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TERMS, CONCEPTS AND MODELS FOR ANALYSING THE VALUE OF RECOGNITION PROGRAMMES

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This document sets out key elements of the analytical framework underlying the assessment of policies for the recognition of non-formal and informal learning. It is intended that a revised version of this document will become a chapter of the International Synthesis Report on Recognition of Non-formal and Informal Learning that will be prepared next year.

National Representatives are invited to comment on the findings and propositions contained in this paper and suggest ways forward.

Patrick Werquin, Education and Training Policy Division, Directorate for Education, +33145249758, patrick.werquin@oecd.org, www.oecd.org/edu/recognition

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**TERMS, CONCEPTS AND MODELS FOR
ANALYSING THE VALUE OF RECOGNITION[1] PROGRAMMES[2]**

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[1] Recognition of non-formal and informal learning.

[2] Patrick Werquin would like to thank Anne-Marie Charraud, Lorena Marrero, Michel Aribaud, Jens Bjørnåvold and John West for their useful comments on earlier versions of Section 1. The errors remain mine.

0. Introduction

1. This paper aims at providing ways of analysing whether it is appropriate for a country or any other entity (region, enterprise…) to set recognition programmes in motion. It is divided in two sections and has two annexes. Section 1 attempts at providing definitions for the main terms and concepts, so that communication is made easier among the different partners of the OECD activity on recognition of non-formal and informal learning. Annex 1 provides the background for these definitions as the context is rather complex and as there is no consensus. It describes some contextual elements, such as the over time evolution of the approaches to recognition of non-formal and informal learning for a better understanding of the key issues. Annex 2 reproduces the definitions used in the countries that have provided a background report for the OECD activity on recognition of non-formal and informal learning. Section 2 suggests ways of thinking in terms of the value of recognition programmes.

1. Existing and Suggested Definitions of Terms and Concepts

1.1. Existing [Current] Definitions: Fuzzy Borders and Some Overlap

2. Section 1 is entirely conceptual. It seeks to provide a reasonable set of definitions for the main terms and concepts used by policy makers, researchers, practitioners and individuals in the field of what is called here, presently, *recognition of non-formal and informal learning*. Research has been trying for years to clarify the different concepts in use but a lot of uncertainty seems to remain, if not disagreement, about their meaning. At the very best there are still competing definitions for several terms and concepts and the difference between them sometimes seems quite subtle. This section, together with Annex 1 that should be read in conjunction with it, aims at clarifying the meaning and roles of some of the most important concepts.

3. Annex 1 provides the background that is summarised in Table 1.

Table 1. Keywords for Recent Definitions from the Literature

	Formal	Informal	Non-Formal
Coombs *et al.* (1973)	Formal **Education**: in the initial education and training system	Informal **Education**: true lifelong learning process, daily experience (friends, neighbours etc.)	Non-Formal **Education**: organised but outside the formal sector; serve identifiable clientele and has learning objectives
ISCED 97	Formal **Education**: in the initial education and training system, below age 20/25…	Informal **Learning** us intentional, but it is less organised and less structured…	Non-Formal **Education**: Organised and sustained; all ages; within and outside education institutions; education programmes for adults (literacy…)
EC (2000)	Formal **Learning**: in education and training institutions and leads to a qualification	Informal **Learning**: from everyday situation; not necessarily intentional	Non-Formal **Learning**: alongside mainstream system of education; does not lead to a qualification
EUROSTAT (2000 and 2006)	Taken from ISCED 97	Informal **Learning**: intentional, less organised, less structured than formal learning	Taken from ISCED 97
CEDEFOP (2005)	Planned and intentional **learning** activities	Not planned and non-intentional **learning** activities	Planned and intentional activities, no learning objective
OECD (2007a)	Formal **Learning**: in and educational institution, adult training centre or in the workplace	Informal **Learning**: from daily work, family or leisure activities. Not organised or structured. Unintentional	Non-Formal **Learning**: programmed but not assessed and does not lead to a qualification; intentional
CEDEFOP (2008)	Formal Learning: in a school, a training centre or on the job	Informal **Learning**: from daily work, family or leisure activities. Not organised or structured. Unintentional	Non-Formal **Learning**: planned activities but no learning objectives; intentional

