

# chapter 1

## **LIFELONG LEARNING FOR ALL POLICY DIRECTIONS**

### **SUMMARY**

In 1996, OECD Education Ministers adopted “Lifelong learning for all” as a policy framework. However access to learning is not yet a reality for all. Few countries have clearly defined the features of an overall system of lifelong learning, or attempted to implement one. Five key systemic features are identified here.

First, all learning should be recognised, not just formal courses. Systems for transferring credit are improving but gaps remain, especially in recognising informal learning. Good systems for informing and guiding learners, especially adults, remain elusive.

Second, lifelong learning requires good foundation skills among both the young and adults: particularly those with poor initial education. Motivation must be at the centre. This requires fundamental changes in curriculum and pedagogy, emphasising willingness to learn as much as content mastery.

Third, equitable access to learning requires a lifecycle perspective. Under-served groups such as pre-school children and adults must be a priority. Equally important is the quality of opportunities – diverse learning methods, courses and settings to cater for multiple learning needs.

Fourth, countries must evaluate resources according to lifecycle needs and deploy them effectively. Additional public resources may be needed, and new incentives to attract private resources.

Finally, the scope of lifelong learning goes beyond a single ministry. Policy co-ordination must involve many partners.

*This chapter summarises how the OECD has followed up the principle of “lifelong learning for all”, by clarifying its meaning and looking at what countries are doing to implement it.*

*Lifelong learning has come to mean not just adult education, but all learning from cradle to grave...*

*...in different settings. The approach has four key features:*

## 1. INTRODUCTION

It is five years since OECD Education Ministers adopted “lifelong learning for all” as a guiding framework for their education policy, and asked the Organisation to investigate how best to implement lifelong learning strategies. This chapter summarises the OECD’s response to that mandate. It attempts to answer the following questions:

- What is meant by strategies for lifelong learning, and how do they differ from other strategies?
- What are the key policy directions for implementing them?
- What are some examples of policies countries have adopted in practice to implement these strategies?

Section 2 sets out the essential features of the OECD view of lifelong learning strategies, and how these differ from strategies that do not adopt a lifelong learning approach. Section 3 gives an overview of how the lifelong learning approaches are being interpreted and applied in countries. The main body of the chapter reviews five areas of key importance to a lifelong learning strategy and illustrates them with some examples from country experiences. The final section presents some concluding remarks.

## 2. THE POLICY SIGNIFICANCE OF LIFELONG LEARNING

The concept of lifelong learning, or lifelong education, became current in the 1970s. In its early development the concept was equated with giving adults access to formal courses at educational institutions. In choosing the goal of “lifelong learning for all in 1996”, OECD Education Ministers signalled a major departure by adopting a more comprehensive view. This goal covers all purposeful learning activity, from the cradle to the grave, that aims to improve knowledge and competencies for all individuals who wish to participate in learning activities. International organisations such as UNESCO and the European Commission have also adopted the more comprehensive approach.

### 2.1 Distinguishing features of the lifelong learning approach

The lifelong learning framework emphasises that learning occurs during the whole course of a person’s life. Formal education contributes to learning as do the non-formal and informal settings of home, the workplace, the community and society at large.<sup>1</sup> The key features of the lifelong learning approach are:

1. The terms *formal*, *non-formal* and *informal* learning are difficult to define precisely. According to the International Standard Classification for Education (UNESCO, 1997) *formal education* refers to the system of schools, colleges, universities and other formal educational institutions that normally contribute full-time education for children and young people. *Non-formal* education comprises any organised and sustained educational activities that do not correspond to this definition of formal education. It can take place both within and outside educational institutions and cater to be persons of all ages. *Informal learning* consists of all intended learning activities that cannot be classified as formal or non-formal learning. They are characterised by a relatively low level of organisation and may take place at the individual level (for example, self-directed learning) or at the group level (for example at the workplace or within the family). In this chapter, the term informal learning has been used to cover *both* non-formal and informal learning.

- First, it offers *a systemic view of learning*. The lifelong learning framework examines the demand for, and the supply of, learning opportunities, as part of a connected system covering the whole lifecycle and comprising all forms of formal and informal learning.
- Second, *the centrality of the learner*. The learner, and initiatives to cater for the *diversity* of learner needs, form the core of lifelong learning strategies. This signals a shift from educational policies that focus on formal institutional arrangements for learning. It represents a shift of attention from the supply of learning to the demand side.
- Third, the approach emphasises *the motivation to learn*, and draws attention to self-paced and self-directed learning.
- Fourth, it takes a balanced view of the multiple objectives of education policy. These objectives relate to economic, social or cultural outcomes; to personal development; to citizenship and so on. The lifelong approach recognises that at the individual level the priorities among these objectives may change over the course of an individual's lifetime, and that each objective has to be taken into consideration in policy development.

Among these key characteristics, the first is the one that most distinguishes lifelong learning from other approaches to education policy. No competing approach is truly *systemic*: all are sector-specific. This central difference has important policy implications. In a systemic strategy:

- People at each stage of life need not only to be given specific opportunities to learn new things, but also to be equipped and motivated to undertake *further learning*, where necessary organised and directed by themselves. Curricula, pedagogical practices and the organisation of learning all need to be examined from this perspective.
- Each learning setting needs to be *linked* to others, to enable individuals to make transitions and progress through various learning stages. Provision therefore needs to be structured in a way that creates appropriate linkages and pathways.
- *Resources* for education cannot be looked at only in the context of separate sectors of formal provision. The lifelong learning approach raises questions about whether the distribution of education and training resources is optimal in promoting an individual's engagement in learning over the lifetime, and addresses resources for informal as well as formal learning.
- *No single ministry* has a monopoly of interest in lifelong learning. The approach requires a high level of co-ordination for developing and implementing policy.

Thus, the 1990s “cradle-to-grave” vision of lifelong learning is substantially broader than the notions of adult education or recurrent education that previously shaped the debate on education policy. The next section reviews briefly some of the strategic approaches that countries have taken to implement this vision.

- *taking a systemic view ...*

- *treating the learner as central ...*

- *emphasising the motivation to learn, and ...*

- *recognising education's multiple objectives.*

*The systemic approach is the key, underlining:*

*motivation to keep learning...*

*...links between stages...*

*...resource allocation choices...*

*...and co-ordination ...*

*...and thus encompasses learning at all ages.*

*Countries have embraced this broad approach, although applications tend to be sector-specific.*

### 3. COUNTRY APPROACHES

Is support for lifelong learning only at the level of political rhetoric or are countries doing something practical about it? In a first attempt to answer this question, Table 1.1 presents illustrative information on how 16 Member countries are attempting to define and operationalise lifelong learning.

Several patterns emerge from the table:

- Lifelong learning is increasingly conceptualised by countries in terms of the broader “cradle-to-grave” view.
- Countries have not articulated explicit targets for the lifelong learning system taken as a whole. In those cases where targets have been identified they relate to specific sectors of provision.
- Many countries are introducing reforms at the sector level that are framed within the context of lifelong learning requirements. Countries differ in the emphasis they place on different sectors or types of provision of lifelong learning. For example, some countries cite lifelong learning as a reason to strengthen teaching and learning at the school level while others put the main emphasis on improving post-secondary and adult training opportunities.
- While all countries recognise both the economic and social objectives of lifelong learning, some emphasise employability and competitiveness while others pay special attention to personal development and citizenship.

Table 1.1 Country approaches to lifelong learning

#### AUSTRALIA

##### Document

*Learning for Life: Review of Higher Education Financing and Policy* (DEETYA, 1998).

##### Context

While there is not yet a formal government policy on lifelong learning, this and other reviews and papers have created an active debate, revealing widespread support for the overall principle (Candy and Crebart, 1997).

##### Main elements

Suggests that in its various forms (structured and unstructured), lifelong learning can provide individuals of all ages and backgrounds with skills and knowledge, enhancing job chances and personal enrichment.

#### AUSTRIA

##### Documents

Country Report (1998);  
Working and Coalition Agreements of Governing Parties (1990, 1994, 1996);  
Advisory Council for Economic and Social Issues, *Beschäftigungspolitik*, (1997).

##### Context

Education is a key part of the programme of Austrian governments, for economic and cultural reasons. Social partners participate actively in defining educational policies.

**Main elements**

Lifelong learning refers principally to vocational and further education and training. Objectives are quite specific. They include increased opportunities for the workforce; equal status of adult education and training in the education system; expanded and improved forms of co-operation between public and private institutions; increased access for disadvantaged persons; permeability between the dual system and the other education and training tracks; re-employment rights to permit employed persons to participate in continuing education and training; improvements to apprenticeship training; increases in schools' autonomy.

**Documents**

Education Indicators in Canada (1999);  
Report on Public Expectations of Post-secondary Education in Canada (1999).

**Context**

Lifelong learning is directly linked to skill acquisition, employment, higher earnings, and a fuller life. Knowledge acquisition at all stages of life is seen as vital to maintaining Canada's competitiveness in a global knowledge-based economy.

**Main elements**

Lifelong learning refers to learning over the life course. Federal, provincial and territorial governments have launched an early childhood development initiative, which recognizes the importance of the early years of childhood in the development of the child. It is anticipated that such measures will provide a strong foundation for participation in lifelong learning. Governments in Canada offer a variety of supports to increase participation for continuous learners, these include: implementing mechanisms that help Canadians save and invest in learning opportunities, improving and enhancing foundation skills such as literacy for adult Canadians, supporting informed decision making by Canadians in investing in skills acquisition, and strengthening the acquisition of international competencies through international academic mobility.

**Document**

Country Report (1998).

**Context**

Lifelong learning is seen as a comprehensive process of vital importance. Immediate concern has concentrated on initial education.

**Main elements**

The process can be divided into two fundamental phases, namely initial education of all young people in the framework of the formal education system, and all subsequent continuing education and learning. Its purpose includes both preparing the student for his/her future profession and the personal cultivation of individuals or the cultivation of community life. Continuing education includes both the education of the employed and of the unemployed, and retired persons. It takes place in formal settings, provided by the state and private institutions, as well as in churches and enterprises. It is financed by varied sources. In the short and medium term, the policy preoccupations of public officials and social partners have been with the formal sector for initial education.

