsidies	600	600	1,000	1,600	2,800	3,000	3,800	–	13,400
Continuing Subsidies	–	–	–	–	–	–	–	3,800	3,800
Qualified Educational Programme Support	–	90	300	750	750	644	1,435	2,287	6,256
LLC Consulting Project	–	–	–	–	60	300	200	150	710
Learning Outcome Standardisation	–	–	–	–	–	280	280	500	1,060
Networking	–	–	–	–	–	–	625	1,153	1,778
Administration and Operation	–	–	–	–	–	30	30	230	290



**Figure 5 Total amount of national government funding for LLC**



It is not easy to provide evidence of the outcomes concerned. Input factors are easily compared, but outcome factors are still difficult to quantify. Learners' satisfaction surveys are sometimes used as an outcome indicator, but it does not seem appropriate to represent the quantified objective standard. Others use building infrastructure (seen as in Table 2), showing that more 'cities' are building their regulations, expertise and information systems. The growing number of participating cities in itself shows that the LLC project generates energy and effectiveness, shown by local voting patterns and election campaign pledges.

### Reflections: "New model in education, new change in city"

To speak broadly, the 'education system' in Korean society has been split across the boundaries of the local administration system. While local government has managed most of the social apparatus, schools were not included. Local Offices of Education that supervise individual schools were separated from local politics, directed exclusively by the provincial Office of Education. It was the Ministry of Education that controlled the hierarchy of the Office of Education. The most important contribution of LLCP, in this sense, was to help people to re-think the nature of education, although still not adult education at this time, as an integral part of local governance. It

**Table 2 Increase of LLC infrastructure among 19 cities selected in 2004**

		2004 (A)	2007 (B)	Increase (A-B)/A×100
Dedicated Directing Government Body	Cities that have dedicated organisation	52.6%	89.5%	70.2%
	Number of Cities that have a dedicated 'Department'	5	7	40.0%
	Number of Cities that have a Dedicated Team	5	10	100.0%
Number of Dedicated Officers (total)		89	164	84.3%
Number of Facilitators of Lifelong Learning Centres (total)		83	94	13.3%
Number of Cities that have LLC charters or ordinance (%)		89.5%	100.0%	11.8%
Number of Cities that have official LLC webpage (%)		94.7%	100.0%	5.6%
Number of meetings, LLC council		16	31	93.8%
Sample survey of 19 cities that were selected in 2004				

was a valuable contribution of LLC that local governments were deeply involved in the design, management, and provision of educational programmes and services, especially crossing over boundaries between labour, welfare, culture and education to meet residents' desire to learn through joint provision. It was a small but significant movement forward to the 'learning network model', pursuing the greater vision of a 'learning society'.

Several other meaningful changes can be also observed from the City Administration side.

First, the focus of city administration shifts from building physical hardware infrastructure to building mental software conditions for human well-being. It comes with the emergence of local self-governing from 1995 that each province, district, or municipality creates its own unique living conditions and environments for residents, not only cement and roads but also collectively-enriched minds, participation, new awareness, and so on.

Second, the basic social welfare system has been expanded to the level of cultural and mental welfare. From 1980 the basic social welfare system has begun to take care of people who live under the minimum wage or with no earnings by providing them conditions for minimum survival. Learning and culture were now thought to be the next step for further welfare support. People began to realise that dignity can help people back to the workplace, and can be supported not only by bread and shelter but also by learning about literature and art.

Third, citizens began to sense a changing atmosphere that education is not just about providing educational programmes, but also about nurturing a whole-city environment where provision and participation are organically inter-connected across the full learning ecosystem. Now city administrators' top priority has changed to the consideration of education and learning.

Fourth, by considering diverse institutions (libraries, culture learning organisations, local colleges, lifelong learning centres, social welfare centres) local governments learned that the most effective management tool for providing the programmes is to create a learning network and by collaboration. It helps to avoid repetitive provision by several institutions, and fill in the needs gaps. Long-term general plans and coordination are necessary to synergise the fragmented system.

Finally, the sources of budgets are separated by government divisions (for example, the Ministry of Culture gives money for cultural programmes, while the Ministry of Social Welfare provides funds for education for elders, and so on). Local government should have a policy tool and scheme under which the various budget sources can be coordinated and restructured to meet local needs. There is also a need for monitoring and feedback. A hub system has to be invented at local level, which was definitely within the model of LLC.

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# 20 Constructing a learning society for 'better city, better life': Shanghai's experience

Li Junxiu<sup>1</sup>

Shanghai is located on the bank of the Huangpu River. It was the origin of the country's industry. Early in the mid-19th century, Shanghai became a prosperous port where domestic and foreign merchants gathered. Nowadays, Shanghai is a new-type metropolis which demonstrates the success of reform and openness.

This paper covers, in three sections, Shanghai's endeavours in recent years to construct a learning society: first, the background and conditions; second, our efforts and achievements in the past decade; and third, reflections on the Shanghai experience and future plans for the further promotion of lifelong learning in Shanghai.

## The background and conditions of building a learning society in Shanghai

In 1999, Shanghai took the lead in building a learning society in response to the acute need for economic and social reform and development, citizens' learning demands, and the spreading influence of international thought on lifelong learning. Overcoming the limitations of school education was also an important breakthrough.

First, rapid economic development placed new demands on the types of human resource supply and occupational competencies of the workforce. From 1999 to 2009, Shanghai's per capita GDP increased by almost 160%. The workforce increased by 2 million. The proportions of major industries have been greatly changed. The speed of growth of information technology has accelerated. There is now greater demand for skilled professional talent, which is prompting the government to promote workplace learning for employees, to improve their occupational competences, information skills, innovative and adaptive abilities.

Second, the acceleration of modernisation led to rapid increases in the migrant population, which accounts for one third of the total population of Shanghai. In order to integrate themselves into urban life, migrant workers require urgent improvements to their occupational skills.

Third, population ageing in Shanghai seems to have become much faster. The population over 65 years old – who have diverse and individualised learning needs in healthcare, daily life skills, law, culture, and so on – has risen to 2.2 million,

Fourth, because citizens' living standards have significantly improved, their patterns of consumption have also drastically changed. Over 80 per cent of residents put culture and education as their primary consumption in the future.<sup>2</sup>

All the trends mentioned above have created new challenges and opportunities for the development of lifelong learning in the city.

## Practice and exploration in constructing a learning city

The main purposes of building a learning society in Shanghai are to provide abundant learning opportunities for every adult resident as the basis for equal competition, to contribute to everyone's overall development, the economic growth and harmonious development of the society, and to complete a preliminary framework to meet the demand that 'everyone can learn, anytime, anywhere'. To achieve this goal, we focus on the following efforts.

### *Constructing a lifelong learning system to offer various lifelong learning opportunities to residents*

With the participation pattern known as 'government-driven, social sectors participate', Shanghai has constructed a lifelong learning service system based on its rich educational resources. The system consists of three categories of institutions.

The first includes various adult education institutions which usually provide school education at secondary and higher levels, and vocational training for young adults.

The second consists of a widespread three-tiered community of education institutions at district level, street level and neighbourhood level, known as community colleges, community schools and community learning sites. The colleges (schools and sites) are usually financed by district and township governments according to the community's resident population. These kinds of institutions provide abundant learning activities, including cultural education, vocational training as well as learning activities for healthcare and sports.

The third is the system of workplace training and learning for employees.

Nowadays, various major trades and large to medium-sized enterprises have established training centres, which form the basis for constructing learning organisations and are responsible for employee training and job skill improvement.

### *Formulating a comprehensive and trans-departmental management mechanism*

For governments, one of the difficulties in promoting the construction of a learning society is the formulation of a comprehensive management mechanism that can coordinate all levels and kinds of education and learning resources, and that can realise the planning, implementation and management of the learning activities of the whole society. After many years' exploration, Shanghai has created a relatively effective and comprehensive mechanism. The municipal government established the Shanghai Advisory Committee for Learning Society Construction whose main duties are planning, guiding and coordinating. The Committee has a promotion 'office', which is attached to the lifelong learning division of the Education Commission. It cooperates with Shanghai Distance Education Corporation in building the Shanghai Service & Supervision Centre for Learning Society Construction, whose function is to assist the 'office' with responsibilities such as guidance, supervision, inspection and evaluation, in order to improve the quality of lifelong education and learning society construction. This kind of mechanism, joined by governments at all levels, has avoided the traditional disadvantages marked by segmentation in management, and has finally formed the joint forces necessary to promote the construction of a learning society.