4. As opposed to the definitions of formal and informal learning which seem to be quite consistent, with some exceptions[3], as long as one uses recent definitions, the definition of non-formal learning remains quite blurred. Formal learning is organised, has learning objectives and is intentional. Informal learning is not organised, has no learning objectives and is not intentional. In between, it seems clear that non-formal learning is organised but it could have learning objectives or not and be intentional or not. Often, it is additional conditions, such as duration and certification, which make the difference. As can be seen in Table 2, there are instances where formal and non-formal learning are quite similar.

Table 2. Synopsis of the Different Approaches

	Organised	**Learning Objectives**	**Intentional**	*Duration*	*Leads to a Qualification*
Formal Learning	Yes	Yes	Yes	*Rather long and/or full-time*	*Yes[1]*
Non-formal Learning	Yes or No	Yes or No	Yes or No	*Rather short, or part-time*	*No[2]*
Informal Learning	No	No	No	*NA*	*No*
Notes: 1. "Almost always" would be more accurate 2. "Usually no" would be more accurate					

5. The last two columns appear in italics because some countries or authors refer to duration of the learning period or to the awarding of a certificate/qualification at the end, to decide on the form of learning. But those arguments are not totally convincing because if all or part of non-formal and informal learning is recognised in the future, it will not be possible to continue using this approach in their definitions. In this context, the three other columns seem more relevant.

6. In the 1970s, planners and economists at the World Bank began to make a distinction between non-formal and informal learning and formal education as a response to the formal education system being considered too slow to adapt to the socio-economic changes taking place at the time. Non-formal learning in particular was linked to teaching certain groups of the population – but outside of the initial education and training systems – at a time when learning outside of an educational institution was not generally accepted or even known. This way of distinguishing formal and non-formal learning may not be so useful today – it is widely accepted that formal learning may take place in the workplace for instance – and it is probably why definitions have slightly evolved. It is for example very illustrative to consider all the learning that happens in colleges and workplaces but that is not part of the programme objectives. If the notion of non-formal learning did not exist, this mode of learning would have to be called informal, but at the same time it is not the same as everyday learning which is now considered informal learning. Therefore it is useful to have a concept and definition of non-formal learning which is rather organised, not assessed and may not have learning outcomes. Non-formal learning is clearly different from informal learning and it definitely adds nuances to the concept of formal learning.

7. The drawback of such a definition of non-formal learning is that it seems to happen only if and where there is formal learning; as it is happening alongside of formal learning programmes. It is an established concept from a statistical point of view since it seems that non-formal learning is happening a lot more and a lot more often for people already involved in formal learning activities. This may be a problem for instance if non-formal learning is to be used as a way of dealing with inequities in the lifelong learning system; because non-formal learning may become a tool to address these inequities provided that non-formal learning and its recognition does not go to those already highly qualified, which would increase the gap between the highly and the poorly qualified.

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[3] There seems to be no consensus on the definition of any of the three terms.

1.2. Suggested Definitions: Simplifying the Picture

8. This paper does not want to remain inconclusive and leave the debate too open in the short run. Therefore, in order to avoid overlapping of definitions, but at the same time based on the many existing definitions, it is suggested that the following approaches, as well as concepts provided in Table 3 be used.

9. First, all the references to whether learning leads to a certification or not would be dropped as they prevent terms from being used if/when different forms of learning are recognised. Second, no reference would be made either to whether the learning is happening in the workplace, in an education and training institution or elsewhere. Third, the duration of the learning, impossible to measure in most case, would be dropped too.