**Document**

Country Report (1998).

**Context**

Lifelong learning is viewed as a mandate for ensuring adequate learning opportunities for adults.

**Main elements**

A measure adopted in 1995 mentions the importance of initial education providing a sound foundation for further learning; it stressed wider opportunities to be provided through rationalisation of services by formal education institutions in order to allow freer choice by adults among learning opportunities as well as co-operation with industry. In May 2000, the Danish Parliament adopted a series of measures to tie continuing training and further education programmes together into a single coherent and transparent adult education system. The reforms were designed to widen access to learning for adults at all levels and in particular for those with low levels of education. The reforms aim to ensure wider recognition for knowledge and skills gained through work and life experience.

CANADA

CZECH REPUBLIC

DENMARK

**FINLAND****Documents**

Country Report (1998);  
*The Joy of Learning: a national strategy for lifelong learning* (Ministry of Education, 1997).

**Context**

One of the few countries that has published a national statement outlining its vision of lifelong learning.

**Main elements**

The government's development plan for the period 1999-2004 defines the following goals: offer one year of pre-school education for all children before the comprehensive school; help more young people to apply for upper secondary general or vocational education and complete their studies; develop student's learning skills in all sectors of the education system; increase the provision of non-university higher education; expand opportunities for adults to study for a university degree; expand opportunities for adults to study for upper secondary and post-secondary vocational qualifications and to pursue other studies that improve their employability and capacity for further learning; develop methods for recognising non-formal and informal learning.

**FRANCE****Documents**

Framework Law on Education (1989);  
Five-year Law (1993).

**Context**

Established education as a top national priority.

**Main elements**

Sets objective of educating 80% of the youth population to upper secondary completion within 10 years. Five-year Law of 1993 adds the right of the young to vocational education.

**HUNGARY****Document**

Country Report (1998).

**Context**

The priority has been the strengthening of formal education.

**Main elements**

Lifelong learning is embodied in the "Strategy for the long-term development of Hungarian public education". It concerns modernisation of public education, and improvements in content that equip students to upgrade their skills and knowledge. The term includes organised learning for adults, subsequent to the completion of formal education, mainly related to the workplace. Non-formal self-education is not included. In the immediate term, the government is focusing on vocational training for young persons, training for the unemployed, at-risk workers, and expanding education opportunities for socially disadvantaged persons and ethnic minorities.

**IRELAND****Document**

*Learning for Life: White Paper on Adult Education* (Department of Education and Science, 2000).

**Context**

This document marks the adoption of lifelong learning as the governing principle of educational policy. It reflects on the role of adult education and sets out the government's policies for the future development of the sector.

**Main elements**

Recommends that adult education should be underpinned by three core principles: the recognition of the importance of both the different levels of educational provision and the quality of the early school experience in taking advantage from adult education; equality of access; and the necessity of serving a diverse population. Proposes that the government's priorities should be to expand the flexibility and supply of core programmes and services for adults, and to concentrate fee relief on those most at risk.

**Documents**

Country Report (1998);  
Labour Agreement (1996).

**Context**

Lifelong learning was introduced as a policy objective by the government in 1996, in consultation with the social partners.

**Main elements**

Recognises the central role of human resources in production; envisions lifelong learning as a fundamental incentive to ensure competitiveness, supported by a balanced social model based on citizens' rights. Aims: to redefine the whole formative and learning system and the roles of institutions and individuals; to implement a united national strategy administered by districts under national direction; to foster motivation to learn; to develop alternative tertiary institutions. The concept addresses concerns about the quality and relevance of initial education, the gulf between formal education and the economy, the relatively low education levels of adults and young persons, and the need for ensuring that the learning process is more individualised and flexible.

ITALY

**Documents**

The First to Fourth and Final Reports on Educational Reform (National Council on Educational Reform, 1985-1987);  
Report on Lifelong Integrated Education (Central Council for Education, 1981);  
Country Report (1998).

**Context**

Japan was one of the first countries to express a comprehensive view of lifelong learning.

**Main elements**

"Lifelong integrated learning" was introduced in the 1960s, as a means for reforming Japan's school-centred education system, and improving re-training opportunities for adult workers. The concept implies that the education system promotes learning by individuals according to their own self-identified needs through life. Lifelong learning aims to remedy problems arising from the pressures of a "diploma society", relating learning less to school achievement and providing spiritual enrichment and better use of leisure time. It places the learner at the centre. It is also seen as a tool for regional development.

JAPAN

**Documents**

Country Report;  
*Education Reform for New Education System* (Presidential Commission on Educational Reform, 1996).

**Context**

Recognised the need for a national framework of policies and infrastructure.

**Main elements**

While the concept of lifelong learning has long been valued philosophically in Korea, in practice it has been viewed as a luxury. The economic crisis of the late 1990s has pushed the government to pursue a more instrumental approach to it. The recently enacted Lifelong Learning Act expands job-related education and training activities for employed workers and the unemployed. At the same time, education reforms are being pursued to diversify student choice in schools, and increase learning opportunities that are accessible at any time, any place, and through varied media. Learning opportunities should in particular promote access, support services, and arrangements for credit transfer that open up study to people at times and places that meet their needs.

KOREA

**Documents**

*Lifelong Learning: the Dutch Initiative* (Ministry of Education, Culture and Science, 1998);  
Country Report (1998).

**Context**

Elements of lifelong learning have been long established in the Netherlands. An action programme to implement specific lifelong learning policies was presented in 1998.

**Main elements**

By the 1980s, there were part-time alternatives for regular secondary and tertiary education, a diversified field of liberal adult education often run by the voluntary sector, a well-organised private sector, especially in the field of correspondence education and the relatively uncharted sector of on-the-job training. By the early 1990s, adult basic education for people with little or

NETHERLANDS

no schooling, and the Open University had been added. There also was rapid growth in training for the unemployed during the late 1980s and early 1990s. In the 1990s, there have been efforts to more closely link vocational training and business, to better translate labour market needs into school goals and curricula, to facilitate entry of non-public providers to learning markets, and to increase transparency of qualification requirements and learning outside the formal education sector. The 1998 action programme focuses on employability of employees and job seekers; employability of teaching staff; and prevention of disadvantages and reorientation of the education system towards lifelong learning.

**NORWAY****Documents**

Country Report;  
*The Competence Reform in Norway, Plan of Action 2000-2003* (Ministry of Education, Research and Church Affairs, 2000).

**Context**

Norway started the process of implementing a competence reform for adults in 1999. The reform creates the basis for a national plan of action for continuing education and training and adult education.

**Main elements**

The reforms are being implemented according to a broad “cradle-to-grave” view of lifelong learning. The concept has expanded to embrace the complete life-span including basic education for children and young people. The reforms seek to help meet the need for competence in society, in the workplace and by the individual. Priorities include: a good basic education (Reform '94); primary and lower secondary education (Reform '97); adaptation of educational programmes more to the needs of adults; organisation of framework conditions so as to ensure competence building for the individual; encouragement of participation and competence building in businesses; documentation and evaluation of non-formal learning; creation of conditions preventing exclusion; provision of information about educational options.

**SWEDEN****Documents**

Country Report (1998);  
*Lifelong Learning and Lifewide Learning* (National Agency for Education, 2000).

**Context**

The National Agency for Education has a special action programme for lifelong learning. The action programme is intended to create an of the anatomy of lifelong learning in Sweden and to identify and analyse key issues in a strategy for lifelong learning.

**Main elements**

Recognises that lifelong learning is an attitude to learning. The great challenge is to create amongst all citizens a desire to learn and the opportunities for realising this. The lifelong learning framework used has two dimensions: the individual learns throughout a life-span; and formal, non-formal and informal learning are equally important. Identifies three principal sectors in which lifelong learning develops: the educational system; the labour market; and civil society. Recognises that lifelong learning requires adequate co-ordination between policy areas. Indicates the need for a shift in responsibility from the public to the private and civil spheres. Stresses the importance of “putting the individual in the centre”. Limits state responsibility to the creation of conditions and incentives for individuals and other actors to invest in education and learning.

**UNITED KINGDOM****Document**

*The Learning Age: a Renaissance for a New Britain* (Department for Education and Employment, 1998).

**Context**

Green Paper for England setting out the broad strategy of the new Labour government, seeking consultation on a range of issues.

**Main elements**

Advocates a regard for learning at all ages, from basic literacy to advanced scholarship, including formal and informal learning. Learning is seen as the key to prosperity and the foundation of success. The development of the spiritual side of individuals and of citizenship are considered important alongside economic objectives; the green paper stresses preparing citizens for active



participation in all spheres. Government role is seen as enabling citizens to take responsibility for themselves. Proposals include expanding further and higher education, creating the “University for Industry”, setting up individual learning accounts and promoting post-16 education, adult literacy, higher skill levels, and better teaching and learning standards.

#### Document

President Clinton’s Ten-point plan for education (Delci, 1997).

#### Context

The closest to a national mission statement in a country with multiple formulations of objectives which have mentioned lifelong learning for at least 20 years (*e.g.* College Board, 1978).

#### Main elements

Includes spirit of lifelong learning in many respects. Programme includes strengthening of teaching, independent reading by students by 3rd grade, parental involvement in early learning, making two years of post-secondary education the norm, improving adult education and skills, and connecting every school and library to the Internet by 2000.

#### UNITED STATES

*Source:* The information in the table draws upon background papers prepared by countries which participated in OECD’s activity on financing lifelong learning. This information has been supplemented by other national statements that have become available recently.

## 4. POLICY DIRECTIONS

Despite the popularity of the lifelong learning concept, Figure 1.1 shows that in terms of participation in organised learning activity, “lifelong learning for all” is far from being a reality in OECD countries.<sup>2</sup> What can countries do to implement strategies for “lifelong learning for all”? What are the key areas of such a system where policy reforms should be directed as a priority? What are the desirable features of such policy reforms?