### *Branding residents' learning activities and cultivating a rich lifelong learning culture*

The concept of lifelong learning calls for 'learning that blends into daily living, and penetrates into social life' and helps residents to recognise learning as part of their lifestyle. Based on rich learning and cultural resources, a series of residents' learning activities – such as a reading festival, book fairs, a lifelong learning week, a community culture and art exhibition, network learning and communication, a scholars' forum, and a handiwork competition – have been planned. These lifelong learning activities have become flagship brands of Shanghai's learning city construction, attracting and encouraging residents to take part in lifelong learning, cultivating a rich learning atmosphere, and helping people realise that learning is not only a matter of 'student and teacher', or something represented only by certificates and degrees. Residents in Shanghai now believe that 'everyone can be a teacher', the 'classroom is everywhere', 'learning is development' and 'learning is life'. Activities like these remain popular because they help residents feel the charm of knowledge and illuminate their enthusiasm for learning.

### *Establishing an IT platform for lifelong learning to satisfy the learning demands of all citizens*

Shanghai has kept up vigorous efforts towards the establishment of an IT platform, and has made great achievements in three projects. The first project was the establishment of a satellite networks platform for lifelong education, which has set up a resource repository containing a great number of excellent curricula. This satellite platform broadcasts educational programmes for 8 hours every day, and delivers a significant amount of educational video material to sub-districts and communities, which helps citizens there to enjoy the learning service in their own communities. The second project was the creation of the Shanghai Lifelong Learning Network in 2009, which interconnects all levels of the lifelong education system. The third was the establishment of the joint development mechanism for web resources, which encourages diverse social forces to work together in developing learning resources and in building a database for lifelong learning. In addition, the Network has gradually established a variety of online learning modules, provided platforms for interactive discussion, and carries out activities such as sharing learning outcomes, promoting lectures and so on, in order to create an atmosphere of self-directed, flexible and happy learning.

### *Paying close attention to the demands of special social groups in order to construct an inclusive lifelong learning system*

Lifelong learning should enhance human development and fulfil the function of social inclusion. For this reason, Shanghai made a great effort to formulate various training mechanisms and provide learning opportunities for different special social groups (such as laid-off workers, migrant workers, disabled and older citizens) to satisfy their special learning needs. This mechanism is under the unified leadership of districts and counties, is implemented by villages and towns, and is a venture in which various social organisations participate. To meet the learning needs of the increasing population of older people, we mainly take advantage of the community learning network and the college for older people to provide various curricula and learning activities.

## Reflections and prospects

A reflection on the efforts of the past decade in constructing a learning society in Shanghai cannot neglect the following three key issues: how to create legal support for lifelong learning, how to establish articulation between various lifelong learning institutions, and how to galvanise various social forces. In the future we will put more focus on the following three aspects.

*To formulate regulations for lifelong learning and to ensure the legal status of the lifelong learning system*

Shanghai will formulate local regulations for lifelong learning, which will clarify relevant rights, obligations and duties of social institutions (e.g. government and enterprise) and individuals. These regulations will also integrate the various responsibilities of different government departments, including education, science and technology, human resources and social security. Lifelong learning will be funded by the government, enterprises, institutions and individuals. The sound development of a learning society – from the multiple perspectives of, for example, finance, human resources, implementation organisations, the recognition of learning outcomes – is ensured by granting legal status to the lifelong learning system.

*To build 'Shanghai Open University' and 'learning overpasses' among various types of educational institutions*

Shanghai is making preparations for the establishment of Shanghai Open University, which will integrate various lifelong learning resources. In the start-up stage, Shanghai Open University will be mainly composed of the Shanghai TV University and part-time colleges, community colleges and the Staff College. We will further build various 'learning overpasses' within the education system which will provide academic credentials through the establishment of a credit bank, a learning outcome recognition mechanism and a citizen's learning record card so as to provide open, connected, convenient and alternative learning opportunities for our citizens. In addition to formal education, we will provide a more inclusive lifelong learning system and platform to every citizen.

*To galvanise various social forces and enable them to play significant roles*

The construction of a learning society brings fundamental, systematic and complicated social change. It requires not only excellent political wisdom and governmental support, but also a joint promotion model which engages the government, enterprises, educational institutions and non-governmental organisations, as well as individuals. We will also support universities in establishing lifelong learning programmes, to cultivate lifelong learning professionals who can provide human resource and research support for the promotion of lifelong learning and the learning society.

We believe that social progress should not only be measured by material accumulation and by economic growth, but also by the spiritual horizons of a city and by the improvement to people's lifestyles. We are convinced that constructing a learning society will be beneficial to our citizens, enabling them to live meaningful and spiritual lives and to improve their character. It will also help to maintain Shanghai's developing advantages. In a nutshell, the construction of a learning society will make a great contribution to



realising the motto of Shanghai World Expo 2010: "better city, better life".

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# 21 Development of lifelong learning and promotion of the construction of a learning city in Changzhou

Ju Liqin<sup>1</sup>

A learning city is a city committed to the ideology of lifelong learning: learning becomes part of its citizens' lives. Such cities are able to guide and meet the multidimensional needs of the public with regard to lifelong learning, and establish a lifelong learning system.

Changzhou, or the Dragon City, is a city of culture with a history of more than 2,500 years. It is also a central city in the Yangtze River Delta with scientific and coordinated development, and has achieved considerable progress since reform and opening to the outside world.

As early as 2001, the city took the initiative in pressing forward with its construction as a learning city. Since then, the city has gradually developed its educational ideology to combine education with lifelong learning and social participation. It advocates for the connection and co-existence of lifelong learning and social development. In the process of promoting the construction of a learning city, the development of lifelong learning has become central to education.

## The government's role in promoting lifelong learning

The *Education Law of the People's Republic of China* states that "to meet the needs of developing a socialist market economy and promoting social progress, the State carries forward educational reform, fosters coordinated development of education at various levels and of various types, and establishes and improves a system of life-long education" (Ministry of Education, 1995). From this law, we can clearly see that the government should be the principal body in the construction and perfection of a lifelong learning system. At present, however, apart from some research institutions, the national government has not established any special body with regard to lifelong learning, and most provinces, municipalities and autonomous

regions have no such bodies to promote the construction of a lifelong learning system. This is an issue that demands immediate resolution. The construction of a lifelong learning system represents a huge task of social engineering which will involve people of different backgrounds. As such, it should be planned, administered and integrated by special organisations on the basis of relevant laws and regulations.

Since 2008 Changzhou City has made attempts to construct a system of “lifelong learning joint conferences”, which has been attended by 14 units and departments including the Bureau of Education, the Bureaux of Human Resources and Social Security, and the Bureau of Civil Affairs. These conferences have proven to be an effective mechanism in the coordinated promotion of systematic research, creation of mechanisms, advocacy of ideology, early years educational development, and education for older people, which are all issues central to lifelong learning. Nevertheless, with regard to incentives for continued learning, issues such as the accreditation of learning and the construction of linkages between degree-awarding and non-degree-awarding education should also be settled.

## Enhancing the quality of community learning

Community learning, as the foundation of and a support to lifelong learning, is internationally regarded as one of the most important means of promoting the construction of a lifelong learning system, as well as a bridge to a learning society. Developing community learning will help to enhance the attractiveness of learning-related activities to community residents. Furthermore, it will enable community learning to keep pace with the times, and satisfy participants’ ever-increasing learning needs. As such, it is understood to be both a fundamental and persistent project.

At present, the most important task in raising the quality of community learning is infrastructural development. In some provinces or municipalities in China, entities such as community colleges and community learning centres have been established, but problems still exist. Staff and management lack the proper professional expertise – partially, if not totally. In addition, they are badly in need of support and guidance relating to the urgent needs of community residents for multi-dimensional and individualised learning. Taking these problems into consideration, Changzhou has made efforts to set up a community university based on the city’s Radio and TV University. It has formed a preliminary four-level community learning network:

- the city with its community university;
- districts with their community colleges;
- townships or urban neighbourhoods with their community learning centres; and

- villages or urban residential communities with their community schools.

