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GOVERNING BOARD OF THE CERI

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MEETING OF THE EDUCATION COMMITTEE AT MINISTERIAL LEVEL  
ANALYTICAL REPORT: EDUCATION POLICY ANALYSIS

CHAPTER 1: LIFELONG LEARNING FOR ALL: POLICY LESSONS

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(Note by the Secretariat)

1. At its Spring 2000 session, the Education Committee agreed to Secretariat proposals for background documentation for the meeting of the Committee at Ministerial level, to be held 2-4 April 2001. The documentation is to include an analytical report, prepared as a special issue of *Education Policy Analysis (EPA)*. The volume is to be released at the Ministers' meeting.
2. Following the format established for *EPA*, the analytical report is being prepared as a set of distinct chapters:
  - Chapter 1: Lifelong learning for all: Policy lessons (PART1)
  - Chapter 2: Lifelong learning for all: Taking stock (PART2)
  - Chapter 3: Closing the Gap: Securing the benefits from education and training for all (PART3)
  - Chapter 4: Competences for the knowledge economy (PART4)
  - Chapter 5: Tomorrow's Schools: Trends, innovations, policies (PART5)
3. Chapters 4 and 5 are being circulated in the form of abbreviated texts at this stage. These short versions provide the main lines of the argument, identify key evidence and references and advance preliminary conclusions.
4. The Analytical Report comprising these chapters as revised in light of the discussion in the Education Committee and the CERI Governing Board will be submitted for review at the meeting of the Enlarged Bureau.
5. The Education Committee and the CERI Governing Board are invited to **DISCUSS** and **COMMENT** on the attached document.

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## CHAPTER 1: LIFELONG LEARNING FOR ALL: POLICY LESSONS

### 1. INTRODUCTION

1. It is five years since OECD Education Ministers adopted “lifelong learning for all” as a guiding framework for their education policy. Ministers also asked the Organisation to investigate how best to implement lifelong learning strategies and this chapter responds to this mandate. It attempts to answer the following questions: What is meant by strategies for lifelong learning and how they differ from other strategies? What are the key policy directions for implementing them? What policy actions undertaken in different countries can be offered as examples to illustrate lifelong learning strategies?

2. Section 2 defines 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 framework is being interpreted and applied in countries. Section 4 takes up policy lessons for the system as a whole and illustrates them with country examples. They provide benchmarks against which Chapter 2 evaluates the progress countries are making. The final section presents some conclusions.

### 2 THE POLICY SIGNIFICANCE OF LIFELONG LEARNING

3. The concept of lifelong learning, or lifelong education, became current in the 1970s. In its early development the concept was equated with adult learning or recurrent education. In choosing the goal of “lifelong learning for all”, OECD Education Ministers signalled a major departure from the earlier concept by adopting a more comprehensive, “cradle-to-grave” view. This view covers all purposeful learning activity undertaken with the aim of improving knowledge and competences.

4. While the concept has achieved great popularity in the political debate about education, its very comprehensiveness opens it up to multiple interpretations. Questions have been raised as to whether it is largely a slogan, but devoid of meaningful content for guiding policy or whether a lifelong learning framework implies policy actions that differ from those suggested by competing approaches to policy.

#### 2.1 *Distinguishing features of the lifelong learning approach*

5. 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 informal settings of home, the workplace, the community and society at large. The key features of the lifelong learning approach are:

- 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 system covering the whole lifecycle and comprising all forms of formal and informal learning.
- Second, *the centrality of the learner*. The learner, and catering to the *diversity* of learner needs, forms the core of lifelong learning strategies. This signals a shift from educational policies that focus upon the supply, and upon the formal institutional arrangements for learning, to the demand side.
- Third, the approach emphasises *the motivation to learn*, and draws attention to self-paced and self-directed learning.

6. The lifelong approach differs from other approaches to education policy in that there is no competing *systemic* approach. All other approaches to education policy are best described as sector-specific; the systemic view is unique to the lifelong learning approach and is its main value-added. This central feature has a number of policy implications for the content, quality, relevance, structure of provision, resource allocation and policy development.

7. With respect to the *content, quality and relevance* of education, the lifelong learning approach demands that provision of opportunities not only contributes to new learning but also equips and motivates the individual to undertake further learning, especially through self-directed learning. Curricula, pedagogical practices and the organisation of learning all need to be examined from this perspective. Standards of quality and relevance need to be defined with the wider diversity of learning needs in mind. In this regard, the difference between the lifelong approach and other approaches to education policy is more a matter of degree – for the lifelong learning approach, catering to the increasing diversity of learners is a central focus. The approach emphasises the importance of outcomes that are differentiated according to learners' circumstances and needs.

8. In terms of the *structure of provision*, a lifelong learning approach would consider how learning in each setting is connected to other learning from the point of view of an individual's transition and progress through the various stages and types of learning. The linkages and pathways that facilitate an individual's learning progress become a central policy concern.

9. Existing approaches to *resources for education and training* are typically viewed in a sectoral perspective, and resources for the informal sector are paid little attention. In contrast, 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.

10. Finally, implementing the systemic approach of lifelong learning goes beyond the jurisdiction of any single ministry and involves a wide range of stakeholders. The approach requires a high level of co-ordination for developing and implementing policy.

11. One other distinctive feature of lifelong learning relates to the objectives of education policy. This policy has always recognised a wide range of objectives: economic, social, cultural, personal development, citizenship and so on. Yet, policy discussions are often fraught with tensions between an instrumental view of education and one that takes a broader range of objectives into account. The lifelong learning approach, because it takes account of learning over an individual's lifecycle, provides an approach for striking a balance among different learning objectives. Each is recognised as being important, but the relevance may be stronger or weaker during different phases of the lifecycle.

12. The 1990s "cradle-to-grave" vision of lifelong learning is 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 broader notion begins with a simple question: What are the structural and institutional changes that need to be made if a far higher proportion of a nation's citizens are both to have the opportunity to continue, and to have the motivation and the skills to continue, in active learning throughout their lives? The answers to this question touch upon many longstanding concerns of OECD Education Ministers: the desire to bring about wider and more equitable access to learning, and to reduce learning deficiencies among poorly qualified adults for example. As such the concept of lifelong learning contains much that is not new. But the answers also entail a broader and more systemic view of lifelong learning and require action in specific sectors of provision that contributes to lifelong learning. Section 4 below discusses five areas where action is particularly relevant at the system level. These areas are: a system for ensuring visibility and recognition of learning and qualifications regardless of where the learning is acquired; developing in all young people, learning foundations that encompass broader skills such as the capacity to

monitor and manage one's own learning and the motivation to continue in active learning as an adult; assessing policies for equity and access in the lifecycle perspective; ensuring that resources are mobilised to pay for lifelong learning; and improving co-ordination of a range of policies and action among many stakeholders.