In seeking to answer these questions, a review of the work done under the current OECD mandate suggests action in the following five areas of the lifelong learning system:

- a) recognising all forms of learning, not just formal courses of study;
- b) developing foundation skills that are wider than those traditionally identified as central, including in particular motivation and the capacity for self-directed learning;
- c) reformulating access and equity priorities in a lifelong context – by looking at opportunities available to individuals across their life-cycle and different learning settings;
- d) considering resource allocation across all sectors and settings;
- e) ensuring collaboration among a wide range of partners including ministries other than education.

2. Figure 1.1 brings together enrolment information in formal education and participation in adult education and training averaged (unweighted) for 18 OECD countries. The data combine two very different concepts and coverage, one based on full-time education and the other largely on part-time participation, defined as participation in any organised learning activity over a twelve-month period. The formal education data are drawn from national records of students enrolled in educational institutions and refer to 1998. The adult education and training data are based on a question in the International Adult Literacy Survey (IALS) about whether the respondent has participated in any organised learning activity for any length of time during the previous twelve months and refer to 1998 (or earlier in some countries). All full-time students aged 16-24 are left out of this calculation to avoid double-counting for the overlapping age-groups.

*In setting priorities for making a lifelong learning a reality...*

*... countries should consider action in five areas...*

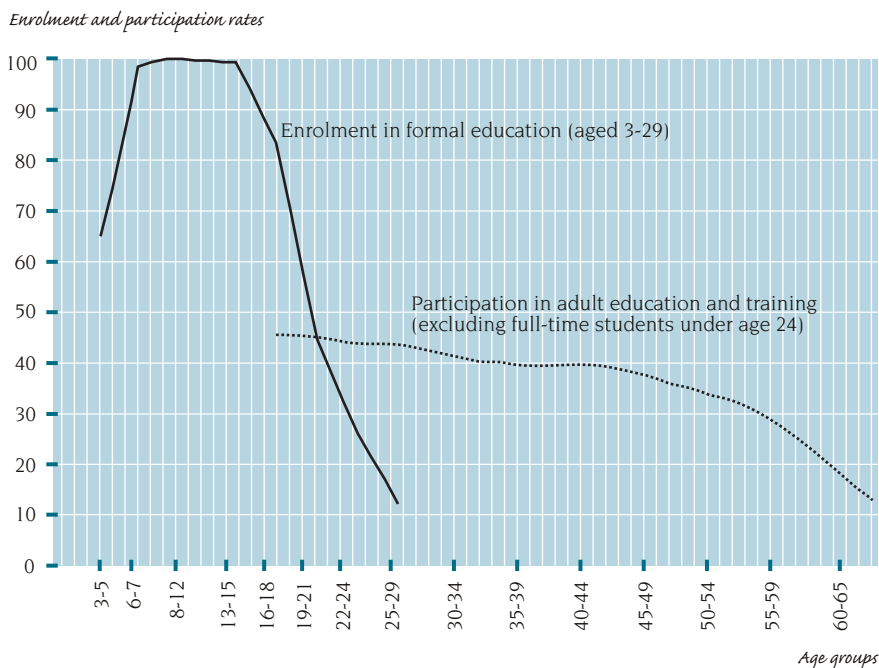
Enrolment in formal education is virtually universal during ages 4 to 15, but participation in some form of organised learning activity is not a reality for all.

... and are doing so in ways illustrated below.

Different forms of learning need to be recognised according to the true benefits they bring.

Figure 1.1 Participation in education and training over the life-span in OECD countries<sup>1</sup>

Percentage of age cohort enrolled in formal education (age 3 to 29) and participation in adult education and training (age 16 to 65), unweighted mean, for 18 countries, 1998



1. Australia, Belgium (Flemish Community), Canada, Czech Republic, Denmark, Finland, Germany, Hungary, Ireland, Netherlands, New Zealand, Norway, Poland, Portugal, Sweden, Switzerland, United Kingdom, United States.

Sources: OECD Education Database and International Adult Literacy Survey Database.

These five areas are discussed below, and, in each case, the system-wide issue is discussed in terms of broad policy directions in the specific sectors of provision where the principles are applied in practice. These guidelines are illustrated with specific examples taken from country experiences. However, the examples mostly relate to recent initiatives that have not been evaluated – they are best viewed as illustrations, not necessarily models of best practice.

### 5. VISIBILITY AND RECOGNITION OF LEARNING

Learning takes many forms and takes place in many different settings, from formal courses in schools or colleges to various types of experience in families, communities and workplaces. All types of learning need to become recognised and visible, according to their content, quality and outcomes rather than their location and form, for three main reasons. First, better recognition will include more learning within qualification systems, and qualifications systems are important in giving access to further learning and to jobs. Second, better pathways are needed between different sectors of education to avoid

### Box 1.1 Recognising informal learning

In **France**, 1985 legislation took steps to introduce a full-scale system for the identification and assessment of informal and experiential learning. It gave employees a right to an assessment (the *bilan de compétence*) of their professional and personal competencies as well as their motivation and aptitudes in order to facilitate both their professional and educational plans and careers (Colardyn, 1996). A national network of over 700 public and private organisations has been created that annually provides some 125 000 individual assessments. However, the *bilan de compétence* does not recognise competence in a way that leads to an educational qualification. To address this, 1992 legislation provided for the validation of skills acquired through work experience in a way that is directly linked to national qualifications.

Since the 1950s, **Norway** has had a legal basis for adult candidates to take final apprenticeship examinations based on their practical work experience. In principle, candidates must take the same final examination as apprentices. However, in practice they are exempted from general subjects, such as the Norwegian language and social studies. Use of this “Section 20” provision remained moderate during the 1970s and 1980s, but expanded greatly in the 1990s. By 1995, 41% of all trade certificates were awarded to Section 20 candidates. More recently, Norway has explored wider mechanisms for recognising informal learning. In 1999, it began establishing a national system to document and recognise, in the workplace and in education, adults’ informal learning. Pilot projects have begun to relate informal learning both to upper secondary education and to higher education using a mix of written and oral tests, age, self-evaluation, and relevant work experience. A May 2000 bill proposed allowing universities and colleges to admit students without formal entrance qualifications on the basis of age (25 years or more) and informal learning, and also giving them credit in their studies for non-formal learning. A range of projects has been initiated to investigate how informal learning acquired in family and community settings, and through work experience, can be identified, assessed and recognised in order to provide access to occupations, to provide credit or exemptions within formal education, and to provide certification.

educational dead-ends. Third, learners need better “signposts” to allow them to obtain the information and guidance needed to take full advantage of wider learning opportunities.

#### 5.1 Informal learning and qualification

Giving due recognition to learning that occurs outside formal education is complex and difficult. It requires standards and learning outcomes to be defined, against which such learning can be assessed. It requires agreed assessment techniques to be developed and agreement on recognition methods and portability of credits. Addressing these issues requires the active commitment and engagement of a number of stakeholders, within and between different education sectors as well as between those in education and groups such as employers and trade unions. And it requires policy makers to move beyond the development of attractive conceptual models to the creation of practical tools that are affordable and that can easily be implemented.

During the 1990s, many OECD countries struggled to give greater visibility to informal learning: to assess and recognise it; to give credit towards qualifications; and to provide forms of recognition that can enhance careers. However

*Systems to give due credit to none-formal learning must be carefully worked out through partnerships...*

*...but progress in doing so can be slow.*

in many countries, giving greater visibility to informal learning has proven to be difficult. Countries such as Germany and Austria have been reluctant to embrace the concept, perhaps in part due to the success of their strong apprenticeship systems. In the Southern European countries, the notion has been greeted positively, but legal and political moves to introduce the principle have often not been matched by substantial reform in practice. In the United Kingdom, acceptance of such recognition has been enthusiastic (Bjørnåvold, 2000). However the actual realisation of a workable system has proven difficult: issues such as the development of acceptable qualifications standards, and the reliability, validity and costs of assessments loom large (Wolf, 1995).

Notwithstanding these real barriers to recognition and validation of non-formal learning, models do exist that countries can learn from. Box 1.1 above describes interesting experiences in this vein, from France and Norway.

## 5.2 Creating pathways

During the 1990s, many OECD countries have been attempting to lay a better foundation for learning beyond the compulsory and upper secondary stages, and to eliminate educational dead-ends. This has involved tackling key barriers, by strengthening links between:

- General and vocational education at upper-secondary level, by bringing them closer together;
- Upper-secondary vocational education and tertiary study, by making it easier to progress from the former to the latter;
- Non-university and university-level tertiary education, by making it easier to move between them (OECD, 1998a; OECD, 2000a).

Hungary, Norway and Sweden increased the general education content of upper-secondary vocational pathways. The aim was to give students wider general and conceptual knowledge and skills that they would need in working life. At the same time people following these pathways were given better access to tertiary study. Denmark introduced reforms to achieve the same objectives. Norwegian evidence shows that these initiatives have made vocational pathways more attractive. In Sweden, students from nearly all vocational areas are now following through to further studies. However, in both cases some difficulties have arisen. Weaker students can struggle to cope with the higher demands of the general education subjects. Teachers sometimes find it difficult to relate the increased general education content clearly to the world of work. And vocational students normally gain access to further study only if they have done well in general subjects – with an implicit under-valuing of vocational studies themselves.

One mechanism that Austria has adopted to create pathways from upper secondary vocational education to tertiary education is “double qualifying” programmes, that qualify students both for work and for tertiary entry. These programmes are very demanding, and involve extending the total duration of

*Many countries are reforming learning pathways to make progression easier...*

*... for example by opening up new options to vocational students...*

*... including some courses qualifying students for both further study and work...*

upper secondary study. This initiative and Switzerland's *maturité professionnelle*, which has a similar outcome, have proven to be highly popular, both with young people and with employers. At the same time they can carry the risk of marginalising and reducing the status of the remaining vocational pathways that do not lead to tertiary study.