Thus, the community university not only leads in guiding the development of community learning, but also functions as the city's "lifelong learning research centre," "lifelong learning guiding centre," and "lifelong learning information centre." In Changzhou, the community university has played a crucial role in training, coordinating, planning, guiding, service and discovering curricular resources. Owing to the involvement of the community university, relationships and exchanges between different communities have been enhanced. The interchange network of community learning gives residents access to learning resources at various levels and to courses offered in districts other than their own. As a result, community learning has made rapid progress and residents are even more enthusiastic about learning and study than before.

## Reforming school education

In *Learning to Be*, Faure (1972) suggests that school, an institution designed for the systematic education of the young generation, is a significant factor in the cultivation of people who make contributions to social development and who play an active role in life, and in training them to make appropriate preparation for the work they are going to take up. School education at the elementary levels lays the foundation for lifelong learning. But at the present time, school education in China, especially at elementary level, is more or less examination-oriented, and places too much emphasis on examination preparation, which runs contrary to both the students' desire to learn and the cultivation of good learning habits. In order to change this situation, we feel that school education is badly in need of reform which will gear it towards cultivating pupils and/or students into lifelong learners, so that they can lay a solid foundation for their further study in the years to come. In recent years, elementary education in our city has centred upon students' competence in autonomous learning, which has been achieved by changing teachers' classroom practice and by curricular reforms. In addition, we have also taken successful approaches to the development of students' interest in ways of learning.

### *Creating learning activities*

Learning needs vary. Some learn for leisure and entertainment; some for technological support; some for stimulation, some for information, some to acquire knowledge, and others for aesthetic purposes. That is, people's differing needs for learning reflect obvious differences in levels and inclinations. As it stands, many adults lack motivation for further learning. Therefore, it is important that the government helps residents to develop a lasting

enthusiasm for learning. There are many ways of doing this. For instance, Shanghai and Shenzhen host Reading Festivals, and in Changzhou the “Dragon City Forum” is another influential social learning activity. The forum room can house more than 1,000 people, and there is never an empty seat. Apart from this, we also run the Women’s Career Initiative Training Programme in connection with local enterprises, the “Science Popularization Programme” in connection with farmers, the “Morality Lectures” in connection with urban communities, and the annual “Activity Week of Lifelong Learning for the Public”, all of which have helped to create a favourable atmosphere to stimulate effective learning in the city.

The 21st century is an era of knowledge innovation, and knowledge is profoundly changing the economic and social life of the city. The momentum for the development of a city comes from knowledge. A city’s comparative advantage comes from its creativity, and from the vigour and vitality with which it maintains its development by the timely updating of the knowledge base of all its residents. Changzhou will continue to make further efforts in improving its lifelong learning system, to implement better mechanisms, cultivate a better atmosphere, and contribute to the construction of a learning society in which all people want to learn, and all people learn whenever and wherever they want to learn.

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- 1 Ms Ju Liqin is the Vice Mayor of the Municipal People’s Government of Changzhou, Jiangsu Province of China.

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## Part V

Rural and industrial  
development and  
lifelong learning

# 22 Lifelong education of farmers in the context of coordinated urban-rural development in China

Hong Fuzeng<sup>1</sup>

Document No. 1 of 2010 of the Central Party Committee and the State Council stated that the coordinated development of urban and rural areas is the fundamental requirement of the all-round construction of a better-off society. Coordinated development of urban and rural areas is an important strategic decision made in line with the characteristics and sharp contradictions of social-economic development at present in China. In terms of its connotation and essence, the coordinated development of urban and rural areas is to transform the urban and rural two-tier economic system and to realise coordinated development in which urban areas will lead rural areas, industry will support agriculture and urban and rural areas are integrated.

Farmers are at the core of the issues in the development of agriculture and rural areas, and fully tapping the enthusiasm and innovation of farmers and stimulating their potentials is essential to realising the coordinated development of rural and urban areas. Developing farmers' lifelong education, improving their competences and nurturing a new type of farmers who are educated and have acquired technologies and operational skills has an irreplaceable role in promoting industrialisation, urbanisation, agricultural modernisation and the ultimate realisation of the integration of rural and urban areas.

## The significance of developing farmers' lifelong education in coordinated urban-rural development

The term "lifelong education" originated from Paul Lengrand (1985), a well-known French adult educationist. The lifelong education that he referred to was a concept of learning at various stages of life, including all formal, non-formal and informal learning. Lifelong education gradually became the

mainstream education ideology and generated a far-reaching impact on education and society in the world.

The *Outline of National Medium and Long-term Plan of Education Reform and Development* (2010–2020) highlighted the strategic objectives of “establishing a well-fitted system of lifelong education” and “promoting that there is education for the people who want to learn, people who have learned can achieve something and what is learnt can be used” (Ministry of Education, 2010). In order to realise this objective, it is necessary to deliver lifelong education to farmers who make up the majority of the population of China. It can be said that the education of farmers is an indispensable component of the lifelong education system and an important avenue to realise the objectives of constructing a better-off society.

*Developing farmers’ lifelong education is the main task and most important means of rural reconstruction*

The primary task of rural reconstruction is gradually to transform traditional to modern agriculture with sustained market competitiveness and to realise sustained income growth for farmers. Traditional villages in rural areas will be transformed into new modern communities. Traditional farmers will be nurtured to become a new type of farmer with education, technologies and business skills. The nurturing of a new type of farmers is not only a basic task, but also an important means of rural reconstruction. To realise this objective, we must promote continued education and deliver lifelong education to farmers.

*Developing farmers’ lifelong education is an important measure to increase overall agricultural productivity*

Overall agricultural productivity consists of multiple elements, including the supply and guarantee of production elements, technical backstopping, production organisation, market operation, institutional guarantee and risk resistance. These six aspects are closely related to the quality of agricultural labourers. From the perspective of technical support, the quality of farmers determines their attitude towards and the capacity to absorb and use new technologies; it directly influences the adoption and diffusion of scientific and technological innovations. Developing farmers’ lifelong education is a key means of increasing overall agricultural productivity.

In addition, the organisational capacity of agricultural production, the operational capacity of the agricultural products market and the capacity of agriculture in resisting adversities are all closely related to the comprehensive quality of agricultural labourers. Therefore, vigorously developing farmers’ lifelong education and providing them with agricultural science and technological training are effective methods of increasing overall agricultural productivity.



*Developing farmers' lifelong education is a strategy that can address the issues of farmers' income growth from the roots*

The relationship between farmers' quality and income is reflected as follows: (i) the quality of farmers has a direct positive impact on agricultural labourers' production efficiency and on farmers' income. High-quality farmers have a strong awareness and capacity to adopt new technologies and modern agricultural facilities; (ii) the quality of farmers directly impacts on their capacity to engage in other enterprises or in secondary or tertiary industries, which will affect farmers' income structure. Studies have proven that the income of farmers who have received vocational education is 15.22% higher than those with ordinary high school education (Chinese Academy of Agricultural Sciences, 2008). One of the major reasons is that farmers with vocational education can use special skills to engage in other types of work. Therefore, strengthening farmers' (scientific) education and training, and increasing their special skills, is a strategy that will address the root problem of increasing farmers' income.

## Challenges and issues facing education of farmers at present

### *1. Challenges*

#### **The education of farmers is becoming more comprehensive**

Higher expectations have been placed on farmers in terms of production, living, market, culture and mindsets. Meeting these requirements is important in light of the following developments. Along with the upgrading of agricultural structure, there has been a transformation of production and operation; the extensive adoption of high and new technologies; the expansion of the functions of agriculture; the establishment of new relationships between agriculture and industry; and changes in rural population and social organisation structures.

#### **The education of farmers is becoming more complex**

Because of the vastness of rural areas, striking differences in geographic regions, the dispersed distribution of farmers, plus large-scale migration of rural labourers for employment, farmers' mobility is high, which increases the difficulties in organising them. In addition, it is apparent that farmers are engaged in multiple production activities. The characteristics of individualisation and the diversity in farmers' educational and training needs further emphasise the challenges in terms of content organisation, curriculum development, teaching material development as well as the use of modern educational technologies. Farmers now encounter higher requirements in production, living, markets, culture and mindsets. An important task we must face now is the improvement of the comprehensive quality of farmers, in order to meet these requirements.