### 3. COUNTRY APPROACHES

13. Is support for lifelong learning only at the level of rhetoric or are countries doing something about it? In what sense have they adopted this concept? Table 1.1<sup>1</sup> presents illustrative information on how 16 Member countries are attempting to define and operationalise lifelong learning. The Table is not a comprehensive account of all recent action by countries [*Delegates to the Committee are requested to fill out the picture for their countries if important new developments are not cited*]. As can be seen, not many countries have produced official national statements that set out comprehensive policies for lifelong learning – although Norway is in the midst of a review of lifelong learning policy and a similar review was carried out in Hungary. At the same time, a number of countries have issued green and white papers, commission reports and official statements. Some of these identify lifelong learning as the guiding framework even when the policies deal with a specific sector of provision.

14. Several patterns emerge from a review of Table 1.1. First, lifelong learning is increasingly conceptualised in the broader “cradle-to-grave” view, Denmark being an exception. The approach has achieved a high level of acceptance at the political level. Second, it is also clear that 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. Third, many countries are introducing reforms at the sector level that are framed within the context of the lifelong learning requirements. However, countries differ in the emphasis placed on different sectors or types of provision of lifelong learning. These differences reflect the differences in urgency of perceived needs among countries. For example, some countries have made specific commitments to apply the goals of lifelong learning to the strengthening of teaching and learning at the school level while others are putting the accent on improving post-secondary and adult training opportunities. Finally, 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.

### 4. POLICY LESSONS

15. Despite the popularity of the lifelong learning concept, it is clear from Table 1.1 that countries have not yet begun to apply the concept at the system level. It is also evident, from Figure 1.1, that “lifelong learning for all” is far from being a reality in OECD countries<sup>2</sup>. Another conclusion from this type of information is that some countries perform better than others. This can be observed by comparing Figures 1.1 and 1.2, it is clear that Sweden's performance is above the average for all countries. What can

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1. The text which follows draw upon 11 background papers prepared by participating countries in OECD's activity on financing lifelong learning. This information has been supplemented by other national statements that have become available recently.

2. Figure 1.1 brings together enrolment information in formal education (the solid line) and participation in adult education and training (broken line) 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 part-time participation, defined as participation in any organised learning activity over a twelve-month period.

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?

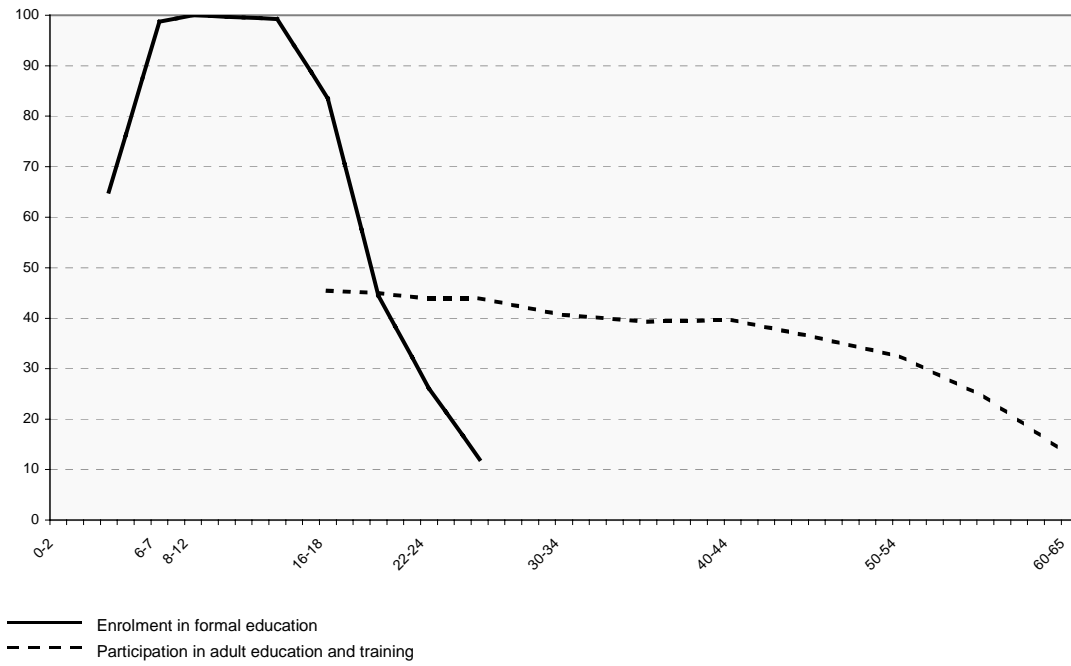
<b>Table 1.1 Country Approaches to Lifelong learning: Strategies, and Definitions in key documents</b>	
<b>AUSTRALIA</b>	
<p><b>Document</b></p> <p>Learning For Life: Review Of Higher Education Financing And Policy (DEETYA, 1998).</p> <p><b>Context</b></p> <p>While there is not yet a formal government 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).</p>	<p><b>Main Elements</b></p> <p>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.</p>
<b>AUSTRIA</b>	
<p><b>Documents</b></p> <p>Country Report (1998); Working and Coalition Agreements of governing parties (1990, 1994, 1996); Advisory Council for Economic and Social Issues, (<i>Beschäftigungspolitik</i>) 1997.</p> <p><b>Context</b></p> <p>Education is a key part of the programme of Austrian governments, for economic and cultural reasons. Social partners participate actively in defining educational policies.</p>	<p><b>Main Elements</b></p> <p>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 of the apprenticeship training; increases in schools' autonomy.</p>
<b>CZECH REPUBLIC</b>	
<p><b>Documents</b></p> <p>Country Report (1998).</p> <p><b>Context</b></p> <p>Lifelong learning is seen as a comprehensive process of vital importance. Immediate concern has concentrated in initial education.</p>	<p><b>Main Elements</b></p> <p>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 the education preparing the student for his/her future profession and aimed at the application of innovations, economic growth, etc., and the education aimed at 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 pre-occupations of public officials and social partners have been with the formal sector for initial education.</p>
<b>DENMARK</b>	
<p><b>Documents</b></p> <p>Country Report (1998);</p> <p><b>Context</b></p> <p>Lifelong learning is viewed as a mandate for ensuring adequate learning opportunities for adults. There is a long and strong tradition of adult learning.</p>	<p><b>Main Elements</b></p> <p>A measure adopted in 1995 mentions the importance of initial education providing a sound foundation for further learning; and stresses 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. It calls for expanded provision of learning opportunities, greater use of appropriate technologies, greater transparency of learning, better information on learning opportunities, financial support for learners, and special support for learners with limited educational background.</p>
<b>FINLAND</b>	