OECD countries have also improved pathways from secondary to tertiary education in other ways. One is to offer tertiary-level studies in secondary schools as in New Zealand and Advanced Placement programmes in the United States. Belgium (Flemish Community), France and the Netherlands have launched initiatives to encourage and enable students to consider the range of tertiary study options and their requirements. The Dutch “study house” initiative attempts to acquaint students early with the teaching and learning methods found at tertiary level. In New Zealand, the Qualifications Framework is an important aspect of an infrastructure that allows a learner to build a qualification. Experiments with the development of more unified approaches to national qualification systems – for example in the United Kingdom, Mexico and New Zealand – can be seen as attempts to grapple with many of the same issues.

The difficulties that have been experienced in creating links between upper secondary general and vocational education, and between upper secondary education and tertiary study, particularly at university level, are matched by barriers encountered in creating learning pathways between non-university-level tertiary study and university-level tertiary study. Credit transfer arrangements between sectors of tertiary education have not been easy to negotiate, and their translation into actual student flows has generally proven problematic. Recognition of prior learning, whether across tertiary education sectors or institutions or from outside the formal tertiary education system, remains an important target for tertiary education policy. Highly flexible non-university-level tertiary institutions – such as the Community Colleges in North America and Australia's technical and further education (TAFE) Colleges – can have many advantages in creating learning pathways. They can provide flexible entry points, offer remedial and foundation programmes for those lacking entry prerequisites, and provide programmes at several levels to allow individual students to meet a range of learning needs within a single institution.

### 5.3 Information and guidance

Flexible learning pathways make appropriate “signposts” for lifelong learners essential. Only sophisticated and effective education and employment information and guidance systems will allow students to find their way along the paths. Traditionally such services have received a low priority in many OECD countries. Inconsistencies within countries in objectives, resourcing, staff qualifications and delivery methods are striking. And whatever the weaknesses of national information and guidance services for youth, weaknesses and gaps in services for adults are even more evident.

Such services traditionally have been delivered in one of two main ways: on a one-to-one basis by professional counsellors; or by specialist careers teachers

*... or by introducing elements of tertiary study into secondary education...*

*... or improving transfer between different kinds of tertiary institution. But building such links has proven problematic.*

*The guidance and information needed has been lacking...*

*... and traditional delivery mechanisms are inadequate...*

*... but the UK has illustrated a way of informing adults of what is available.*

*Learning foundations require more than just access to basic schooling.*

*Young people need to be better motivated within school...*

*... and encouraged to complete upper-secondary education...*

within classrooms. The first model is very expensive when translated into greatly increased access. The second is generally not suitable to deliver careers services to adults. The challenge is to build comprehensive information and educational and occupational guidance systems, catering for both adults and youth, that are both high-quality and affordable.

The United Kingdom's *Learndirect* service is an innovative approach. Launched in 1998, it provides a single, free-access telephone number that allows adults<sup>3</sup> to obtain national information about learning opportunities. Initial inquiries are handled by basic information providers, with careers advisers available on-line for those with more complex inquiries: referral to the Careers Service is available for those whose needs cannot be met on the telephone. *Learndirect's* telephone help-line is complemented by web-based access. Its site also provides users with access to basic self-assessment techniques that can narrow information searches according to personal interests and skills.

## 6. FOUNDATIONS FOR LIFELONG LEARNING

Solid foundations for learning need to be established across the lifespan, not just by giving universal access to primary education. A broader conception requires countries to improve access to early childhood education, to improve young people's motivation to learn and their capacity to learn independently, and to address learning deficiencies in adults, as well as to focus on achievement standards and to try to raise the level of competence for all. Issues of access to early childhood education are discussed below in Section 7.1. This section discusses approaches to raising the motivation to learn among young people and adults.

### 6.1 Strengthening the motivation to learn for the young

Motivation to learn can be strengthened in several ways within the formal education system: by providing wider opportunities for work-based learning in upper secondary schools, by enhancing opportunities for student choice, by encouraging co-operation with institutions outside the school, by introducing more learner-centred pedagogy, and by introducing anti-bullying strategies to enhance student enjoyment of school and self-esteem.

To reinforce a solid basis for later learning during the transition phase, policies need to encourage both high rates of upper secondary completion and qualification and the attainment of strong basic skills by the end of secondary education. Evidence shows that young people without an upper secondary qualification and without strong literacy skills are among the least likely to participate in further education and training as adults, or as adults to take part in training within enterprises (OECD and Statistics Canada, 2000). Across OECD countries, some one in four 20-24 year-olds have not completed upper secondary education (see Chapter 2). However, there is wide variation across countries: from one in ten or less in countries such as Korea, the Czech Republic and Norway to a third or more in Italy, Spain, Turkey and Portugal.

3. Three quarters or more of all calls (around 1.7 million in 2000) to *Learndirect* are from those aged 25 or over.

An essential element of policies to encourage upper secondary school completion must be strategies to prevent students from leaving school early, and to identify and quickly re-enrol those who drop-out, allowing and encouraging them to complete a full upper secondary qualification. Denmark, Norway and Sweden are notable for the success with which they have put in place such strategies during the 1990s. They have been effective in keeping the number of early school leavers low, in reducing the proportion of school leavers who move immediately from school to unemployment,<sup>4</sup> and in substantially reducing the incidence of long-term unemployment among those under the age of 20.

If policies during the transition phase are to strengthen students' motivation to learn, they need to provide a range of appropriate learning environments and make provision for a range of learning styles. In practical terms, this requires the provision of:

- *Active and project-based learning*, within both general and vocational education pathways, giving young people opportunities to see learning in a practical context outside school, to assume control over their own learning, to develop a sense of civic responsibility, and to build links between theory and practice. In the United States, substantial emphasis has been put upon community service-based learning during the 1990s to achieve these goals. In Norway, formal requirements now exist for all students to take part in project-based learning on a regular basis, and teacher training and staff development programmes have been adapted to provide teachers with the skills to manage this form of learning.
- *A wide range of vocational education programmes*, able to meet the developing occupational interests and career goals of the full range of students, and broader combinations of general and vocational education, allowing the latter to develop skills and knowledge as a foundation for further education and training. Countries in which the great majority of upper secondary students take part in general education programmes experience particular problems in retaining motivation unless, as in Japan, steps are taken to introduce a strong link between school performance and access to jobs.
- *Opportunities to combine classroom learning with learning in work settings*. This is important to allow an early connection to be established between learning and working life in order, to motivate students, as well as to increase employment prospects. Such combinations have been common for many years in countries with strong apprenticeship traditions such as Germany and Switzerland. During the 1990s, Norway has strengthened its apprenticeship system to encourage higher participation by young people, including through the restructuring of training wages and of financial incentives for employers. In some countries where apprenticeship traditions have not always been strong – such as Canada, Sweden and the United States – notable effort has been devoted during the 1990s to the creation of school-managed workplace

... with intervention to address drop-out...

...and appropriate learning styles, which:

– make learning a more active and practical...

– meet students' vocational needs...

– give students work place experience, insuring that learning is well-managed and of high quality.

4. This is a particularly important policy outcome, given the strong relationship that exists between moving directly from school to unemployment and longer-term difficulties in settling into a stable *employment* pattern (OECD, 1998c).

experience programmes. School-managed workplace experience programmes have also grown rapidly in Australia. Whilst the evidence on the impact of these programmes on later employment remains unclear, there seems little doubt that they are highly popular with, and motivating for, young people. If opportunities are to be created for young people to learn in real work settings, appropriate incentives both for them and for employers need to be put in place. In the case of apprenticeship, these incentives typically take the form of youth training wages. Setting the latter at levels that provide appropriate incentives to both parties, and encourage wide participation, is a matter that goes beyond Education Ministries, involving the social partners and Labour Ministries. The incentives that are required to encourage school-managed workplace experience programmes to expand are less clear. OECD evidence suggests that the quality of the programmes is important in creating incentives for both parties. This in turn depends upon the quality of the support provided by education systems and the roles that employers are encouraged to play in programme design and management.

## 6.2 Motivating adult learners

*Adults too need to be motivated...*

Recent research has highlighted some of the techniques that are successful in motivating adult learners (U.S. Department of Education and OECD, 1999; OECD, 1999g). In general, adults are most motivated when they draw on past experience, when learning is located in the context of their own lives, when it is applied to real problems and when they have choice and control over what they learn. Preliminary results from the ongoing Thematic Review of Adult Learning suggest some more specific policy lessons:

*...by teaching them in distinctive ways...*

- **The need for appropriate teaching methods.** Recent research shows that where teaching does not suit the specific learning requirements of adults, they tend not to participate. Adults do not learn in the same way as children. Trainers and teachers of adults require specific training, to enable them to use techniques specific to adults in both formal and informal learning. Experience, for example in Sweden's Folk High Schools, shows that adult students prefer facilities that are not shared with young pupils. Developing settings for learning that are adult-centred, such as Sweden's Folk High Schools, Denmark's AMU and VUC Centres, or Australia's TAFE colleges, can help raise adult participation (see Box I.2).

*...by making learning more convenient for them...*

- **The need for flexibility in the scheduling and practicalities of adult learning.** Adults typically need options allowing them to progress at an individually determined pace, schedules that take into account such factors as work hours and/or children's school hours, easy access to transport facilities, and the availability of day-care facilities for children. The use of ICT can be of great assistance in offering greater flexibility. Distance learning is an available option that can provide learning to people who would not otherwise have the chance. However, while ICT can be of great help, participation should not be limited to those who have access to it. A key to the success of the Open University in the United Kingdom has been its use of regular mail, for example.

*...and by attracting those who have been put off learning...*

- **The importance of targeting adults who are hard to reach.** One approach with positive results is to separate the learning experience from assessment



of outcomes, in an attempt to make learning enjoyable. For some adults, better results are obtained if learning is approached as a fun activity, and not only connected to better wages, promotions or grades. A “soft entrance” into learning through introductory or orientation courses on how to learn, or short seminar courses without grades, can ease the entrance into the adult learning process. This approach is used by the Nordic Study Circles (in Sweden and Norway), the School-clubs Migros in Switzerland, and the EDAP programme in the United Kingdom.