**The education of farmers is becoming more arduous**

This is reflected in the following aspects:

- a) The large number of farmers: there are 490 million rural labourers in China and each year the number increases by 8 million. Theoretically, all of them need education and training.
- b) Low quality: according to surveys about one third of farmers in China have had only primary school education or below, of whom, 7% are illiterate or functionally illiterate, 25.8% have had primary school education, 49.4% have had junior middle school education, 16.8% high school education and only 1.1% has college education or higher
- c) Lack of motivation: comparing with non-farming sectors and urban areas, the rational choice of farmers is to get away from agriculture and leave rural areas. Many farmers, particularly young farmers, think that participating in learning about agriculture is a waste of time. They are not willing to participate in training.
- d) Poor conditions: agriculture is a weak industry and the education of farmers is at a disadvantaged position. When these two factors overlap, there are too many historical backlogs in the education of farmers. Due to insufficient inputs over a prolonged period of time and to backwardness in conditions and means, it is difficult for education and training institutions below county level to deliver efficiently high-quality education.
- e) Lengthy processes: along with scientific, technological and social progress, agricultural modernisation and acceleration in the construction of a new countryside, the requirements for improving the quality of farmers are increasing. The criteria, requirements and connotations of a new type of farmer are dynamic. The nurturing of a new type of farmers is a long-term and arduous historical task. Therefore, the education of farmers is a long-term foundational work, which will be woven into the entire historical process of construction of socialism with Chinese characteristics.

**2. Issues**

Some issues need to be resolved in order for the education of farmers to suit the requirements of the new situation, which have the following aspects.

**Dispersed efforts**

At present, the implementers of farmers' education include multiple agencies responsible for agriculture, education and labour. There is multiple-administration in the endeavour; at the same time, since there is no affiliation between the agencies, effective coordination and communication are often absent. Consequently, there is a dilution of instructional staff and funding and it is difficult to achieve optimal results in education. There is, therefore, the need to further define the functional department or championing agency for farmers' education, which will coordinate and scientifically plan

in an all-round manner, avoiding dilution of resources, overlap of contents, disordered management and unhealthy competition.

### **Lip-service**

Some local governments and agricultural administrations have poor awareness and understanding about the education of farmers, and insufficient attention is given to it. The work is not properly delivered. The education of farmers is difficult with slow returns; some agencies and leaders provide only lip-service without action. They talk a lot, but no action is taken. As such it is difficult and impossible to do a good job in the education of farmers.

### **Insufficient input**

For a long period of time, the infrastructural input of the state for the education of farmers has been inadequate. In particular there is a severe shortfall of investment in the construction of infrastructure at county and township levels. The conditions for delivering the education and training of farmers are poor. Quite a number of townships and villages could not find a place to deliver training to farmers; in some cases, it is difficult to find even a couple of chairs and desks. A special allocation from government finance for the training of farmers started only in recent years, but it is insufficient due to the historical shortfalls.

### **Lack of guarantee policy**

Farmers do not yet have an entitlement of education and training equivalent to that of employees in urban areas. The Labor Law and Law of Vocational Education promulgated in China have explicit stipulations on funding sources and approaches to the education and training of urban employees. The Decision of the State Council of Developing Vocational Education (Document No. 35 of State Council 2005) stipulates that 1.5% out of the total salary quota of ordinary enterprises will be set aside as a funding source for education and training, while it can be 2.5% for enterprises with good economic returns, heavy training tasks and high technical requirements. The fund will be used for the education and training of employees, particularly those who are directly involved in production activities. So far, China has not promulgated specific law and has not provided institutional arrangements for the education and training of farmers. Therefore, there is no strong legal or institutional guarantee in rural education and training.

### **Inflexibility of mechanism**

Given that the number of farmers is big, the composition is complex and farmers are dispersed with diversified needs, the education of farmers has to be more flexible, targeted and effective. Efforts should be made to achieve results in the various programmes and projects implemented. At present,

the content, timing, location, arrangement and selection of method and approach to farmers' education and training in some localities fail to match farmers' actual needs. The qualifications of the instructional staff do not suit the requirements of the new situation and new tasks. In particular, the aged knowledge of agricultural technical extension agents as trainers at grassroots is a bottleneck. They do not have enough opportunities to access continued education; they lack comprehensive understanding of new technologies; their knowledge structure is simple; they do not have adequate information; and their approach to training is obsolete.

### Establishment of a flexible and open system for farmers' lifelong education

Establishing a flexible and open lifelong education system is the development agenda tabled in the *Outline of National Medium and Long-term Plan of Education Reform and Development (2010–2020)*. The education of farmers is an important component of a future national lifelong education system, and it is inevitable that to their needs are met, with diversified and flexible modalities. The establishment lifelong education for farmers, with Chinese characteristics, needs to start from the actual situation of the country, with agriculture, rural areas and farmers as the entry point. The role of different types of education and training institutions at various levels should be fully mobilised gradually.

### *Formulation of relevant laws and regulations for farmers' lifelong education*

Since reform and launch, the state has been attaching great importance to the nine-year compulsory education and vocational education in rural areas. Basic education and vocational training in rural areas have witnessed leaps in development. However, there are still no relevant laws and regulations concerning farmers' lifelong education. Consequently, the rights of farmers to lifelong education cannot be guaranteed, which has to some extent affected farmers' access to lifelong education; it is hence imperative to develop relevant laws and regulations for farmers' lifelong education.

The development of laws and regulations for farmers' lifelong education has two dimensions. First, in line with China's actual educational situation and social development, the formulation of a Lifelong Education Law should be accelerated. Such a law will have an overall guiding role with extensive applicability; it will stipulate and guide the delivery of lifelong education from the strategic development perspective. Second, existing laws and regulations should be amended to include content relating to farmers' lifelong education. In existing laws and regulations, while the issue of lifelong education is more or less mentioned, they do not single out the issue

of farmers' lifelong education.

Regardless of which of the aforementioned methods will be adopted, the laws and regulations should have detailed definitions for administration, educational institutions, recipients of education, funding, guarantee and quality monitoring in lifelong education. This will help with comprehensive planning and coordination for the lifelong education. The work of lifelong education will therefore be managed through the legal system.

### *Establishment of a lifelong education guarantee mechanism for farmers*

In line with China's present actual situation, the establishment of a guarantee mechanism for farmers' lifelong education should be done through the following three aspects:

#### **(1) Establishment of a corresponding rural labour employment system**

Lifelong education is the major channel for farmers to realise self-development. However, due to low agricultural productivity at the present stage, the requirement for labour is not high. A large number of rural labourers have entered the labour market without vocational training; it is necessary therefore to build a series of employment systems for rural labourers, so as to promote the development of lifelong education to meet demand and individual development needs.

New labourers in rural areas (future farmers) must receive vocational training or vocational education prior to entering the labour market and obtain the corresponding graduation or vocational qualification certificates before starting a job. Those who have already entered the market should be encouraged by the government to receive lifelong education. Specifically, this can be done in three ways:

- (i) the implementation of a Green Certificate programme. A control system for rural labourers should be implemented gradually for employment or farming, offered on the basis of education certificates;
- (ii) a system of "training prior to employment" should be implemented for laborers of township enterprises and tertiary sector employees in rural areas; and
- (iii) a "three certificates" system (i.e. certificates of primary, intermediary and practical technique) for professions in rural areas should be gradually implemented, to ensure that certificate-holders will have priority for employment or for land contracting.

Only through tightening access to employment can farmers' awareness of and attitude towards lifelong education be increased by the motivation mechanism. This will increase farmers' demand for lifelong education from the both subjective and objective aspects and promote the development of lifelong education.

## **(2) Broadening the channels of fundraising for lifelong education**

An assured funding input is the material basis and guarantee for establishing a lifelong education system. It has consistently been a bottleneck limiting the development of lifelong education. The inevitable approach to increase funding is to attempt to broaden the channels of fundraising. The establishment of farmers' lifelong education would require a new system of investment and management, which primarily relies on investment of the state as the pillar but combines diversified investment from society at large, broadened external investment channels and improved internal capacity.

- 1) The state needs to increase special funding to farmers' lifelong education and finance at various levels should intensify support to education in rural areas.
- 2) A foundation for lifelong education should be established, which will be able to absorb funds from society at large and accept special funding and donations from the society.
- 3) The scope and function of farmers' lifelong education should be broadened. Revenue to education in rural areas should be increased, so as to strengthen its capacity for self-development.
- 4) Supervision and management of funding for education of farmers should be strengthened to ensure sound use and increased economic efficiency.
- 5) Efforts should be made to increase farmers' awareness about lifelong education, and to encourage individuals and households to invest in education.