<p><b>Document</b> Country Report (1998); <i>The Joy of Learning: a national strategy for lifelong learning</i>, (Ministry of Education, 1997).</p> <p><b>Context</b> One of the few countries that has published a national statement outlining its vision of lifelong learning.</p>	<p><b>Main Elements</b> Promotion of broadly based and continuous learning, combining "learning careers" with activities in communities where people live and work. Specific objectives include: strengthening learning foundations; providing a broad range of learning opportunities; recognising and rewarding learning regardless of where it takes place; building learning paths; improving teachers' and trainers' skills; and involving all relevant jurisdictions and players. The government's development plan for the period 1995-2000 defines the following goals: offer one year of pre-school education for all children before the comprehensive school; maintain high upper-secondary completion rates and increase the proportion of those continuing in post-compulsory study; revise secondary vocational diplomas, with more emphasis on on-the-job learning and apprenticeships; complete reform of the polytechnic sector, and expand places, so that 60-65% of secondary completers can enter tertiary education; increase adult education leading to qualifications; increase training places by about 50%; expand other forms of continuing education.</p>
<b>FRANCE</b>	
<p><b>Document</b> Framework Law on Education (1989); Five-year Law (1993).</p> <p><b>Context</b> Established education as a top national priority.</p>	<p><b>Main Elements</b> Sets objective of educating 80% of youth population to upper secondary completion within 10 years, also addressing pre-school education. Five-year Law of 1993 adds the right of young to vocational education.</p>
<b>HUNGARY</b>	
<p><b>Documents</b> Country Report (1998).</p> <p><b>Context</b> The priority has been the strengthening of formal education.</p>	<p><b>Main Elements</b> 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 education opportunities for socially disadvantaged persons and ethnic minorities are expanding.</p>
<b>IRELAND</b>	
<p><b>Document</b> <i>Learning for Life: White Paper on Adult Education</i> (Department of Education and Science, 2000).</p> <p><b>Context</b> 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.</p>	<p><b>Main Elements</b> 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; 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.</p>
<b>ITALY</b>	
<p><b>Document</b> Country Report (1998); Labour Agreement, 1996.</p> <p><b>Context</b> Lifelong learning was introduced as a policy objective by the government in 1996, in consultation with the social partners.</p>	<p><b>Main Elements</b> Recognises the central role of human resources in production; envisions lifelong learning as 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.</p>
<b>JAPAN</b>	

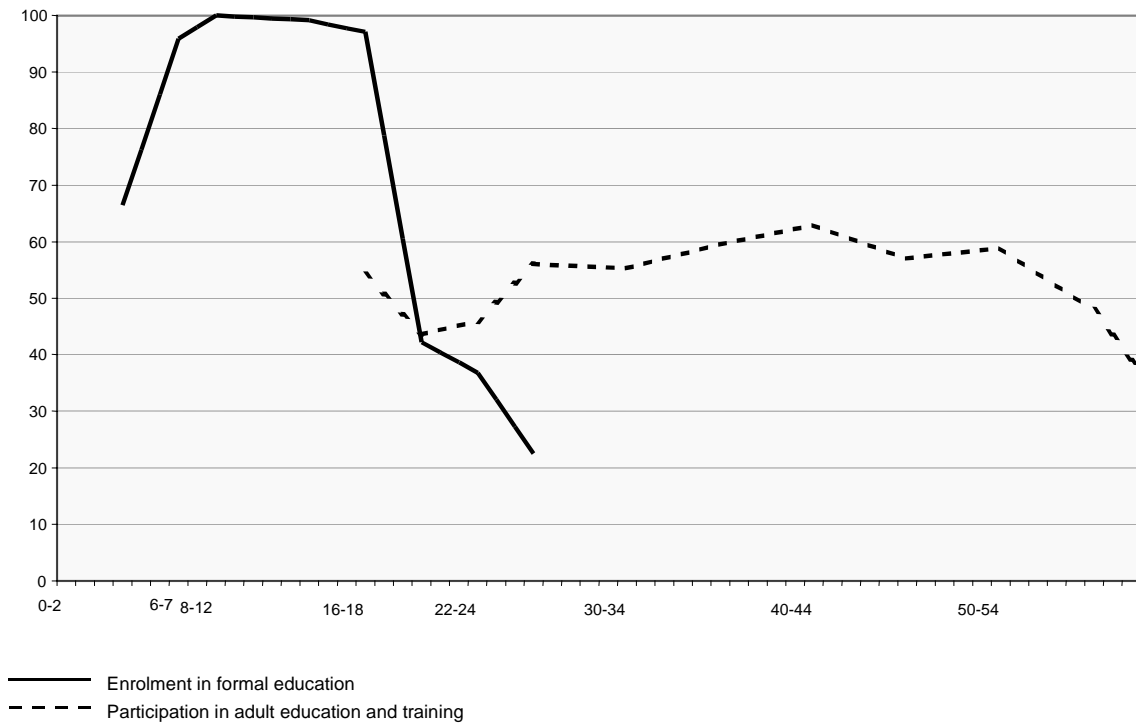
<p><b>Document</b></p> <p><i>The First to Fourth and Final Reports on Educational Reform</i> (National Council on Educational Reform, 1985-1987); <i>Report on Lifelong Learning</i> (Central Council for Education, 1981); Country Report (1998).</p> <p><b>Context</b></p> <p>Japan was one of the first countries to express a comprehensive view of lifelong learning.</p>	<p><b>Main Elements</b></p> <p>“Lifelong integrated learning” was introduced in the 1960s, in co-operation with the Ministry of Education, as a means for reforming Japan’s school-centred education system, and improving re-training opportunities for adult workers. Offers a concept of lifelong integrated education in which the entire education system would promote the lifelong learning of 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. Places the learner at the centre. It is also seen as a tool for regional development.</p>
<b>KOREA</b>	
<p><b>Document</b></p> <p>Country Report; <i>Education Reform for New Education System</i> (Presidential Commission on Educational Reform, 1996).</p> <p><b>Context</b></p> <p>Recognised the need for a national framework of policies and infrastructure.</p>	<p><b>Main Elements</b></p> <p>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.</p>
<b>NETHERLANDS</b>	
<p><b>Document</b></p> <p><i>Lifelong Learning: the Dutch Initiative</i> (Ministry of Education, Culture and Science, 1997); Country Report (1998).</p> <p><b>Context</b></p> <p>Elements of lifelong learning have been long established in the Netherlands. An action programme to implement specific lifelong learning policies was presented in 1998.</p>	<p><b>Main Elements</b></p> <p>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 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 lifelong learning Action programme presented in 1998 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.</p>
<b>NORWAY</b>	
<p><b>Document</b></p> <p>Country Report <i>The Competence Reform in Norway, Plan of Action 2000-2003</i> (Ministry of Education, Research and Church Affairs, 2000).</p> <p><b>Context</b></p> <p>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.</p>	<p><b>Main Elements</b></p> <p>The reform is being implemented according to guidelines provided by a well-established broad view of lifelong learning. The concept has expanded to embrace the complete life-span including basic education for children and young people. The reform seeks to help meet the need for competence in society, in the workplace and by the individual. Priorities include 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.</p>