A culture of learning is important for promoting adult learning. Such a culture has to be embedded in the whole society and not only confined to the educational system. An important determinant of this culture of learning is the degree to which governments and the social partners are convinced of the importance of the need to refresh and upgrade adult skills.

*...but more generally by developing a learning culture.*

### Box 1.2 Making tertiary education “adult-friendly”

**Australia** has a very large “adult-friendly” non-university-level tertiary education system. The largest element of the system is a network of 74 government-funded Technical and Further Education (TAFE) colleges at more than 100 campuses. These have much in common with the Community Colleges in Canada and the United States. The public system also includes some community-based providers, training providers in private organisations, enterprises and some provision within university-level tertiary institutions. Courses are provided in a very wide range of vocational fields, and at a wide variety of levels. Provision includes both programmes that lead to formal qualifications within a national qualifications framework and programmes that do not. Programmes can meet a wide range of educational purposes, ranging from the provision of complete recognised vocational qualifications; to the updating of specific vocational skills; to remedying deficiencies in basic education; to preparation for university-level studies; to hobby and recreational courses.

Colleges are widely dispersed geographically, and offer instruction on a full-time, part-time and distance-education basis. Most students enrol on a part-time basis, with the annual hours of attendance per student averaging around 200. Colleges are commonly open on evenings and at times on weekends, as well as during the day. Courses are organised on a modular basis, and students are able to enrol for specific modules as well as for a complete course. Around two-thirds of students enrol in programmes that lead to a formal national qualification, and a third in programmes that do not. Entry requirements are flexible, and commonly recognise work experience as well as formal secondary education qualifications. Many courses, particularly those that do not lead to formal qualifications, do not specify upper secondary qualifications as an entry requirement. Assessment procedures are also flexible, with around 6% of all assessments being made on the basis of prior learning or through credit granted for subjects completed elsewhere.

This has resulted in a system that is very “user-friendly” for adults, and in which adult participation has grown substantially during the 1990s. At the end of the 1990s, some one in eight Australians of working age (15-64) were participating in the system: among those aged over 30 around one in fourteen were participating. Between 1990 and 1999, total student numbers grew by 70%. However, the number of students aged 25 and over grew by 105% and the number aged 30 and over increased by 119%. In 1999 students aged 25 and over accounted for nearly two thirds of all students, and those aged 30 and over for almost half.

*Equity can be seen in terms  
both of gaps in provision  
and of serving diverse needs.*

*In early childhood, countries  
differ both in the level of  
provision...*

*...and in their approach  
and objectives...*

## 7. ACCESS AND EQUITY

Access and equity are enduring concerns in education. Chapter 3 in this volume discusses equity issues in much greater detail and also addresses the emerging risk of a “digital divide”. It highlights the “vicious circle” of some inequities that can only be broken through preventive action, which can be cost-effective in avoiding social expenditures in later phases of the life cycle. The focus here is the particular light that the lifelong learning framework throws on access and equity issues. These can be looked at in two ways. First, what provision is made, and how many people participate? Gaps in access are particularly evident in the areas of early childhood and adult years. Second, how do systems provide for increasingly diverse learner needs? As was noted in the preceding section, increased diversity of learning methods and options can help raise upper secondary completion rates and combat early school leaving. They can also be a major factor in raising access to tertiary education and adult learning.

### 7.1 Gaps in access

#### *Early childhood education and care services*

In about half of the OECD countries with relevant data, fewer than half of children participate in pre-school programmes before age 4. OECD countries have been prompted in recent years to expand services for young children in order to raise women’s participation in the labour market. But more fundamentally, high-quality, early learning environments form part of the foundation stage of lifelong learning. Neurological research suggests that brain development is remarkable in the early years. Research on the effects of programmes for young children suggests also that those who participate in a quality early childhood education and care environment are likely to develop higher-order reasoning and problem-solving skills.<sup>5</sup> They are also helped to make effective transitions to compulsory schooling, to be more co-operative and considerate of others, and to develop greater self-esteem. Thus early childhood education and care has the potential to maximise children’s motivation and to prepare them for a lifetime of learning (OECD, 1999a).

There are considerable differences among OECD countries in the importance they attach to education in the early years. There are also differences in how educational purposes might best be approached. In countries such as Denmark, Sweden, Finland, Norway and Italy, the educational emphasis tends to be placed upon the social and personal development of the child, with early childhood largely being seen as a phase in its own right. In the case of Denmark, this philosophy results in deliberate decisions to postpone the development of literacy and numeracy skills until the beginning of compulsory schooling. In other countries, such as the United States and the United Kingdom, the educational emphasis within early childhood services tends to be upon using these as a way to prepare the young child for primary schooling, and a stronger stress is placed upon the development of literacy and numeracy skills. These

5. Early childhood education and care includes all arrangements for children from birth to compulsory school age, regardless of setting, formality, funding, opening hours, or programme content. Within this framework, “care” and “education” are treated as inseparable concepts with regard to policies and provision for young children.

two approaches have much in common and are often pursued simultaneously, but they do highlight an important, and unresolved, debate about appropriate ways to use the early childhood services to lay a foundation for lifelong learning. Should the kindergarten encourage children to acquire rudimentary literacy and numeracy skills (fine motor skills, recognition of shapes, decoding and the like) or should it promote the child's social skills, aptitude for discovery learning, and pleasure in learning in the belief that these are equally as important for later learning? What degree of emphasis should be placed upon each of these strategies?

Despite these differences and the unresolved questions, the Thematic Review of Early Childhood Education and Care Policy carried out by the OECD from 1998-2000 shows that in a majority of countries there is significant unmet demand for provision. Participation by three year-olds varies very widely. In France, Belgium, Italy, Iceland and New Zealand, nearly all children of this age participate; in Germany, the Czech Republic and the United Kingdom some 50% participate; yet in Canada, Ireland, the Netherlands and Switzerland the participation rate is around 5% or less (OECD, 1999a).<sup>6</sup> Many challenges remain to fund and organise this first stage of lifelong learning in order to promote *quality* and *access* for all children and across all forms of provision.

In some countries, there are certain populations with limited access to early childhood education and care: children from low-income families, children living in rural areas, and children with special needs. This raises serious equity issues. A range of different funding sources – public, private, business and parents – usually share the financing of early childhood education and care services. However, public investment by national and local government is a key factor in ensuring fair access for low-income families. Without a pro-active stance from the government, there is a large risk of a two-tiered system developing, with well-funded infrastructures for the upper income groups co-existing with poor-quality facilities and materials for children from low-income groups.

### *Encouraging adult learning*

As noted in Figure 1.1 above, about two-thirds of the adult population in most countries do not participate in organised learning activities, measured over a twelve-month period (OECD and Statistics Canada, 2000). OECD work on the training of adult employees (OECD, 1999b) reveals significant differences between OECD countries in access to job-related training. More importantly, it shows, both within and between countries, that access to job-related training tends to reinforce existing inequalities in levels of educational attainment. This finding emphasises the importance of high levels of initial education, and of an equal distribution of levels of initial educational attainment, as a solid basis for encouraging wider participation by adults.

6. These data cover participation in only the formal and centre-based activities. Participation rates would likely be different if all early childhood education and care options were included. In the Netherlands, for example, around half of the 3 year-olds attend playgroups, and children at this age or younger are increasingly in day-care programmes. In England, 86% of 3 year-olds were enrolled in validated education programmes either in school or non-school settings and coverage is of a similar order in Scotland and Northern Ireland.

*...but clearly leave some demand unmet...*

*...and need particularly to think of underserved groups.*

*Adults too have uneven access, with the least educated participating least...*

*...and to address this, policy must address not just the nature of learning programmes, but the characteristics of workplaces.*

Policies that can help motivate adults to learn were discussed in Section 6.2 above. How can the supply of learning opportunities, specifically in the workplace, be structured to improve access? Policies need to focus not just on specific characteristics of employee training programmes, but also on the organisation and structure of work and of enterprises, in ways that encourage competence-building and learning. Recent OECD work on knowledge management points out that learning need not be seen just as an accidental by-product of working life, but can be a deliberately engineered outcome of the ways in which organisations work. Learning-rich workplaces can be triggered in a number of ways: decentralised and flatter management structures; encouragement of employees to reflect upon their experiences; the use of team-based production; and through exposing workers to new problems in the production process (OECD, 2000d). Learning-rich workplaces are also stimulated by external factors such as an increasingly competitive business environment and by technological innovation (Smith, 2000). To the extent that these internal and external factors have been treated as matters of public policy, they have most typically fallen within the ambit of ministries of regional development, industry, technology or industrial relations. This observation serves to reiterate the importance of seeing lifelong learning as an integrated, and integrating, policy framework, and not just as a matter for education portfolios.

## 7.2 Diversity and access

*More provision is not enough if it is not sensitive to diverse needs...*

The increased diversity of learners, learning options and learner pathways poses challenges and opens up new approaches to address issues of access and equity. Evidence shows that expansion of education opportunities alone does not appear to reduce differences in participation rates between socio-economic groups (Chapter 3 of this volume). The segmentation across learning options, pathways and combinations is a major hurdle in meeting the diversity of learner needs and serves as a disincentive to participate. At tertiary-level studies, the ways in which standards are set and students are assessed appear inadequate to take in the very wide range of programme objectives, teaching methods and needs of individual students (OECD, 1998a).

*...for example by adapting upper-secondary curricula...*

Section 6.1 highlighted several approaches to strengthen the motivation to learn for the young by developing a range of pathways. Increased demand for a wider range of pathways has encouraged greater diversity at **upper secondary** level (OECD, 2000a). The OECD's work in this area has also highlighted the importance of making special provision for those having the greatest difficulty in coping with upper secondary education. This can be through a separate curriculum within the normal high school, specifically tailored to the weaker students, as in Sweden's Individual Programmes, in which some 11% of upper secondary students enrol. Or it can be through separate institutions with distinct pedagogical approaches, as in Denmark's Production Schools. In each case care is taken to ensure that the separate provision that is made for weaker students is not an educational dead-end, but provides opportunities for young people to rejoin the mainstream and complete an upper secondary qualification. In Australia, TAFE colleges (see Box 1.2 above), although not specifically designed for the weaker upper secondary students, are entered by many young people who leave upper secondary school early, and offer a more adult-centred learning environment that many young people find attractive.