## **(3) Building "overpasses" for lifelong education of farmers**

The establishment of an open and multiple-dimensional education system for farmers needs to consolidate various resources of education at different levels and categories, so as to build up an overpass with multiple channels, forms, levels and contents for lifelong education.

- 1) Great efforts should be made to develop vocational education in rural areas; we should encourage farmers with good foundation and who have a need for education to receive vocational education.
- 2) Adult education in rural areas should be actively developed, so as to form an adult education and training network with county science and technology training centres for farmers at the head, adult education schools at various levels as the backbone and village adult schools as the basis.
- 3) Higher education targeted at rural areas should be developed appropriately, using modern distance education methods and existing adult education channels to steadily extend higher education to rural areas to meet farmers' higher education needs.
- 4) The integration of primary, middle and high-level vocational education, the mutual acceptance of ordinary, vocational and adult education and

the mutual acceptance of credits between formal and non-formal education should be explored. Links should be established between formal and non-formal education. Efforts should be made to try out a system that can convert the learning outcomes of non-formal education, relevant professional qualification and skills to credits in formal education. These can help to realise effective linkage between training and education.

### *3. Speeding up the information-driven process of education in rural areas*

The present is the era of the knowledge and information economy in which science and technology are developing rapidly in the world. Along with advancements in infrastructural development of the information industry in China, modern distance education – with satellite, television and the Internet as the media – will become the mainstream means of education delivery. The establishment of lifelong education needs to use fully the advantages of modern distance education in order to reduce cost and expand coverage and promote the progress of information-based rural education.

- 1) The construction of information infrastructure for farmers' education should be accelerated. The construction of an information-driven public education system and the building of public education network platforms should reflect both localisation and economics, so as to increase the usage rate of facilities and to provide material and technical guarantees to farmers' lifelong education.
- 2) The development and consolidation of information resources for farmers' education should be intensified, in order to set up a multi-dimensional and multi-functional interactive resource system. Distance education by radio and television broadcasting, the Internet, satellite network and VCD should be fully used. In this way, advanced technologies, experience and information from China and other countries will be rapidly and effectively transmitted to villages and farm households with high-speed and wide coverage, overcoming the limits of space. This will facilitate the rapid conversion of such achievements to productivity in farmer households and help them to become better-off.

Lifelong education relates to the needs of farmers for future development and rural social development and the all-round development of a better-off society. We must look at the issue from the perspectives of being responsible for farmers and for the entire era. The advancement of lifelong education of farmers needs the joint efforts of government and society at large. We believe that there is a great potential for lifelong education of farmers and that the future is bright.

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# 23 Lifelong learning and industrial development – the practice of the machinery industry

Tu Zhonghua<sup>1</sup>

In the process of constructing the national lifelong learning system, the role of the industrial organisation is to provide many forms of learning opportunities to various types of personnel. Due to the features of industrial organisation, lifelong education and lifelong learning in industry mainly appear in the form of continuing education. Lifelong learning in industry differs from traditional formal school education: it is informal, has no set form and covers all the employees in the whole industry. This paper focuses on introducing the practice of continuing education into the state's machinery industry, as well as the relationship between lifelong learning and industrial development.

## Overview of the machinery industry

The machinery industry is an important component of China's equipment manufacturing industry: it is a fundamental industry which provides technical equipment for national economic development. In 2009, China had more than 99,300 machinery industrial enterprises, with total assets of up to 6.68 trillion and up to 16,250,000 employees. The machinery equipment industry's gross finished industrial output was 10.75 trillion by 2009, an increase of up to 16.07% compared with 2008 (State Statistics Bureau, 2010). As evident from its size and scale, China's equipment manufacturing industry has been listed among the largest in the world.

## Status and progress of continuing education in the machinery industry

The entire historical development process of the machinery industry has been closely accompanied by the development of continuing education, which is an indispensable part of the development of the industry and plays an important supporting role in its revitalisation. Within the industry, continuing education is performed primarily from the following aspects:

### *Education and training on the management of the machinery industry* **Training of professional managers**

To a great extent, the state of this group determines the management level and competitiveness of the enterprise, and even of the industry as a whole. In recent years, the China Machinery Enterprise Management Association has actively explored and constructed the professional managers' certification training system. A committee for training and certification of professional managers in the machinery industry, equipped with a group of outstanding teachers, has been established. It has carried out a series of management practices, work procedures and processes, and has established a corresponding standard assessment system and training evaluation system.

In this system, the professional managers of the machinery industry are classified into three levels with different training content and requirements: senior professional manager (including corporate directors, general managers and senior management); professional manager (department managers, branch heads, and so on); and candidate professional manager (corporate management at basic level and general managers). Through research and development, a competency module for the professional managers of the machinery industry has been created. This module is composed of 10 elements, including management reform, strategic planning, team construction, systematic thinking ability, execution ability, innovation ability, developing others, co-working consciousness, performance assessment and learning ability. In addition, classification and assessment criteria, as well as testing and evaluation methods, have been constructed, based on the module. The professional managers' certification and training work has been actively coordinated by industrial organisations and enterprises distributed in more than 20 provinces and cities, forming a training network. According to data collected by the Chinese Education Association of Machinery Industry (CEAMI, 2010), in the past five years, about 600 outstanding business managers have passed the certification training for professional managers in the machinery industry.

### **Management knowledge update**

As part of the national project to update the V of professional technical personnel, management knowledge update is mainly designed to improve

management capabilities. Its focus is on capability construction, targetting the senior management personnel of large and medium-sized national enterprises and key industries and closely integrating the demands of the job.

### **Overseas training**

This started in 1994, when the “Education Fund for the Machinery Industry” was founded. Working together with the world-class Sloan School of Management at the Massachusetts Institute of Technology, the purpose is to carry out corporate senior management training. This training will cultivate a group of corporate leaders and high-level compound management personnel possessing both international vision and modern corporate management knowledge. The method employed incorporates corporate sponsorship, university contracting and receiving short-term training directly from world famous schools.

### *Continuing education of the professional technical staff of the machinery industry*

#### **Professional technical personnel update project (Project 653)**

In 2005, the Chinese Ministry of Personnel issued the “Implementation Plan for the Professional Technical Personnel Knowledge Update Project”. This plan specified that China would focus on training 3 million medium and senior professional technical personnel, with the purpose of adapting to the leading edge of technical developments with strong innovation ability in five areas including modern agriculture, modern manufacturing, information technology, energy technology and management. Among these, the modern manufacturing area is in the charge of the China Machinery Industry Federation. The education and training principle is based on government promotion, company support and individual voluntary contribution. Industrial associations play a full role in promoting continuing education for professional technical personnel. Based on 2009 statistics (CEAMI, 2010), relevant education and training have been implemented in 88 educational units among industrial enterprises, science research institutes, universities and social training institutions, and about 410,000 personnel in total have been organised to participate in the knowledge update education and training programme for the modern manufacturing area throughout the industry.

### **Continuing education and accreditation for mechanical engineers**

First, establishment of the training base for mechanical engineers: in 1983, the Continuing Education Institution for Mechanical Engineers was set up by the Chinese Mechanical Engineering Society. Dependent on the support of the government, industry and academic organisations, this institution has established an extensive social school network. The purpose of the institution is to organise the continuing education of the machinery industry’s professional technical personnel, to update and extend their knowledge and

enhance their business qualifications, so that they are able to adapt to the requirements of scientific progress and modern management. The establishment of this institution opened up a new area of carrying out for large-scale training of on-duty technical personnel and cultivated a large group of personnel (the trainee number for the first three classes only was up to 16,300) who had mastered new theories and technologies.

Second, self-learning commission examinations for engineering professionals were introduced. The aim was to continuously improve the sustainable development capacity of continuing education. A new pattern of “Combining on-duty continuing education with national examinations” and “Combining continuing education with academic education” was adopted. By the end of 2009, about 100,000 people had been gathered to participate in study towards the self-learning examinations, a total of 13,800 among them have obtained a university graduation diploma in the fields of mechatronics and industrial engineering.

Third, a mechanical engineers qualification was implemented by the Chinese Mechanical Engineering Society under the approval of the China Association for Science. The working ideal is taking “qualification as the leader and continuing education as the theme” and aims to recognise the relationship between continuing education, qualification certification and international mutual recognition under the conditions of economic globalisation. This effort has achieved good progress. In 2003, pre-examination training on “Comprehensive qualification and skills for mechanical engineers” produced the first batch of mechanical engineers passing the community certification. By 2009, more than 2,200 people around the country had passed the technical qualification certification for mechanical engineers (CEAMI, 2010). At the same time, an international mechanical engineers certification was being explored and, currently, a mutual recognition pilot with British mechanical engineers is being implemented.