<b>SWEDEN</b>	
<p><b>Document</b></p> <p>Country Report (1998); <i>Lifelong Learning and Lifewide Learning</i> (The National Board of Education, 2000).</p> <p><b>Context</b></p> <p>The National Agency for Education has a special action programme for lifelong learning. The action programme is intended to create an overview and picture of the anatomy of lifelong learning in Sweden and to identify and analyse key issues in a strategy for lifelong learning.</p>	<p><b>Main Elements</b></p> <p>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.</p>
<b>UNITED KINGDOM</b>	
<p><b>Document</b></p> <p><i>The Learning Age: a Renaissance for New Britain</i> (Department for Education and Employment, 1998).</p> <p><b>Context</b></p> <p>Green Paper setting out the broad strategy of the new Labour government, seeking consultation on a range of issues.</p>	<p><b>Main Elements</b></p> <p>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. Development of spiritual side of individuals and of citizenship considered important alongside economic objectives; the green paper stresses preparing citizens for active participation in all spheres. Government role seen as enabling citizens to take responsibility for themselves. Proposals include expanding further and higher education, creating "University for Industry", setting up individual learning accounts and promoting post-16 education, adult literacy, higher skill levels, and better teaching and learning standards.</p>
<b>UNITED STATES</b>	
<p><b>Document</b></p> <p>President Clinton's Ten-point plan for education (Delci, 1997).</p> <p><b>Context</b></p> <p>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).</p>	<p><b>Main Elements</b></p> <p>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.</p>

Figure 1.1 Participation in education and training over the life-span



**Figure 1.2 Sweden Participation in education and training over the life-span**



#### 4.1 *Five areas of focus*

16. The main distinguishing feature of the lifelong learning concept is its systemic view of learning. A review of the work done under the current mandate suggests five areas or features of the lifelong learning system that deserve close attention. First, all learning, not just formal classroom learning, needs to be recognised, made more visible and linked to rewards in order to provide incentives for individuals to progress along learning pathways. Second, a broader conception of foundation skills is required for lifelong learning than is the case with the traditional approach, one that gives special attention to motivation to learn and the capacity for self-directed learning. Third, access and equity issues need to be evaluated over the lifecycle and across all types and settings of learning. Fourth, as in the case of access and equity, the resources available for lifelong learning need to be assessed across sectors and settings of formal and informal learning. Individual sector priorities need to be assessed in this light. Finally, education ministries cannot alone implement lifelong strategies; close co-operation among a wide range of parties is essential.

17. A first consideration in assessing progress in implementing lifelong learning strategies, therefore, is to ask whether the systemic features are being put in place. It is important to note, however, that the systemic features have implications for policies within specific sectors or settings of provision. These five areas are discussed below, and in each case the system-wide issue is discussed in terms of desirable policy action in specific sectors of provision. The policy lessons are illustrated with specific examples taken from country experience, but no attempt is made to be comprehensive in citing country experiences. [*Delegates are requested to suggest inclusion of other country examples they think would be more appropriate*]. In citing these initiatives it is not presumed that they are the best examples to follow or that they proven to be uniformly successful. Many of these initiatives have recently been put in place and, in general, thorough evaluations have not been carried out.

#### 4.2 *Visibility and recognition of learning*

18. Enhancing the visibility and recognition of all forms of learning, whatever its location, is a key challenge in implementing lifelong learning strategies. Giving increased visibility and recognition to learning across the different education sectors, and to learning that occurs in family, community and workplace settings, is an essential prerequisite for the creation of a range of connected pathways. Through ensuring that formal learning at any one age or in any one type of institution does not become an educational dead-end, connected pathways can improve adults' incentive to participate in learning by taking account of their previous experiences, and improve the cost-efficiency of learning by avoiding wasteful duplication. Countries need to address three specific problems: putting in place assessment and recognition mechanisms for learning that occurs in non-formal settings; creating pathways between learning sectors; and creating the signposts that allow all learners to obtain the information and guidance needed to take full advantage of wider learning opportunities.

##### 4.2.1 *Enhancing visibility and recognition*

19. Increasing the visibility of learning that occurs outside of formal education is complex and difficult. It requires standards and learning outcomes to be developed against which this learning can be assessed. It requires agreed assessment techniques to be developed. It requires agreement on recognition

methods: are full qualifications to be provided, or only partial credit? How can credit be easily transferred between different levels and sectors of education? Addressing these issues requires the active commitment and engagement of a number of stakeholders, within and between different education sectors. It requires close co-operation 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.

20. During the 1990s many OECD countries struggled to give greater visibility to non-formal learning: to assess and recognise it to give credit towards educational qualifications; and to provide forms of recognition that can enhance careers. Models exist that countries can learn from, and Box 1.1 describes the experience of France and Norway.

### Box 1.1

#### Recognising non-formal learning

In France, 1985 legislation took steps to introduce a full-scale system for the identification and assessment of non-formal and experiential learning. It gave employees a right to an assessment (the *bilan de compétence*) of their professional and personal competences as well as their motivation and aptitudes in order to facilitate both their professional and educational plans and careers. A national network of over 700 public and private organisations has been created that annually provide 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 French legislation provided for the validation of skills acquired through work experience in a way that is directly linked to the national qualifications.

As far back as the 1950s, Norway has had a legal basis for adult candidates to take final apprenticeship examinations on the basis of 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 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 per cent of all trade certificates awarded in Norway were awarded to Section 20 candidates. More recently Norway has explored wider mechanisms for recognising non-formal learning. In 1997 it began establishing a national system to document and recognise, in the workplace and in education, adults' non-formal learning. Pilot projects have begun to relate non-formal learning both to upper secondary education and to higher education using a mix of written or 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 non-formal learning, and also giving them credit in their studies for non-formal learning. A range of projects has been initiated to investigate how non-formal 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.

21. However in many countries giving greater visibility to non-formal learning has proven to be difficult (Bjørnåvold, 2000). Countries that have strong apprenticeship systems, such as Germany and Austria, have been reluctant to embrace the concept, perhaps in part due to the success of their apprenticeship systems. In the Southern European countries the notion has been greeted positively, but legal and political moves to introduce the concept have often not been matched by substantial progress on the ground. In the United Kingdom acceptance of the notion has been enthusiastic. 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).

#### 4.2.2 Creating pathways

22. 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: bringing upper secondary general and vocational education closer together; creating links from upper secondary vocational education to tertiary study; and building bridges between non-university- and university-level tertiary education (OECD, 1998b; OECD, 2000).