Greater diversity of options also plays a role in **tertiary**-level participation. Some OECD countries – such as Canada and the United States – that have quite diverse tertiary education systems also have high levels of tertiary participation. Increased diversity can be achieved in many different ways: provision at non-university level; short-cycle degrees; vocationally-oriented university institutes; private-sector tertiary provision; expansion of distance learning and programme-level variation. Some OECD countries are giving priority to new forms of tertiary provision. For example, Hungary's tertiary education system introduced legislation in 1997 providing for the creation of new short-cycle accredited higher vocational education programmes intended to have a closer link to industry than traditional university courses. Sweden has taken similar steps, introducing short-cycle qualified vocational education tertiary courses in a 1996 pilot programme, that are open both to school leavers and those with work experience. Finland's 1992 reforms created polytechnics to provide more occupationally-oriented tertiary education, alongside the more theoretical and research-focused university qualifications. Mexico's new technological universities, similar to the French vocationally-oriented university institutes (IUTs), offer two-year, applied study courses aimed at labour market needs. Although recently introduced and still small in terms of numbers of institutions and students, the initial experience has been positive in terms of student quality and graduate employment. In the Czech Republic, 1998 legislation provides for more diverse tertiary education institutions and courses, although its implementation is still rather limited.

Another element of increased diversity of options is through wider study choices. The French IUTs provide study programmes with a greater emphasis on application. In addition, individual French universities are developing more distinctive profiles through the process of a contracting policy that provides funds to the institution on the basis of an institutional plan negotiated with the Ministry. Contracts specify agreed outcomes and may include partnerships with regional authorities, enterprises or other tertiary education institutions. Finland, which employs a similar contracting approach, allocates all funds through this means.

The growth of private tertiary education provision can offer another means of introducing greater diversity. Japan, Korea and the United States have large and diverse private sectors; in Mexico and Portugal, private-sector enrolment accounts for about one-fourth of the total. In many countries, public universities have established new corporate entities to ease and benefit from entry into a growing adult market for tertiary-level course modules, whether bearing academic credit or not. Other entrepreneurial corporate providers offering high-quality tertiary education now operate internationally as well as in national settings. The University of Phoenix, now the largest private university in the United States, offers degree studies in professional fields through learning sites located throughout the U.S. and internationally. Corporate provision in the IT field is now well-established (*e.g.* Microsoft, Sun Microsystems, Cisco), leading to certification on criteria set down by the industry (the counterpart of the involvement of professional bodies in advising on or setting degree standards in such fields as medicine, engineering, accountancy and law).

*...and providing more options at tertiary level, such as short-cycle courses...*

*...and choices of more applied forms of study...*

*...along with more privately provided options...*

...and an expansion of  
distance learning.

Distance education options have also expanded. Free-standing Open Universities in the United Kingdom, the Netherlands, Germany and Japan all serve clientele not easily reached by residential study options, including adults whose work or family responsibilities make attendance difficult or impossible. Traditional universities and further education colleges have expanded their own distance education provision, which in the mid-1990s still accounted for a larger share of non-residential enrolment than free standing institutions or other options. In an effort to harness the capacity of the region's institutions, the governors of the western US states established a virtual university, the Western Governors' University, to make available to learners in the region – and outside – the full range of study options and course modules across all of their state systems.

This has led to  
reconsideration of what  
makes a first degree.

At the programme level, there is considerable discussion on how the contents of the first tertiary-level qualification can be reshaped to provide a greater diversity of options. The Sorbonne/Bologna pan-European debate on a short first degree is an example of such discussions. In Denmark, Norway, Portugal, Germany and Finland (in the latter case, for a new formulation of the present long first degree), there is more discussion of vocational orientations of the first short degree. Likewise, there is support for better integration of general and specialised components of the bachelor's degree in Japan. Other approaches include encouraging or permitting various forms of cross-border, cross-segment and cross-level co-operation. Examples of this include franchising in the United Kingdom, specific linking arrangements in the United States and New Zealand, and joint degree programmes in the Netherlands.

Investment in learning can  
pay off, if done carefully...

## 8. RESOURCES FOR LIFELONG LEARNING

Investment in lifelong learning carried clear benefits, both economic and social (OECD, 1998*b*; OECD, 2000*c*). Public authorities wishing to implement lifelong learning strategies need to consider three aspects of resources. First, *adequacy*: are they *adequate* to support lifelong learning for different types and settings of provision and over different phases of lifecycle? Second, *efficiency*: are resources well used or are there efficiency gains to be reaped? Third, *funding sources*: if more resources are needed, who will pay for them and how can the resources be mobilised?

### 8.1 Adequacy and allocation of resources

...though appropriate, well  
allocated resources...

Whether or not current resources are adequate depends on how one interprets the goal of lifelong learning for all. The previous section on access and equity pointed to gaps in participation – see also Chapter 2 in this volume. Although many Member countries have set participation targets for individual sectors, none has set targets for the whole system of lifelong learning. Even if targets in each sector were identified, it would be extremely difficult to estimate the total costs involved in meeting them (OECD, 1999*e*).

...and by using resources  
efficiently...

Higher levels of participation will, in general, increase overall costs, but the magnitude of the increase will depend on a number of factors. The costs per unit of provision will be lower if existing available capacity can be used to cater to additional participants, as may be the case for distance learning.

Additional costs will be greater if the provision needed for the added participants must be organised in different ways, for example, to cater for poorly qualified adults. For some new patterns of lifelong learning, for example, part-time adult learning, the marginal costs may be lower than for the full-time studies in tertiary education. Despite the difficulty of developing precise cost estimates of different policy targets, it can be said with some confidence that even modest targets, taking the needs of young people as well as the adults into account, will require expansion in capacity (OECD, 1999e).<sup>7</sup> More resources will be needed if progress is to be achieved in reaching key goals: wider access to early childhood education and care, universal completion of upper secondary education, and greatly increased participation in adult learning.

## 8.2 Making more efficient use of resources

Greater efficiency in the use of existing resources offers one approach to meeting the demand for expanded learning opportunities. Member countries are using a variety of approaches to reduce the cost of provision and improve its quality. Efforts have been made in particular to cut teaching and personnel costs, to rationalise the structure of provision, to make better use of ICT and to make more extensive use of the private sector.

### *Reducing teacher costs*

The salaries of teachers and other personnel are the largest cost in the formal education system – on average they make up 82% of all current expenditure at the elementary and secondary levels and somewhat lower at the tertiary level. This proportion is increasing as the age profile of the teaching population rises. So any country that wants to make education systems more cost-effective must scrutinise teaching costs closely. A reduction in the number of young people entering secondary and tertiary education over the next few years does not necessarily reduce teaching costs in the short term. Teachers are often on permanent contracts and are not easily moved into areas where participation is rising, such as adult education.

OECD countries are pursuing a number of strategies to achieve savings in teaching and personnel costs (OECD, 1999e). Variants of higher student-teacher ratio have been used in Hungary, Italy, the Netherlands (during apprenticeship training), and Sweden (excepting upper secondary and special needs schools). Other approaches include restructuring the school system to reduce the number of teachers (Italy), reduced in-service training in school time (Austria), flexible contracts (Austria), reduced cost of sick leave and disability for staff (Netherlands), distance learning measures (Hungary, Japan and Norway) and greater use of teaching assistants in universities (Japan).

7. Recent OECD work (OECD, 1999e) has estimated the expansion in capacity that would be required if participation rates were to rise to meet certain policy targets: at the pre-school level; for 15-19 year-olds; for 20-24 year-olds; and for adults. The analysis suggests that in many countries higher participation at the pre-school level and for 15-19 year-olds can be achieved with only a modest increase in resources. However, for 20-24 year-olds and for adults, higher participation rates would require a substantial expansion of capacity in many countries.

*...and countries have looked at various measures...*

*...for example making best use of teaching resources...*

*...through a variety of approaches...*

*...which must be balanced  
with the need for quality.*

However, measures that cut teaching costs may conflict with the need to attract and maintain a high-quality teaching service. Many countries already find it more difficult to attract and retain younger teachers (Chapter 5 in this volume). They must strike a balance between reducing teaching costs and enhancing the quality of lifelong learning.

#### *Rationalisation of provision*

*Demography points to  
rationalisation of school  
provision...*

As a result of demographic trends, many countries are looking to rationalise their compulsory and upper secondary education systems and increase the funding available for other parts of the system (OECD, 2000b). The Netherlands, for example, has been involved in a “merger wave”, which started in 1990. Since that date, a number of general secondary schools have merged to form larger comprehensive schools, in order to promote more efficient use of accommodation and equipment, and to reduce capital expenditure. In Austria, schools are reducing the number of lessons in some curriculum areas and limiting expenditure on textbooks.

*...while tertiary education  
may be made more cost-  
effective if it focuses on  
reaching desired outcomes.*

In tertiary education, the approach can be described as a focus on making provision more flexible and responsive and, potentially, more cost-effective. The Czech Republic, the Netherlands and Sweden, for example, are focusing on the length of student programmes and are considering setting a fixed length of study time for degrees. In addition, Austria and the Netherlands are rationalising the number and type of courses on offer and, in some cases, the number of institutions where particular courses may be offered. Hungary is looking to increase the provision of courses that are shorter than traditional university degrees; Austria is improving the flexibility and speed of the processes required for the introduction of new courses. Both Austria and Hungary are increasingly introducing modular and individually tailored student programmes. One indication of inefficient use of resources, especially relevant for tertiary education, is the high non-completion rate. High drop-out rates are costly as they waste the efforts of students and institutional capacity and are detrimental to future participation in lifelong learning. To ensure student retention and achievement, provision must be more attractive and relevant. To this end, Austria has introduced an induction period for university students, which has helped to increase retention and to prevent costly course changes. Italy has required universities to check the background knowledge of incoming students in core subjects. The Netherlands has laid a greater emphasis on the selection and referral of students in the first phase of higher education to avoid high drop-out rates. Hungary is planning to rationalise university courses and institutions so that larger more comprehensive institutions will be more cost effective than a system of small, scattered and often specialist institutions. In Australia and Belgium (Flemish Community), a drive for effectiveness and quality motivated consolidation in tertiary education in the first half of the 1990s.