Fourth, in order to meet mechanical engineers’ career development demands, we have set up a “mechanical engineers online learning platform” to carry out training. Short-term training for mechanical engineers (in, for example, automotive, electrical and instrumentation systems) is regularly carried out by various professional associations and academic institutions of the industry, based on their own demands. Currently, a large training network has been formed which covers more than 30 provinces, cities and autonomous regions with up to 80 registered training bases.

### *Education and training of skilled personnel in the machinery industry*

#### **Developing a national vocational qualification certification system**

This work is mainly done by the China Machinery Industry Enterprise Management Association and the Occupational Skill Testing Centre of the machinery industry. Starting from standards, tutorials and test base construction, it involves 28 industries and about 300 enterprises, including not only

big industries such as agricultural machinery, machine tools, electrical appliances and engineering machinery, but also some branch industries such as the bearings and modeling industry. By the end of 2009 (CEAMI, 2010), more than 50 standards in total had been developed; a network of test bases containing about 400 types of work had been established; 181 assessment training agencies at different levels around China had been set up; a management and evaluation team formed of more than 4,000 people had been established; and a vocational skill evaluation and management system gradually formed.

### **Carrying out vocational skill contests for the specific work types within this industry**

Since 2004, we have planned and conducted many vocational skills contests in the automotive, engine, boiler and other industries. Such contests are organically combined with training, job practice and appraisal work, and thus a large group of outstanding skilled personnel have been cultivated in this industry and the construction of a skilled talents team has been promoted.

### **Cultivating senior professionals for the manufacturing industry**

In order to identify and evaluate staff skills and to standardise the assessment conditions for senior professionals, the work of assessing a large group of senior technicians and technicians was carried out in 2009 in many industries including the automotive, electronics, transformers, wire and cable industries.

### **Organising and implementing vocational education development projects**

To promote training for technical proficiency and by active cooperation with the Ministry of Education and the former Ministry of Labour and Social Security, the industry implemented the “Cultivation and training project for urgently-needed skilled talents in vocational schools, the manufacturing industry and the modern service industry” and the “National Highly Skilled Talents Training Project”, which carried out cultivation and training activities for various technical skills adapting to the demands of industrial development. In 2000, the National Machinery Vocational Education Steering Committee was founded. It has greatly promoted education and teaching and improved educational quality. In 2006, the Machinery Industry Education Development Centre cooperated with China Central Radio and TV University to jointly carry out the pilot work of China Central Radio and TV University talents cultivation model reform and open education.

### ***Constructing learning organisations***

Within the industry, we vigorously promote the establishment of learning organisations. For example, in recent years, we have shared and dissemi-

nated the experiences of the Jianghuai Auto Group to establish a learning corporation – comprising the Xuji Group which wants to inspire all its staff to participate in learning in carefully organised teams, and the Wuxi Weifu Group which wants to improve core competitiveness and innovation through multiple learning activities. All these successful experiences have elevated the construction of learning enterprises of the whole industry to a new level.

### *Progress of continuing education*

In recent years, continuing education within the machinery industry has made good progress. From a sample survey of staff education and training performed in 2009 in 17 large and medium-sized enterprises within the machinery industry (CEAMI, 2010), we can draw the following statistical results:

- a) The overall staff education level has been significantly improved: among the 17 enterprises, those with an education level below junior secondary school now constitute 21.2% of all employees, those with highschool-level education constitute 45.8% and those with college-level education constitute 33.0%. In 2004, these rates were respectively 31.3%, 45.5% and 23.4%. The proportion of staff educated at below junior secondary school level has therefore decreased by 10%, and the proportion of those with a college education has increased by about 10%.
- b) Enterprises are paying much more attention to staff education and training: the 17 enterprises have set up a total of 31 staff education and training agencies. The total staff education expenditure of the 17 enterprises averages 1.64% of total wages.
- c) The average corporate staff training participation rate is up to 58.5%. The number of workers participating in such training reaches about 65.8% of the total, whereas the number of the management personnel and professional technical personnel who have received such training is up to 47%.
- d) From 2004 to 2009, the output of the national machinery industry approximately doubled. This expansion will certainly create new demand to speed-up continuing education. Reciprocally, the development of continuing education will further support the growth of the machinery industry.

## Several key factors in the continuing education development of the machinery industry

### *Promotion by government*

In recent years, the State Council and related ministries have successively issued a series of decisions and guidelines to further strengthen human

resources in the industry. These documents reflect the fact that China has been paying great attention to the cultivation and continuing education of her workers.

### *Coordination and facilitation of industry organisations*

The China Machinery Industry Federation undertakes responsibility for guidance and coordination of industrial continuing education. Meanwhile, some major professional associations and academic institutes have played an excellent role in many aspects, including implementing industrial vocational standards; mechanical engineers' continuing education and vocational qualification certification; professional managers' training and certifications; skilled personnel training; and establishing an industrial training system. All this shows that industrial organisations are playing an important role in the development of continuing education.

### *Commitment of enterprises*

Because of rapid economic development and market competition, managers realise that the most successful enterprises in the future will be learning enterprises. Some even think that the competitiveness of a successful enterprise lies in its ability to learn faster than its competitors. As a result of some personnel reforms in recent years, including the introduction of vocational qualifications and performance assessment, employees have also been inspired to learn more. It was "I am required to learn" in the past, and it is "I want to learn" now. This is a powerful force driving the construction of learning enterprises.

### *Challenges, opportunities and further strategies*

In comparison with advanced countries, China's industry is still largely lagging behind, which can be seen mainly in its insufficient innovation ability, lack of high-quality equipment and continued dependence on imports for advanced technologies. The task of reducing energy consumption and protecting the environment is a further difficult challenge. To adapt to the current international and domestic economic environments and encourage industry to grow stronger, China has proposed an industrial reinvigoration plan. Meanwhile, the whole industry is actively exploring ways to realise continuous, stable and healthy development. The reinvigoration of industry mainly depends on technical progress, yet technical progress mainly depends on the quality of human resources, which cannot be improved without the development of continuing education. At present, there is an acute shortage of senior management personnel, senior professional technical personnel and senior skilled personnel in the machinery industry. Creative and leadership skills have become particularly scarce resources. A change of economic development models and adjustment of industrial structure will significantly increase the machinery industry's

adaptability and flexibility in terms of the transfer of positions and jobs. It is foreseeable that in the future the industry will have a huge demand for continuing education and such demands will constantly develop in depth and breadth.

### *Policy recommendations*

In view of the importance and urgency of carrying out continuing education, the government should vigorously strengthen its role in the planning and coordination of continuing education, and should promote reform of the management system.

There is a need to improve the systematic construction of human resource management, such as job specifications, vocational qualifications and the creation of an effective incentive system for continuing education.

The role of industrial associations in continuing education must be fully brought into play. Industrial organisations should become the core organisers of continuing education within their own industries, and establish an educational training system that serves the whole industry.

The government sectors and the enterprises should undertake their respective responsibilities to form a diverse and multi-form continuing education system. Universities, research institutes and social training agencies should cooperate closely. Different training and learning methods should be adopted, according to different educational targets and requirements.

Related government departments should support industrial continuing education with increasing financial inputs and set up special funds to promote continuing education. Meanwhile, enterprises should also increase investment in the continued education of their employees.

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## Part VI

### Summary of the General Rapporteur of the Forum

# 24 Summary Report of the General Rapporteur

Manzoor Ahmed<sup>1</sup>

## I. Introduction

Over 200 participants from 35 countries attended the Shanghai International Forum on Lifelong Learning from 19 to 21 May 2010. The forum, which took place during the World Expo 2010 in Shanghai, PRC, was hosted by the Shanghai Municipal People's Government, the Chinese Society of Educational Development Strategy (CSEDS), the National Commission for UNESCO of China, and UNESCO.

The Shanghai Forum was the first major international follow-up event in the wake of the CONFINTEA VI conference held in 2009 and at which the *Belém Framework for Action* was adopted. Its aim was to strengthen the momentum for lifelong learning created by CONFINTEA VI, and to help translate the discourse on lifelong learning into practical action to build lifelong learning systems.