23. Hungary, Norway and Sweden took steps during the 1990s to increase the general education content of upper secondary vocational pathways: in order to broaden the general and conceptual knowledge and skill required in working life; and to improve links between upper secondary vocational programmes and tertiary study. Norwegian evidence shows that these initiatives have made vocational pathways more attractive. Swedish evidence shows that pathways between upper secondary vocational programmes and university-level study will result in students in nearly all vocational areas moving to further study. However in both cases the benefits do not come without some difficulties. Weaker students struggle to cope with the higher demands of the general education subjects; teachers often find it difficult to clearly relate the increased general education content to the world of work; and the route to further study for vocational education students is normally based only upon performance in general education subjects, with an implicit under-valuing of vocational studies.

24. One mechanism that Austria has adopted to create pathways from upper secondary vocational education to tertiary education has been the creation of “double qualifying” programmes that lead to both a job qualification and tertiary entry. These programmes are very demanding, and involve extending the duration of overall upper secondary study. Both in the case of Austria’s double qualifying pathways and in the case of Switzerland’s *maturité professionnelle*, which has a similar outcome, these initiatives 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.

25. OECD countries have used a number of ways to improve the pathways from secondary to tertiary education. In some countries, tertiary-level studies are offered 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.

26. 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 problems and barriers that are 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 observed in North America, and Australia’s 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 pre-requisites, and provide programmes at several levels to allow articulated progression within the one institution.

#### *4.2.3 Information and guidance*

27. In order to make flexible pathways possible it becomes increasingly important for sophisticated and effective education and employment information and guidance systems to be put in place to provide appropriate “signposts” for lifelong learners. 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.

28. 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 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 of high quality and affordable.

29. 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 being 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. Learndirect currently attracts around 1.7 million calls a year.

### **4.3 Foundations for lifelong learning**

30. The foundations for learning must be seen more broadly within a lifelong learning framework than simply universal access to primary education. A broader conception is needed, encompassing improved access to early childhood education, improving young people’s motivation to learn and capacity to learn independently, and addressing learning deficiencies in adults. Issues of access to early childhood education are discussed below in Section 4.4.1. Here approaches to raising the motivation to learn among young people and adults are discussed.

#### *4.3.1 Strengthening the motivation to learn for the young*

31. The 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 of the school and by the introduction of anti-bullying strategies to enhance student enjoyment of school and self-esteem.

32. 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 upper 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 the enterprise (OECD and Statistics Canada, 2000). Across OECD countries as a whole, some one in four 20-24 year-olds have not completed upper secondary education. However, there is wide variation across countries: from one in ten or less in

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3 . Three quarters or more of all calls to learn direct are from those aged 25 or over.

countries such as Korea, the Czech Republic and Norway to a third or more in Italy, Spain, Turkey and Portugal.

33. An essential element of policies to encourage upper secondary school completion must be strategies to prevent early school leaving, and strategies to pick up and quickly re-insert early school leavers, 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. Such strategies 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.

34. 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 of the school, to assume control over their own learning, and to build links between theory and practice. In the United States substantial emphasis has been put upon community-based service 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 vocational education to develop the skills and knowledge that can build 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 the case of 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, to motivate students, as well as to increase young people's 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 been strong -- such as Australia, Canada, Sweden and the United States -- notable effort has been devoted during the 1990s to the creation of school-managed workplace experience programmes. Whilst the evidence on the impact of these programmes on later employment remains unclear, there seems no doubt that they are highly popular with and motivating for young people.

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

- 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 as well as 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 quality 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.

#### 4.3.2 *Motivating adult learners*

35. Recent research has highlighted some of the techniques that are successful in motivating adult learners (OECD and U.S. Department of Education, 1999, OECD/CERI, 1999b). These include: drawing upon experience, locating learning within the student's context, making learning applied, and allowing learners greater choice of and control over what they learn. Preliminary results from the ongoing Thematic Review of Adult Learning suggest some additional policy lessons:

- A major barrier to adult participation in learning identified by recent research is the use of inappropriate teaching methods. Adults do not learn like children and they need teaching methods that are more suited to their learning requirements. This implies the need for specific training for trainers of adults, and specific training methods for adults (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 Centres, or Australia's TAFE colleges, can be an important initiative in raising adult participation (see Box 1.2).
- Another key requirement is the availability of flexible options for adults to progress at an individually determined pace and 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.
- One of the major concerns of adult learning is to target adults who are difficult 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.

**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 found in Canada and the United States. The public system also includes some community-based providers, training providers in private organisations, 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 average 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 some one in ten 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 more than doubled, growing by 105% and the number aged 30 and over increased by 199%. In 1999 students aged 25 and over accounted for nearly two thirds of all students, and those aged 30 and over for almost half.

36. A culture of learning is important for promoting adult learning. A culture of learning 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.

#### **4.4 Access and equity**

37. Access and equity are enduring concerns in both the OECD’s work on education and in policy development in Member countries. Chapter 3 of the Analytical Report discusses equity issues in much greater detail and also addresses the risks of the “digital divide”. The focus here is the particular light that the lifelong learning framework throws on the access and equity issues. Viewed in this framework, gaps in access are particularly evident in the areas of early childhood education and adult learning. The framework also emphasises that access and equity issues can be most usefully approached through the increased diversity of 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 be a major factor in raising access to tertiary education and adult learning.

#### 4.4.1 Gaps in access

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

38. In about half the OECD countries with relevant data, only a minority of children participates in pre-school programmes before age 4. Although OECD countries have been prompted in recent years to expand services for young children because of women's participation in the labour market, the lifelong learning approach to investment in early childhood services is that 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. From birth children are learning and possess a unique ability both to develop and compensate for problems in the first few years of life. Research on the effects of programmes for young children suggests also that young children who participate in a quality early childhood education and care environment are likely to develop higher order reasoning and problem-solving skills. 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. Awareness has grown that early childhood education and care<sup>5</sup> has the potential to maximise children's motivation and to prepare them for a lifetime of learning (OECD, 1999a).

39. 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 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 far more 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. Whilst in practice these two approaches seem to have much in common, 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 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 as are the basics of literacy and numeracy? What degree of emphasis should be placed upon each of these approaches?

40. 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 and New Zealand nearly all children of this age participate: in Germany, the Czech Republic and the United Kingdom some 50 per cent participate; yet in Canada, Ireland, the Netherlands and Switzerland the participation rate is around five per cent or less (OECD, 1999a). 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.

41. Although access may be very high, and close to universal, for children from three-to-six, there are certain populations with limited access to early childhood education and care: children from low-

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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.

income families, children living in rural areas, children under three, 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, it is clear that public investment by national and local government is a key factor in ensuring fair access to low- and middle-income families. Without a pro-active stance from the government, there is a risk of a two-tiered system developing, with well-funded infrastructures for the middle and upper income groups co-existing with poor quality facilities and materials for children from low-income groups. Country evidence suggests that a coherent system of early childhood education and care requires secure funding for services, including substantial direct public funding, to help address supply gaps in low-income and rural areas.

### *Encouraging adult learning*

42. As can be observed from Figure 1.1, 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 achievement. 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.