Comprehensive financing strategies are being used by several countries to promote efficiency as well as participation of adults. For example, policies to encourage improved efficiency seek to shift funding to an outcomes basis. The Danish “taximeter” approach is among the more innovative (see Box 1.3).



### Box 1.3 Danish taximeter system

Under this scheme, funding for students is limited to the period of active engagement in study, which can occur in a continuous period without break or with stop-outs. Funding for institutions becomes available only when students pass their examinations. The scheme provides an incentive to providers to improve the efficiency of their programmes by allowing them to retain any excess in taximeter rates over the actual costs, and forcing them to pay any costs in excess of the taximeter rates. After several years of experience with the scheme, two issues of note have arisen:

- *The open-ended nature of the taximeter obligations.* Because the taximeter payments are guaranteed to approved institutions as long as they enrol students, it is possible, in principle, for them to enrol large numbers of persons, without limit. To address the budget uncertainty arising from this, the authorities agreed to create, from 1999, a reserve of 1-2% of the total allocation for the scheme to cover unforeseen surges in enrolments.
- *Inefficiencies arising from the gap between the actual cost of provision and the amount reimbursed by the taximeter scheme.* If the taximeter rates are adjusted too frequently to take account of efficiency gains, providers may have reduced incentive to pursue efficiency-enhancing innovations. If, on the other hand, taximeter rates are adjusted too slowly, there may be a loss in overall efficiency of the total expenditures to the extent that some providers continue to use less efficient methods. Although the ministry has no intention of recapturing the “profits” realised by those institutions whose actual costs are below the taximeter rates, there may be some adjustment in the rates to improve overall efficiency of the system.

#### *The role of the private providers and competition*

Many OECD countries are relying on expanded private capacity and increased competition in the provision of learning opportunities as a way to improve efficiency and to increase capacity. Japan has relied on private providers in all sectors of education and training for some time; the rapid expansion of participation in higher education could not have been achieved without this type of provision. Hungary and the Czech Republic have both passed legislation (in 1990 and 1998, respectively) to allow the establishment of private universities to help generate new capacity and encourage cost-effectiveness. The Danish Ministry of Labour relies entirely on outside, although government funded, providers for the provision of all its training and learning opportunities. Half are purchased from adult education providers supported by the Ministry of Education; the rest are purchased from technical/commercial colleges and business schools. Outcomes are certified in the same way, regardless of the provider. In Austria, authorities are developing a form of accreditation for local and foreign private institutions of higher education as a means of increasing the scope and scale of opportunities.

#### *The use of ICT for increasing cost-effectiveness*

Information and communications technologies (ICT) are seen by many OECD countries as among the most effective ways of increasing and widening participation in lifelong learning while keeping costs down to an affordable

*In many countries private provision plays a part in improving efficiency.*

*Wider use of ICT can keep costs down while widening opportunities.*

level. Sweden's Forestry Project Initiative (Box 1.4), designed to address employers' needs for a more highly educated workforce, provides an example of how ICT is being used to increase cost-effectiveness in the adult education sector. The study programme offered is considered to be more attractive than institutionally-based teaching programmes to potential participants, because they do not have to bear the costs of foregone earnings or accommodation costs often associated with more conventional educational provision. In addition, the contribution of the employers is lower than with conventional provision because they do not have to bear the cost of production losses. There is thus a greater incentive for both employees and employers to invest in this type of education.

#### Box 1.4 Forestry Project Initiative in Sweden

The aim of this project is to provide shift workers in the forestry industry with upper secondary level education in the core subjects of mathematics, chemistry, physics, Swedish and English. Tuition is carried out mainly through distance education and with the support of supervisors and new technology such as computers and interactive video. Education takes place mainly outside working hours, but in close proximity to learners' homes or workplaces.

Paper and pulp is a processing industry with production methods that are highly computerised and automated. Working as an operator imposes great demands on technical knowledge. Companies have great difficulty in recruiting personnel with a three-year upper secondary education, which in practice is the lowest theoretical educational background needed to manage the technology of the manufacturing process. Employees must also have good basic knowledge to acquire the necessary competence and technical education. By educating existing personnel in core subjects at the upper secondary level, the companies solve the problem of obtaining personnel with sufficient basic knowledge, at the same time as maintaining their existing skills.

Employees in the paper and pulp industry work shifts and have working hours which make it impossible for them to carry out part-time studies in traditional adult education. Socio-economic factors also make it more difficult for them to stay away from work and family too long. Moreover, longer absence from work would result in the loss of their current skills. This project is designed to address all these issues.

In January 1998, 12 paper mills were participating in the project and 231 employees were taking part. These mills are located all over Sweden and are typical of the industry in terms of capacity and number of employees. The project is managed by a steering group made up of a representative from the educational organisers, the employers and the industry's trade union.

A type of partnership approach between government, employers and individual learners underpins this project. The employers take responsibility for providing suitable premises for learning centres equipped with the necessary ICT close to their factories. They are also responsible for paying supervisors. For its part, the government has granted SEK 1.4m per year over the three years of the project. The employees' side of the bargain is to be prepared to study outside working hours.

### 8.3 Mobilising new resources

There are strong incentives for investment in human capital for both individuals and the firms. Individuals with more education have better employment and pay prospects. The additional earning associated with tertiary education is higher than for completing upper secondary education. Enterprise-based training can produce gains to both individuals and firms. Dispersed evidence indicates that training does improve productivity, with about half the gain distributed in wages (OECD, 1999e). Over the 1990s, the private share in total financing of education increased, and a clear trend in favour of greater private contributions is visible in many OECD countries (OECD, 1999e). Private contributions are most prominent at the tertiary level, in the field of adult learning, and for early childhood education. Countries are experimenting with financing mechanisms that provide incentives for greater private investment in these areas. This section reviews some of the initiatives to promote wider private participation in financing tertiary-level studies and adult learning.

At **tertiary** level, there are a number of examples of innovative mechanisms to secure learner or third-party support: means-tested tuition fees in the United Kingdom, deferred, income-contingent and differential contributions in Australia. In New Zealand, tertiary tuition subsidies are available to all students irrespective of age or previous study.

New policies in the United Kingdom, France and the United States introduce new types of tertiary-level education eligible for funding. In the United Kingdom, Individual Learning Accounts (ILAs) are topped up with subsidies or discounts to help people undertake learning, from the public budget, and it is expected that most ILA-supported learners will choose among learning options through the services provided through *Learndirect* [the brand name of the University for Industry (Ufi)], which is a brokering and information body (see Box 1.5). In the US, greatly expanded tax breaks for education now allow learners to deduct from their taxes part of the costs of tertiary education studies. Learners

*But expansion requires new resources to be mobilised, including from the private sector...*

*Some countries are changing tuition fee systems...*

*...or widening the types of tertiary study eligible for public support...*

#### Box 1.5 Use of new technologies

**The University for Industry (Ufi) in the United Kingdom** is a new initiative to provide a national on-line and distributed learning network. It became operational in Autumn 2000. It is intended to be a new kind of organisation, working in partnership with the public, private and voluntary sectors, to promote and broker open and distance learning. The objectives are to stimulate demand for lifelong learning amongst businesses and individuals and promote the availability of, and improve access to, relevant, high-quality and innovative learning, in particular through the use of ICT.

Using modern digital technologies, the Ufi brokers high-quality learning products/services and makes them available at home, in the workplace and in a network of *Learndirect* centres countrywide. It aims to break down barriers to learning by making provision more flexible and accessible, by stimulating new markets to bring down costs, by offering clear, reliable information and advice and by providing opportunities for people to learn at their own pace and in convenient locations. It will promote learning ranging from the basic skills of literacy and numeracy to specialised technological skills and business management.

*...but adult education remains of low funding priority, with some exceptions.*

enrolling for as little as one course module, in a wide variety of tertiary education institutions, may claim the credit.

Funding for **general adult education** is often precarious. It tends to receive low priority in central government education budgets and local funding can be subject to the vagaries of local government financial situations. Public funding systems often lack efficiency incentives and there tend to be few mechanisms for monitoring the quality or benefits of adult education provision. One interesting example is Denmark where most of the direct costs of adult education and training are borne by the state, or regional or local authorities, through the taximeter payments and other forms of institutional support. Individuals and enterprises pay a lesser portion of the direct costs. For example, 60% of the Folk High Schools' revenues come from the state, with the balance from individuals and private companies. Student fees pay 20–40% of the costs for Open Education courses. In the adult vocational training programmes operated by labour market authorities, the share paid by enterprises for their employees ranges from nothing, for training that uses standard courseware, to 100% for training that uses tailor-made curricula. Where a trainee allowance is paid by the state (in cases where training leave for employed workers is not paid), the employer pays a share calculated in the same way (up to 100% for tailor-made courses).

## 9. POLICY CO-ORDINATION

*OECD reviews have demonstrated the need for co-ordination among stakeholders – in provision for adults, for young children and for young people in transition.*

As lifelong learning involves stakeholders beyond education ministries – learners and their families, institutional and other providers, and social partners – co-ordination in policy development and implementation is essential for success. The thematic reviews conducted by the OECD during its current mandate have highlighted both the challenges of co-ordination and successful initiatives countries have taken in addressing them. The thematic review of early childhood education and care policies puts emphasis on co-ordinating education, health, social and family policies in providing access to quality education and care services for all children. The thematic review of adult learning emphasises the close interaction that is required between education, training, labour market and social policies in meeting the needs of adult learners. This section uses examples from the thematic review of the transition from initial education to working life (OECD, 2000a) to illustrate some of the challenges of co-ordination and lessons for policy.