The Shanghai World Expo is unique in devoting itself to presenting a vision for a better society and a better life in a world characterised by rapid urbanisation, rather than showcasing products and technologies, as expos usually do. It is entirely fitting that the World Expo turns the spotlight on sharing the vision and practical actions for creating learning societies – because such societies are key to sustainable development, and support harmony, justice and life with dignity for all human beings.

The forum brought together a truly remarkable group of people from across the world – Africa, Asia and the Pacific, Latin America, Europe and North America – all of whom have dedicated their lives to developing concepts and practices of learning and education, and to studying and critiquing these. They offered their thoughts on the way things have turned out, where we are today and where we should or could be. And they did, as we stand here after CONFINTEA VI, ponder the prospects of achieving or not achieving the 2015 Millennium Development Goals and EFA goals, and

considering the still bigger challenges and possibilities facing humankind at the beginning of the 21st century.

Experience, achievements and concerns were shared in the plenary and breakaway sessions by practitioners, policy-makers, advocates and academics from many countries. It is impossible to summarise and encapsulate the richness and nuances of the deliberations. The best that we can do is to capture strands of the main arguments and positions that emerged during the forum. We attempt to present the various sides of the argument in each case, and outline a number of propositions regarding strategic actions that merit attention.

## II. China illustrates global progress

Let us first note and celebrate the progress that was made and reported upon in this forum. To illustrate the diversity and scope of what has been done in many countries, we shall briefly outline the learning opportunities beyond the formal system which have been introduced in China as elements of lifelong learning. Benin, Indonesia, India, Japan, Korea, South Africa, Thailand and USA, among others, also shared their own history and the predominantly non-linear progress they had made towards building components of lifelong learning. The experiences of these countries as well as of China bring to the fore a number of conceptual, strategic and operational issues which were the subject of intense discussion in the forum.

In China, the scope of lifelong learning is seen to be at least three times that of the formal school population: there are a billion candidates for lifelong learning, including 790 million workers who need to renew their knowledge and skills; 120 million people migrating from rural areas to cities who need to adapt to new work and living environments; and 144 million elderly who want to be active citizens and pursue a meaningful and enriched life of leisure (Hao, 2010).

Hao Keming, President of the Chinese Society for Educational Development Strategy, informed us of various new modes of continuing education that have been created. These have developed fast through partnerships between the government, schools, communities, industries, enterprises and other organisations.

A major expansion of opportunities in China has occurred to enable rural people who have no formal education beyond the primary level to acquire relevant knowledge and skills. Continuing education is offered at adult secondary vocational schools and adult higher education institutes, which grant diplomas. There is also provision for non-diploma-based continuing education, such as the secondary vocational schools for farmers, which have provided training to over 1.1 billion people since the mid-1980s. Moreover, workplace training is offered to around 90 million participants every year. There is continuing education for administrative cadres and other

professionals in governments, industries and non-governmental organisations involving women, youth and workers.

China has built a distance education and service platform based on satellite, television networks and the internet. The number of registered distance learning students in regular higher education institutions has reached 1.1 million.

A national pilot learning communities project has been initiated in 114 locations, offering various forms of continuing education that are coordinated effectively in order to ensure that provision is of a consistently high quality. Provincial governments also have set up over 400 provincial learning communities.

A new and significant initiative will expand and reform school education, including curriculum and pedagogical practices, guided by the principle of lifelong learning. This will make school education more open and flexible to meet the diversified needs of learners. Vocational schools will be encouraged to provide both diploma education and short-term professional training for all citizens. To enhance the social service functions of higher education institutions, these will be required to broaden their offerings in continuing education and training. Incorporating the principle of lifelong learning into the total education system is considered to be one of the most important goals of the 21st century. In this context, consideration is currently being given to the establishment of a guiding and coordinating body at the national level, with the participation of industries and other stakeholders.

Other key enabling measures for the further development and promotion of lifelong learning which are either underway or have been identified as necessary are:

- an overall legislative framework for lifelong learning, which will clarify the rights and responsibilities of the government, organisations and individuals;
- a national lifelong learning support and service system that covers both urban and rural areas through the application of ICT, including satellite and broadcasting networks and the internet;
- improved learning outcomes assessment and accreditation, and credit transfer systems;
- research into ways of developing personal lifelong learning credit accumulation accounts and integrating these step by step into the continuing education system;
- a national qualifications system in which knowledge, skills and competences are equally weighted, and diploma and professional qualifications are mutually transferable;
- a learning budget assurance and cost-sharing system which clarifies the responsibilities of the government, employers and individuals, thereby ensuring that more support is given to disadvantaged and vulnerable groups; and

- research into incentive mechanisms to increase spending in workplace learning by industries, organisations and civil departments (Hao, 2010).

With more than 6,000 learning stations and other basic and tertiary level distance education, face-to-face and combined facilities outside the formal education and training system, the city of Shanghai itself stands as an example of the emerging architecture of lifelong learning. These are the building blocks for a “learning city” that will in time form the learning society that Shanghai has pledged to become (Li, 2010).

### III. Re-affirming the concept

The *Belem Framework for Action* affirmed that “Lifelong learning ‘from cradle to grave’ is a philosophy, a conceptual framework and an organising principle of all forms of education, based on inclusive, emancipatory, humanistic and democratic values” (UNESCO, 2009).

Lifelong learning is, of course, as old as human life itself. As Ye Lan put it, “Lifelong learning was there before education was invented” (Ye, 2010). Or, in the words of Roger Boshier, people in traditional societies had to learn to stay alive; hence, learning was survival (Boshier, 2010). The idea of lifelong learning only became obscured more recently, as social functions became increasingly specialised and institutionalised, leading to the ascendancy of formal education in childhood and early adulthood. Abdel Baba-Moussa from Benin reminded us that it was Philip Coombs who introduced the conceptual categories of formal, non-formal and informal education in the 1970s. Coombs also pointed out that the vast majority of human learning was of the informal and non-formal kind, and continued on a lifelong basis (Baba-Moussa, 2010; Coombs and Ahmed, 1974).

Several speakers, including Adama Ouane and Heribert Hinzen, referred to the reports of the UNESCO Commissions of 1972 and 1996, headed by Edgar Faure and Jacques Delors respectively (Ouane, 2010; Hinzen, 2010). As the Faure report stated, “If learning involves all of one’s life, in the sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources, then we must go even further than the necessary overhaul of ‘educational systems’ until we reach the stage of a learning society” (Faure *et al.*, *Learning To Be*, 1972: xxxiii). Meanwhile, the four pillars of learning invoked by Delors – learning to be, learning to know, learning to do, learning to live together – elaborate the paradigm of the intricate interaction of learning, life and society (Delors *et al.*, 1996).

Roberto Carneiro eloquently described the new educational landscape as one that moves from mostly “taught learning” to a combination of taught learning, a lot of self-learning, strong community learning, and increased assisted and networked learning – coupled with an unbundling of education

services that allows for much-enhanced opportunities in relevant learning for all with far greater flexibility of time and place. Learning to learn is seen as the foundational skill, and includes building self-image and self-esteem, strengthening critical thinking skills and motivation, and then developing strategies for and participating in learning. Kasama Varavarn drew on the experience of Thailand to further underscore the importance of building both the capacity and motivation for self-directed learning (Carneiro, 2010; Varavarn, 2010).

Rosa María Torres affirmed and complemented these ideas by equating learning with living, asserting that life is the ultimate curriculum. She and others emphasised learning as a collective and social process which requires the creation of learning families, communities and societies.

Torres also drew attention to what lifelong learning was not, stating that it was:

- not lifelong *education* (a mechanistic and controlled process),
- not limited to adults;
- not an economistic strategy to produce human resources (viewing humans as production machines);
- not just individual learning, but a collective and social process; and
- not in conflict with the right to education (but instead enlarging it as the right to learning) (Torres, 2010).

Kusumiadi and Martono from Indonesia and Shirley Walters from South Africa, among others, stressed the need to balance the vertical integration of lifelong learning with the horizontal integration of life-wide learning and the learning opportunities, objectives, contents and scope it entails. One aspect of life-wide learning is to become active and effective citizens – for personal fulfilment and as a social duty – and this is a vital concern in both developing and industrial societies (Kusumiadi and Hartono, 2010; Walters, 2010). Another expanded vision of learning is illustrated by Singapore's four-fold objective of building human capital, social capital, emotional capital and imagination capital, as described by Professor Carneiro (Carneiro, 2010).