43. Policies that can help motivate participation by adult learners were taken up in Section 4.3.2. The specific issue of workplace learning is addressed here. The focus of policies to encourage learning in the workplace must be on the ways in which the organisation and structure of work and of enterprises encourages competence-building and learning, not just on formal employee training. 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 organisational life. Learning-rich workplaces can be triggered in a number of ways: decentralised and flatter management structures; encouraging employees to reflect upon their experiences; the use of team-based production; and through exposing workers to new problems in the production process (OECD/CERI, 2000b). 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 serves to emphasise the importance of seeing lifelong learning as an integrated, and integrating, policy framework, and not just as a matter for education portfolios.

#### *4.4.2 Diversity and access*

44. 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 growth alone does not appear to reduce differences in participation rates between socio-economic groups (Chapter 3, *Analytical Report*; OECD/CERI 1999). The segmentation across learning options, pathways and combinations are a major hurdle in meeting the diversity of learner needs and serve as a disincentive to participate. At tertiary-level studies, standards and evaluation processes now appear inadequate to take in the very wide range of programme objectives, methods and learning of individual students (OECD 1998b).

45. Section 4.3.1 has highlighted several approaches to strengthen the motivation to learn for the young by developing a range of pathways. A growing diversity among upper secondary pathways has

helped to cater to the increased demand for a wider range of pathways (OECD 2000). Countries are now offering a greater variety with increased links between general and vocational education, wider opportunities for graduates of vocational programmes to enter tertiary study, and a growing trend for schooling to be combined with work, either through apprenticeships, school-organised workplace experience, or students' part-time and vacation jobs. The attractiveness of these pathways is increased when they provide tight links to work and to tertiary study, as in the case of apprenticeship pathways in Austria and Switzerland, and as in the case of the tight links developed between upper secondary general education and employment in Japan. Experience in countries such as Austria, Norway, Switzerland and Hungary, which have attempted to create programmes that have such multiple links, demonstrates their attractiveness to young people. Experience in Denmark shows that where education systems have not been able to provide such opportunities for young people to obtain combined qualifications for work and tertiary study, young people have proven themselves adept at manipulating the system, at increased cost to the public purse, to create them themselves.

46. The transition review 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 per cent 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, although not specifically designed for the weaker upper secondary students, are entered by many young people who leave upper secondary school early, without a qualification, and offer a more adult-centred learning environment that many young people find attractive.

47. 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 has 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. In Finland the 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

48. Another element of increased diversity of options is through enlarged study options. The IUTs (vocationally-oriented university institutes) in France 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.

49. The growth of private tertiary education provision offers another means of introducing greater diversity. Japan, Korea and the United States have large and diverse private sectors; so, too, Mexico and Portugal where 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).

50. Note should also be taken of expanded distance education options. Free-standing Open Universities in the United Kingdom, the Netherlands, Germany and Japan all serve clientele not easily reached by residential study options, among which adults with work or family responsibilities. Traditional universities 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 states in the U.S. established a virtual university, the Western Governors' University, to make available to learners in the region -- and outside -- the full range study options and course modules across all of their state systems.

51. 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-Europe 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. In the same direction, 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 articulation arrangements in the United States and New Zealand, and joint degree programmes in Japan and in the Netherlands.

#### **4.5 Resources for lifelong learning**

52. Public authorities wishing to implement lifelong learning strategies need to consider three sets of questions. Are the resources adequate to support lifelong learning and are they optimally allocated for different types and settings of provision and over different phases of lifecycle? Are the resources being efficiently used or are there efficiency gains to be reaped? If more resources are needed, who would pay for them and how can the resources be mobilised?

##### *4.5.1 Adequacy of resources*

53. Whether or not resources are adequate depends upon the targets countries choose for lifelong learning provision. The discussion of access and equity points out that there are gaps in participation in lifelong learning. Education spending has increased during the 1990s, yet the promise of "lifelong learning for all" implies an expansion of learning opportunities. Although many Member countries have set participation targets for individual sectors of provision, none has identified targets for the whole system of lifelong learning. Even if targets in each sector were identified, it will be difficult to estimate the costs

involved in meeting them (OECD 1999e). There are different types of costs involved – direct; indirect, opportunity costs and so on – and good estimates of these are not available. As regards the formal sector, estimates of costs need to consider potential economies of scale or possible programmatic changes within existing institutional arrangements and if these arrangements might change. Assessing costs related to informal learning is even more complex, since the settings in which learning occurs are less clearly defined and learning is likely to be mixed with production and other activities.

54. 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 to difficult to reach poorly qualified adults. For some new patterns of lifelong learning, for example, part-time adult learning, the marginal costs may be lower than 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 young as well as the adults into account, will require expansion in capacity, that is existing capacity cannot accommodate increased demand in most countries (OECD 1999e)<sup>6</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.

#### 4.5.2 *Making more efficient use of resources*

55. Greater efficiency in the use of existing resources offers one approach to meet 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 in the areas of teaching and personnel costs, rationalisation of the structure of provision, better use of ICT and more extensive use of the private sector.

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6. To assess the broad orders of magnitude involved, recent OECD work has attempted to develop estimates of the expansion in capacity or the number to be served if participation rates were to be increased to meet certain defined policy targets. Three scenarios are assessed for children and young adults, taking the demographic developments into account. The first scenario involves no improvement in the 1995 participation rates; the second, a modest increase, so that low performing countries approximate the OECD median by 2005, and a more ambitious scenario where low performers approach “good practice” participation rates defined as the fourth best country rate (OECD 1999e). This analysis suggests that at the pre-school level, stable or slightly declining birth rates in many countries would permit many countries to approximate the “best practice” scenario with no or only limited (less than 20 per cent) expansion of current capacity. For the 15-19 year olds, one-third of the countries examined could achieve “good practice” rates with little expansion in capacity and most of the rest could achieve such levels through a 20 per cent expansion. For the 20-24 year olds, raising the participation rates to the “good practice” will involve substantial expansion of capacity in many countries. For adults, even this limited exercise is more complicated because of the difficulties of standardising the learning activity or the learning outcome. The analysis used two definitions of the “at-risk” group whose participation countries may wish to expand. One definition is in terms of the number of adults who have not attained upper secondary level; the other is defined in terms of adults who fall below level three of literacy skills as estimated in the IALS survey. Two scenarios, the OECD median and fourth best country experience (good practice) are used as a basis for estimating the number of adults that need to be served. This analysis shows that in most of the low performing countries the number of adults that would need to be served is large even under modest policy targets. If the participation rates of the “at-risk” group were to be raised to the level of the more advantaged adults training volume would need to be doubled, if account is taken of different kinds and hours of training that the two groups participate in.

*Reducing teaching and personnel cost*

56. The salaries of teachers and other personnel are the largest cost in the formal education system – on average they make up 82 per cent of the all current expenditure at the elementary and secondary levels and somewhat lower at the tertiary level. These are increasing as the age profile of the teaching population rises. Most countries, when they are looking to increase the cost-effectiveness of their education systems, look to teaching costs. 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.