*The case of young people in transition illustrates particularly powerfully...*

The transition review illustrates a wide range of experiences on how countries are attempting to solve co-ordination challenges:

- Through different ministries and agencies working together;
- Through the involvement of employers, trade unions and other actors in policy development nationally and in programme delivery locally;
- Through community involvement in local policy development and programme implementation.

Based on these experiences, four conclusions can be drawn about the relationship between policy development and programme implementation

processes on the one hand, and some key labour market and educational outcome indicators such as employment rates and qualification attainments on the other.

First, in those countries in which different government portfolios harmonise their policies, and co-ordinate their claims upon public resources, some of the more difficult transition problems that young people experience can be addressed more readily. For example in Norway and Sweden there is broad agreement that young people under the age of 20, and in Denmark, those under the age of 18, shall be the responsibility of local authorities, and hence primarily of the education system, rather than of the public employment service. This has enabled clear agreement to be reached that the principal goal in assisting early school leavers should be school re-entry so that an upper secondary qualification can be gained. It prevents education and labour competing for funds targeted at young people at risk in the labour market. And it prevents the placement of poorly qualified early school leavers in low-skilled and insecure jobs being used as a success measure in judging policy effectiveness. These policies are associated with low, and declining, rates of long-term unemployment for those under the age of 20 in these countries.

Second, countries with nationally-negotiated collective agreements tend to experience better transition outcomes than do those countries in which such matters are more typically left to local and individual discretion. These national agreements affect many of the key arrangements to aid young people's post-school transitions – work-related curriculum, certification arrangements, wage rates, employer roles and responsibilities – which are set out, often at the level of the industry, between governments, employers, and most typically trade unions. Both in strong apprenticeship countries like Germany and Switzerland and in others such as Denmark, Austria and Norway where apprenticeship plays a smaller role, positive outcomes for young people are associated with strong involvement by the social partners in setting the frameworks for youth transition – in vocational schools, in career guidance and in labour market programmes.

Third, in such countries, close involvement of the key partners is not simply evident in policy development. It can also be observed in the on-going implementation of these frameworks: in helping to assure quality through selection of students and employers; in assessment of students; in curriculum revision. This is a particular feature of apprenticeship arrangements in Austria, Denmark, Germany, Norway and Switzerland. It can also be observed in the strong role played by employers and the trade unions in the day-to-day management of the technical, agricultural and commercial colleges that form the backbone of Denmark's vocational education system for youth.

Finally, this involvement extends beyond the national level to the local and regional levels. Countries that experience good transition outcomes for their youth generally do not simply leave all of the action to national peak bodies. Extensive involvement of employers, trade unions, and communities can be seen at the local level: in providing career guidance and career information; in making local safety nets for early leavers work; in local work experience and community service projects. In Austria, for example,

*...that co-operation between ministries pays off...*

*...that nationally-negotiated agreements can play a useful role...*

*...that day-to-day co-operation enhances policy-level agreements...*

*...and lastly the importance of local-level co-operation...*

*...but emulating successful countries is difficult, because there are many pieces to the jigsaw...*

*...however some countries have been able to improve the institutional frameworks.*

employers and trade unions have a strong involvement at the local level in providing career information and advice to young people. In Norway, local employer organisations host training circles that allow resources for apprenticeship training to be more widely accessed by small and medium-sized enterprises.

Many countries that have had less effective transition outcomes have been inspired by these examples, and in some cases have tried to copy some of their features. Often this copying, for example, of the German-speaking countries' dual system of apprenticeship, has been less than successful, because only some parts of the jigsaw – national co-operation in policy development, the involvement of the parties in programme implementation, or local initiatives that involve the partners – have been adopted, but not other key ingredients. Part of the difficulty in adopting the policy and implementation frameworks observed in countries with successful transition outcomes is institutional; *e.g.* the lack of well-organised national employer bodies with a strong network of regional branches.

Nevertheless, some countries have shown that institutions can be subject to major reforms, and effective new institutions can be created. For example, four decades ago, Japan introduced national legislation giving schools responsibility for graduate job placement in co-operation with local employers and took this role away from the national public employment service. The strong relationships between schools and firms that this has encouraged have been a key explanation for the effectiveness of its transition outcomes for youth. In the 1990s, Hungary, in introducing a modern framework for vocational and educational training to replace the system linked to former state-owned enterprises, passed legislation to require compulsory membership of employers' chambers, and gave these bodies powers over apprenticeship quality control that closely matched those in German-speaking countries. Australia, for example, has put in place a large national programme – the Jobs Pathway Programme – to help connect employers and schools and further education institutions. This programme has much in common with the relationship between schools and firms observed in Japan. Several countries are taking steps to develop new institutional frameworks for the transition that suit their own national circumstances. The experience of the transition review shows that governments have an important role to play in co-operation with others in making such change possible. In Australia and the United States, for example, governments have played a strong role in attempting to stimulate strong local partnerships between firms and schools. The Australian government has created a national independent yet government-funded body – the Australian Student Traineeship Foundation – to stimulate these partnerships and help to improve their quality. Australian experience has shown that such national government support can be an important stimulus provoking employer organisations to begin developing frameworks to support local initiatives. In the United States, the 1994 School-to-Work Opportunities Act provided funds for the stimulation of local and regional partnerships between school and employers. Canada's experience has shown that, without such clear government support, workplace learning partnerships for youth in transition are far more fragile.

## 10. CONCLUSIONS

This review shows that there are grounds for optimism and grounds for caution in assessing the delivery of lifelong learning in OECD countries. The optimism arises from the fact that many pieces of the lifelong learning jigsaw can already be widely observed in OECD countries. The caution arises from the fact that no country has yet put them together to complete the jigsaw.

In 1996, OECD Education Ministers articulated a “cradle-to-grave” vision of lifelong learning that was substantially broader than the notions of adult education or recurrent education that had tended to shape debates on lifelong learning up to that point. This review shows that the broader concept has been embraced at the political level. But at the level of practical policy development and implementation, responses have neither been consistent nor uniform. There is little evidence of wholehearted pursuit of lifelong learning strategies at the *system* level, for example through setting system-wide policy targets. That progress that has been made is in moulding reforms in various sectors of provision in the context of lifelong learning and the systemic demands that it brings. But again this is not uniform either across sectors, within a country or across countries.

What is needed to give greater vitality to the notion of lifelong learning for all, therefore, are reforms that make learning throughout the lifecycle work better as a system, so that the whole is greater than the sum of the parts. This is true in each of the five areas of focus highlighted in this chapter.

First, **assessment and recognition mechanisms** have in many countries been improved in various encouraging ways, for example, by giving credit for various informal courses, by allowing students to follow certain pathways that were hitherto impossible, and by starting in some cases to provide better information about courses. A whole-system approach would aim to create a connected network of opportunities. Credit would be given, and courses made visible, according to their content and outcomes rather than to where they happened to take place. To move in this direction, countries need to make a principle of removing any unwarranted institutional barriers to learners taking up and getting credit for learning activities.

Second, **foundations for learning** are being strengthened for young people and for adults, in particular in countries that recognise the importance of improving people’s motivation in the first instance to engage in organised learning and thereafter to become self-driven learners. There are numerous examples of measures to increase the relevance of learning at school (particularly to under-achieving groups) and others that make adult learning more enjoyable or more structured around adults’ distinctive needs. Yet countries have not explicitly put motivation and engagement at the centre of their educational foundations, which remain oriented to processing students through recognised educational stages. A systemic rethinking of the foundation would require basic curriculum goals to be fundamentally readjusted, to emphasise the creation of lifelong competency and inclination to learn, as much as current mastery of the curriculum.

Third, old principles of **equity and access** are being applied in new ways. There remain some significant gaps in the quantity of provision. In response, some countries are recognising the importance, for example, of widening access to

*Too often the pieces of the lifelong learning jigsaw remain unconnected...*

*...as policy responses have been neither consistent nor uniform across learning systems.*

*To make lifelong learning work better as a system, countries need:*

*...to make learning opportunities hang together as a coherent network...*

*...to put motivation and engagement in learning at the heart of basic education...*

*...to extend learning to all by making it an inclusive part of the culture, not just*

*by making more places  
available...*

early childhood education. However, access is not just a matter of quantity of places or courses, but of the nature of the opportunities and of the wider context in which they are offered. At work, creating a learning-rich environment can be as important to learning as the number of training courses that are offered. In tertiary education, unless expansion is matched by a greater diversity of learning options, it may serve primarily already-privileged groups. So equity needs to involve an inclusive approach to all aspects of learning in society, not just a political decision to expand provision to fill gaps.

*...to look at optimal ways of  
deploying resources, looking  
across sectors...*

Fourth, while more **resources** have been made available during the 1990s, they still do not match burgeoning demand. This is partly a quantitative issue – more would be needed overall to fill gaps in provision – but also a matter of how to deploy resources wisely and how to muster private as well as public sources. These questions are being asked in individual sectors, but the efficiency of the system as a whole is not being addressed. A systemic approach would go further than most governments have so far dared, and ask whether the allocation of resources across different sectors of provision and over the lifetime is optimal from a social and economic point of view. Both the benefits and the costs of learning need to be evaluated over the lifetime. Existing data are, however, extremely limited for this evaluation, particularly because little is known about expenditure outside the formal education sector.

*...and lastly to ensure that  
working together in  
partnership to these ends  
becomes a priority, not just  
rhetoric*

Finally, **policy co-ordination** is today widely preached and selectively practiced. In policies to improve young people's transitions, for example, a number of countries have strong traditions of working across agencies, including with organisations outside government. But what is harder is establishing such co-operative arrangements where such traditions do not exist. Some attempts at copying arrangements from other countries have not worked well. Each country needs to look at its own context, and consider carefully what is the best way to break down existing cultural divides that hinder collaboration. Having accepted that lifelong learning is too wide an enterprise to be left to any one agency or ministry, OECD societies need to make a priority of working together to make it a reality. ■



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