The concepts reflected in the formulations presented here may be regarded as abstract and, arguably, idealised, and thus would invariably face many obstacles in the course of attempts to translate them into reality.

#### IV. Some contested issues

Probing into the dialectics of or tensions inherent in a number of the positions taken during discussions may help to clarify the obstacles and constraints encountered and suggest ways of finding and applying pragmatic

and workable solutions. Some of these are noted briefly here.

- *The tension between approaches that are open, flexible and participatory enough to respond to individual and community needs, on the one hand, and state and public sector responsibility for lifelong learning, on the other.* In the context of the market economy and the commodification of public goods, this issue has become a legitimate concern. It appears to be more a matter of the political and ideological positions taken by the protagonists rather than any inherent contradiction between flexibility/ choice and public/state responsibility in terms of creating regulatory frameworks, providing or helping to mobilise funds, establishing partnerships and collaborations with various stakeholders, and the state serving as the major service provider or the provider of last resort.
- *Is lifelong learning fundamentally a question of providing opportunities for people to acquire job-related skills and adapt to new job markets, as the EU emphasis would appear to indicate?* While the importance of acquiring employment-related skills and improving one's economic well-being cannot be under-estimated, equating lifelong learning with human resource development is clearly a highly restrictive view of lifelong learning that does not accurately represent the EU position, as Hinzen points out (Hinzen, 2010). This, as Boshier and others have noted, is a politico-ideological position that unnecessarily places the neo-liberal and the "social democratic" approaches in opposition to each other.
- *The pedagogical approach – what roles do teachers and learners play? Should the traditional pedagogical roles of teachers and learners be reversed?* This question fails to appreciate the ways in which teaching-learning practices, concepts and norms have changed. The learner-centred approach to teaching-learning, the idea of the self-motivated and self-regulated learner, the teacher's role as a facilitator rather than the fount of knowledge, the concept of teachers and learners being engaged in a joint exploration of discovery, are particularly appropriate and consistent with the philosophy and rationale of lifelong learning.
- *Is a reformist approach to educational change all that is needed to ensure that the lifelong learning approach is integrated into the education system, or is more radical change required at the system level?* A case in point is the use of metropolitan languages such as French as the medium of instruction in formal education, which contradicts the spirit of lifelong learning. Educational reform or change is complex and difficult and the rhetoric or intent of radical change does not necessarily produce the required results. The course of action and strategy has to be context-specific and the agenda determined in as consensual a way as possible by major stakeholders. The interest of the vulnerable and the disadvantaged, a pragmatic timeframe for change and the trade-offs have to be systematically assessed.

- *Is lifelong learning essentially a question of adult education, literacy, and non-formal education?* An affirmative answer would be contrary to the concept and rationale of lifelong learning. Nor is this logical, since formal learning obviously occurs within a person's life-cycle. Synergy is the key word in lifelong learning. Transformation of the educational system has to embrace the entire system to realise fully the power and potential of lifelong learning. At the same time, the reality is that the formal system is well developed structurally and institutionally; therefore, the less-developed parts of the total system have to be given greater attention. It is a question of balance and time-phasing of efforts. Informal learning, although by definition not planned and organised, also has to be brought into the equation creatively and with imagination.

## V. Identified needs and the way forward

On a number of important questions where the debate is not as dialectical or dichotomous, the need for definitive actions and strategies has emerged in the course of the discussion, which deserves priority attention. This, not an exhaustive list, includes:

- *The need to develop and articulate policies.* A critical issue is the scope of the policy – how broad should it be – embracing all aspects of education and learning or confined to specific areas, such as adult learning, vocational skills or a focus on literacy? The arguments presented throughout the forum support a broader scope which would place various components or elements of lifelong learning within the larger context. But this would depend on how much change and development can be realistically undertaken within a given time-frame. A possible compromise is to develop an overall policy framework and within it, consider more detailed elaboration of policy for specific aspects which are given priority in terms of phasing-in change.
- *The legal framework.* Related to policy development is the formulation of the legal framework to give effect to the policy. The legal provisions and associated rules, regulations and procedures derived from the adopted laws help develop a systemic approach and strengthen the governance and management of lifelong learning activities. We heard of the legal provisions in effect or in development in many countries.
- *The Community Learning Centre network as the vehicle for promoting lifelong learning.* Multi-purpose community learning centres with community ownership, such as the Komikan in Japan, exist in many countries. These are effective when they become the base for offering relevant training and knowledge dissemination and for link-up with ancillary support. These, brought together into national or regional networks for technical support,



can be a vehicle for education and learning opportunities which have an impact on poverty reduction and improving quality of life. They, therefore, are the essential building blocks for lifelong learning in the learning society.

- *An equivalency framework.* As described in the case of South Africa, a national qualifications framework helps to deal with the issues of access, mobility, quality and programme development in lifelong learning activities in an integrated way. Establishing equivalency is obviously important in situations where credentials and certification are important. But it can serve as a quality enhancement measure in all kinds of programmes (Walters, 2010). This mechanism can function effectively when there is adequate arrangement for coordination, communication and cooperation among key stakeholders. Contestations and debates are to be expected, but these can be resolved if there is a shared view about the core objectives and research-based evidence is relied upon.
- *Making lifelong learning objectives and content relevant to critical concerns of society.* Lifelong learning derives its rationale from its links and direct relevance to identified needs and problems of individual learners and the collective priorities of societies. This theoretical position is not automatically translated into reality unless this is given systematic attention in conceptualisation and design of strategies and programmes. A case in point is the urgent task of establishing the links and relevance of lifelong learning with the goal of enhancing people's capabilities, knowledge, understanding and skills for sustainable development. As Walters reminded us, one of the messages from CONFINTEA VI was, "The planet will not survive unless it becomes a learning planet" (Walters, 2010).
- *Making full use of the ICT potential.* Advances in ICT have opened new frontiers in delivering content in creative ways and reaching new groups of learners. The potential, however, is very far from being realised. ICT in adult and lifelong learning, given their broad scope and mandate, can help bridge the prevailing digital divide. As John Daniel put it, ICT can help sever the "insidious link between quality and exclusivity" in education and promote wider access and higher quality with lower cost, "all at the same time" (Daniel, 2010).
- *Major increase in public resources.* The share of adult learning components of lifelong learning is typically less than one per cent of the government education budget in developing countries, and is a microscopic fraction of GDP. With an expected increase in the total government budget for education in most countries in the coming years, it is reasonable to set a target to raise the share of adult learning and education/lifelong learning to at least three to five per cent of the education budget in the medium term, increasing further in the longer term. This increase need not be an undue burden and is certainly consistent with the proclaimed role of adult

learning and education/lifelong learning. A rationale for balanced support for different components of lifelong learning, including formal education, should be developed. The enhancement of resources from other sources – including the private sector, communities and external assistance – should also be pursued vigorously.

To conclude, a wide spectrum of learning objectives and groups of learners has to be served by formal, non-formal and continuing education programmes and through an enriched informal learning environment, all of which are components of lifelong learning. The logical corollary to the idea of lifelong learning is that all citizens benefit from and contribute to learning and to society, and communities become learning-friendly and help create a learning environment. Lifelong learning is not an option any longer; and it is not just a necessity; it is an obligation that has to be met collectively by all.

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# Conceptual evolution and policy developments in lifelong learning

Edited by Jin Yang and Raúl Valdés-Cotera

This book is an outcome of the Shanghai International Forum on Lifelong Learning co-organised by UNESCO, the Shanghai Municipal People's Government, the Chinese Society of Educational Development Strategy and the Chinese National Commission for UNESCO. The Forum took place in Shanghai during the World Expo 2010, from 19 to 21 May.

The 24 papers collected here document the debates and discussions led by experts from across the world. The papers are grouped into five themes, recounting first how lifelong learning has evolved conceptually and then how policy has developed in its promotion. Subsequent sections examine its relationship with distance education, new learning media and higher education; its association with the learning cities movement; and its role in rural and industrial development. The General Rapporteur's Summary Report of the Forum provides the final section, giving an overview of the event.

The UNESCO Institute for Lifelong Learning and its Chinese partners hope that this publication will contribute meaningfully to international endeavours in making lifelong learning a reality for all.

ISBN 978-92-820-1172-0