57. OECD countries are pursuing a number of strategies to achieve savings in teaching and personnel costs (OECD 1999e). Hungary is increasing the student-teacher ratio in all sectors. Italy is restructuring the school system to reduce the number of teachers employed and increase student/teacher ratios. The Netherlands reports sharp increases in student/staff ratios in apprenticeship training over the past few years. In Sweden large savings within the municipalities during the 1990s involved economies in the school sector with increased pupil/teacher ratio except in upper secondary and special schools. The Czech Republic is increasing the workload for teachers. In Austria, there has been a reduction in in-service training undertaken in school time; and staff in higher education can now be employed on flexible contracts. In the Netherlands, attempts have been made to cut expenditure on “reduced pay”, the cost of sick leave and disability for staff in all sectors of education. In Hungary, Japan and Norway, introducing distance learning measures and increasing the use of ICT are also seen as ways of decreasing teacher costs. Japan considers the increased use of teaching assistants at universities, rather than fully qualified teaching staff, as an important way of reducing teaching costs.

58. However there is a tension between measures that have a detrimental effect on teachers’ conditions of service and the need to maintain a high quality teaching service. There is a need to promote new professionalism among teachers for more effective contribution to the lifelong learning system. Many countries are already finding it more difficult to attract and retain younger teachers. There is a balance to be struck between reducing teaching costs and enhancing the quality of lifelong learning.

*Rationalisation of provision*

59. 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 Forthcoming). 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. This is to promote more efficient use of accommodation and equipment, and to reduce capital expenditure. 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. Rationalisation includes consolidating resources within sectors. In Australia and Belgium (Flemish Community), a drive for effectiveness and quality motivated consolidation in tertiary education in the first half of the 1990s. In Austria, schools are reducing the number of lessons in some curriculum areas and limiting expenditure on textbooks.

60. 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 short course provision; 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 dropout 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 generalised the *numerus clausus* for enrolment and 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.

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

61. 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 the education and training for some time and recognises that 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 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*

62. ICT is seen by many OECD countries as one of the most effective ways of increasing and widening participation in lifelong learning while keeping down costs to an affordable level. Sweden's Forestry Project Initiative (Boxes 1.3 and 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 1.3****Use of new technologies*****University for Industry (Ufi) in the United Kingdom***

Ufi is a new initiative to provide a national on-line and distributed learning network. It will be operational by Autumn 2000 and will use the customer facing brand of **learnirect**. 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 information and communications technologies.

Using modern digital technologies, the Ufi will broker high quality learning products/services and make them available at home, in the workplace and in a network of **learnirect** centers countrywide. It will aim 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.

In **Sweden**, in a number of municipalities, work is in progress on using distance mediating technologies to provide inhabitants, not only in their own municipalities, but also in others, with more flexible forms of education in time and place, as a complement to the traditional supply of municipally provided courses. Universities and university colleges are co-operating in different consortia over the development of higher education courses to be provided through ICT.

In connection with this a large number of **municipal study centres** have been built around the country. At these centres, participants in both adult education and higher education, have full access to modern technology and in some cases supervised instruction is also available. To contribute to this development of research in distance learning in higher education and popular adult education, on 1st July 1999 a special agency was set up for distance learning **DISTUM**, located in central Sweden. DISTUM will promote the development of and research into distance learning in popular adult education and higher 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 retaining the skills their employees already have.

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.

The type of partnership approach between government, employers and individual learners, which is seen as the way forward for lifelong learning in many countries, is evident in 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.

**4.5.3 Mobilising new resources**

63. If investment in lifelong learning requires additional resources, how will these be financed? Policy decisions to constrain growth in public expenditure, combined with the presence of substantial private returns to most forms of lifelong learning suggests the need for a mixed finance strategy that draws more heavily on private sources. Over the 1990s a clear trend in favour of greater private contribution 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.

64. At tertiary level, a key development is to move toward a comprehensive financing strategy that includes funding from public and private channels and uses funding mechanisms to promote efficiency improvements as well as participation of adults. There are 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 and a proposal for a further subsidy after a break in study in New Zealand. Policies to encourage improved efficiency seek to shift funding to an outcomes

basis. The Danish “taximeter” approach is among the more innovative. Funding for students under this scheme is time-limited (available only when the student is activity engaged in study) and funding for institutions becomes available when students pass their examinations. This approach allows for flexibility: a student may draw on funding support in consecutive years or choose to delay or stop-out without losing eligibility. There is an implicit recognition of varied timing and pathways responsive to the needs and interests of learners.

65. New policies in the United Kingdom, France and the United States introduce new types of tertiary-level education eligible for funding and situate that funding in a lifelong learning perspective. In the United Kingdom, Individual Retirement Accounts (IRA) are topped up with subsidies from the public budget, and it is expected that most IRA-supported learners will choose among learning options through the services provided by the University for Industry (UFI), which is a brokering and information body. In France, a contestable pool of funds has been established to encourage universities to provide new types of programmes for adults. In the U.S., greatly expanded tax breaks for education now allow learners to deduct from their taxes part of the costs of tertiary education studies. Learners enrolling for as little as one course module, in a wide variety of tertiary education institutions, may claim the credit.

66. 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 (*e.g.* the current financial strains in some municipalities in Japan). 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 initiative is Denmark’s where most of the direct costs of adult education and training are borne by the state, 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).

#### **4.6 Policy co-ordination**

67. In 1996 OECD Education Ministers clearly recognised that the provision of lifelong learning involves portfolios other than education. In addition, lifelong learning involves several groups of other stakeholders – learners and their families, institutional and other providers, and social partners. Co-ordination in policy development and implementation presents many challenges but is also essential for the success of policies. The thematic reviews conducted during the current mandate have highlighted both the challenges of co-ordination and examples of initiatives countries have taken in addressing them. This section uses examples from the thematic review of transition to illustrate some of the challenges of co-ordination and lessons for policy.

68. The transition review highlights differences in the ways in which policy development and programme implementation are conducted nationally in OECD countries. There is a wide range of experience on how countries are attempting to have different portfolios work together; on the differing strengths across countries of the involvement of employers, trade unions and others in policy development nationally and in programme delivery locally; and of the varying degrees to which communities are involved in local policy development and programme implementation. These experiences allow some judgements to be made about the relationship between policy development and programme implementation

processes and some key labour market and educational outcome indicators such as employment rates and qualification attainments.

69. Some messages seem clear. First, in those countries in which different government portfolios harmonise their policies, and their claims upon public resources, some of the more difficult transition problems that young people experience seem to be able to be addressed more readily. For example in Denmark, Norway and Sweden there is broad agreement that young people under the age of 20 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 has allowed competition between education and labour for funds to serve young people at risk in the labour market to be avoided, and it has prevented 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 are associated with low, and declining, rates of long-term unemployment for those under the age of 20 in these countries.

70. Second, countries in which many of the key transition arrangements -- work-related curriculum, certification arrangements, wage rates, employer roles and responsibilities -- are set out in nationally negotiated agreements, often at the level of the industry sector, between governments, employers, and most typically trade unions, tend to experience better transition outcomes than do those countries in which such matters are more typically left to local and individual discretion. Positive transition outcomes are more common, and negative outcomes less frequent in countries with strong apprenticeship traditions such as Germany and Switzerland: in these countries strong employer and (generally) trade union involvement is a precondition for the successful operation of apprenticeship. Both in these two countries, as well as in Denmark, Austria and Norway, where apprenticeship plays a smaller role in overall transition arrangements, but where nevertheless transition outcomes are generally good for young people, strong involvement by the social partners in setting the frameworks for youth transition outside of apprenticeship -- in vocational schools, in career guidance and in labour market programmes -- can be seen.

71. 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 and commercial colleges that form the backbone of Denmark's vocational education system for youth.

72. Fourth, and closely related, 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 designing local work experience and community service projects. In Austria, for example, 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.

73. 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: the lack of well organised national employer bodies with a strong network of regional branches for example. Nevertheless some countries have shown that institutions can be subject to major reforms, and effective new institutions can be created. For example Japan in the 1960s introduced national legislation giving schools responsibility for graduate job placement in co-operation with local employers (the *Jisseki-Kankei* system), and took this role away from the national public employment service. This has been one of the key explanations for the effectiveness of its transition outcomes for youth. And in the 1990s Hungary, in introducing a modern apprenticeship framework to replace the system linked to former state-owned enterprises, passed legislation to require compulsory membership of employers' chambers, and gave these powers over apprenticeship quality control that closely matched those apparent in German speaking countries.

74. In other cases countries have shown that they can borrow and adapt key features of other countries' transition arrangements. Australia, for example, has put in place a large national programme -- the Jobs Pathway Programme -- to better connect employers and schools and to give schools a stronger role in job placement of their graduates, that has much in common, without the legislative base, of Japan's *Jisseki-Kankei* system. 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. 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. 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. Canada's experience has shown that without such clear government support, workplace learning partnerships for youth in transition are far more fragile.

## 5. CONCLUSIONS

75. In the mid 1990s 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 pursuit of lifelong learning strategies at the *system* level, for example through setting system-wide policy targets. Where progress has been made is to cast reforms in various sectors of provision in the context of lifelong learning. But again this is not uniform either across sectors within a country or across countries.

76. The broader notion of lifelong learning begins with a simple question: What are the structural and institutional changes that need to be made if a far higher proportion of a nation's citizens are both to have the opportunity to continue, and to have the motivation and the skills to continue, in active learning throughout their lives? The answers to this question touch many longstanding concerns of OECD Education Ministers: the desire to bring about wider and more equitable access to learning, and to reduce learning deficiencies among poorly qualified adults for example. As such the concept of lifelong learning contains much that is not new. But the answers also entail a broader and more systemic view of lifelong learning.

77. The single most important contribution of the concept of lifelong learning is its focus upon systemic aspects of learning, its insistence upon an integrated approach. The centrality of the learner and learning needs, the increasing diversity and importance of different settings of learning, are ideas that have been around for some time. The lifelong learning concept ties them together in a systemic framework. Thus the priorities that are suggested go beyond reforms within individual sectors. What is needed to give greater vitality to the notion of lifelong learning 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 calls for action in a number of areas.

78. To make the vision of lifelong learning for all a reality, a first policy priority is to improve and to create linkages and flows between different areas of learning. Giving increased visibility and recognition to learning across the different education sectors, and to learning that occurs in family, community and workplace settings, is an essential prerequisite for the creation of a range of connected pathways. Through ensuring that formal learning at any one age or in any one type of institution does not become an educational dead-end, connected pathways can improve incentives to participate in learning by taking account of previous experiences, and improve the cost-efficiency of learning by avoiding wasteful duplication. The lifelong learning framework suggests that three specific problems need to be addressed. First, assessment and recognition mechanisms for learning that occurs in non-formal settings need to be put in place. A closely related priority is to develop tools that can make settings other than the classroom more learning-intensive, and to improved understanding of the ways in which non-classroom settings and more learner-centred pedagogy can increase the motivation to learn. Second, pathways need to be developed or improved between learning sectors or types. Action is needed to improved credit transfer and articulation between levels of tertiary education, formal and informal learning, the classroom and the workplace. In some cases new pathways need to be created between previously disconnected areas, for example in some countries, between upper secondary vocational and tertiary education. Finally, improved information and guidance services are needed to take full advantage of wider learning opportunities.

79. Second, the meaning of foundation learning changes when seen from the lifelong learning perspective. It must be seen more broadly than simply universal access to compulsory education, and more broadly than mastery of basic literacy and numeracy. A broader approach needs also to pay attention to improving young people's motivation to learn and their capacity manage and monitor their own learning, and to address learning deficiencies among adults.

80. Third, examining access and equity over the lifecycle has several important implications. Gaps in access are very evident in early childhood education. Inequities in levels of qualification and achievement in compulsory schooling and in upper secondary education have very significant consequences for adults' access to learning opportunities later in life, both with the enterprise and in the formal education system. These need to be addressed on a priority basis. The systemic view of lifelong learning highlights the importance of diversity of learner needs. Catering to this diversity becomes an important policy concern for improving access and equity. Increased diversity of learning methods and options can help raise upper secondary completion rates and combat early school leaving. It can be a major factor in raising access to tertiary education and adult learning.

81. Fourth, the lifelong learning perspective raises the question of 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. Education spending has increased during the 1990s, yet the promise of "lifelong learning for all" implies an expansion of learning opportunities. The costs of this expansion depend on the increases in the volume and the efficiencies that can be achieved in the cost of provision. Countries are applying a variety of measures to improve efficiency. These will be insufficient to provide

the resources should countries choose to plug major gaps in provision. Given the political climate to constrain growth in public expenditure, combined with the presence of substantial private returns to most types of lifelong learning, a mixed strategy that draws more from the private sources is indicated. A trend in favour of greater private contribution is observed over the last few years. Countries are experimenting with a variety of financing mechanisms and close attention should be paid to evaluating their impact on incentives to invest.

82. Finally, at their meeting in 1996, OECD Education Ministers clearly recognised that the provision of lifelong learning involves portfolios other than education. Attention needs to be given to policy development strategies that better integrate all of the stakeholders: better co-ordination between different portfolios and levels of government; clearer and better partnerships to share responsibility for lifelong learning with employers, trade unions and communities. The thematic reviews that have been conducted during the current mandate have helped to identify areas where policy co-ordination is particularly needed and has proven fruitful. These examples are, however, country specific. While some examples may not be suitable for adoption by other countries there are examples well where such is the case. These latter examples need to be examined more closely for wider application among countries.

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