10. Therefore, only two components would be used to define the mode of learning:

- Whether the learning is intentional; or whether it happens as a side effect as it were; and

- Whether the activity, whatever it may be, has [a] learning objective(s) or not.

Table 3. Proposed New Definitions

There is intention to learn: The activity is planned as a learning activity:	Yes: Learning is intentional	No: Learning is not intentional
Yes: The activity has [a] learning objective(s)	Formal Learning (Type I Learning)	Semi-formal Learning (Type III Learning)
No: The activity does not have [a] learning objective(s)	Non-formal Learning (Type II Learning)	Informal Learning (Type IV Learning)

11. In short, it is proposed to remove uncertainty by using the four cells of a cross tabulation where only two entries would be used: learning objectives and intentionality. In other words, it is acknowledged explicitly that individuals learn all the time and everywhere but it may happen during activities that have explicit learning objectives or not and individuals being aware that they are learning or not. Individuals are learners, this cannot be disputed. By way of examples:

- They may learn during courses or during training session in the workplace; this is <u>formal learning</u>. The activity is designed as having learning objectives and individuals attend with the explicit goal of acquiring skills, knowledge or competences. This definition is rather consensual;

- They may learn during work or leisure activities that do not have learning objectives but individuals are aware they are learning; this is <u>non-formal learning</u>. Individuals observe or do things with the intention of becoming more skilled, more knowledgeable and/or more competent;

- They may learn during activities with learning objectives but they learn beyond the learning objectives; this is <u>semi-formal learning</u>. This is a new term that is proposed here. Individuals have the intention of learning about something and, without knowing it, learn also about something else; and

- They may learn in activities without learning objectives and without knowing they are learning; this is <u>informal learning</u>. This definition is rather consensual.

12. The notion of learning objectives – whether the activity is planned or not as having learning objectives – is very close to what (CEDEFOP, 2005) calls "structure of the context". The difference is that all four categories are clearly mutually exclusive. In fact, it is claimed that whether the learning is planned,

whether it has learning objectives or its context and structure are different ways of expressing the same variable and it is the left hand side column of Table 3. The other useful variable is whether the learning is intentional. In both cases, learning objectives and intentionality, there are pros and cons. However they lead to a clear situation with no overlap. There are cons about the existence of learning objectives because the phrasing of a leaflet about some activities, for instance, may decide whether there are learning objectives or not, whereas the content of the programme is rigorously the same anyway (West, 2007). There are pros because what is in focus when recognition programmes are implemented is precisely what people know or can do and this is never obvious to applicants when, precisely, the learning has not been intentional. In short, individuals learn but they may or may not have learning objectives and they may or may not learn intentionally: these are categories useful to recognition of non-formal and informal learning. When it comes to documenting skills (individual side) or to recognising them (society/system side), there seem to be the two components that matter. It is well documented at the ground level and well reported by practitioners. They are key categories because <u>what is unknown to people is probably what has value</u> – and can bring potential benefits beyond those delivered by the qualifications people already have – and because it is the costly part to document and recognition skills, knowledge and competences that are deeply inside people and therefore difficult to identify as such.

13. As already proposed in Werquin (2007), the novelty is obviously the creation of a fourth type of learning – semi-formal learning – that seems to be happening quite often and that <u>recognition processes have identified</u>: individuals often learn way beyond any given initial learning objectives. They learn about themselves, about team working about behaving in groups, whether heterogeneous or homogenous… It is close to the concept of informal learning but it is happening in the context of a formal learning activity, as it were, and this is the value of it. Finally, it may prove appropriate to move away from trying to give names to the different types of learning and, instead, to use <u>neutral appellations</u>: Type I, II, III and IV learning is a suggestion (see Table 3).

14. To avoid using long lists such as non-formal, semi-formal and informal learning, it should also be possible to call these three concepts *the learning that is not formal*. In the rest of this paper, the concept of semi-formal learning will not be used but it is clear that the OECD activity should probably be called recognition of non-formal, semi-formal and informal learning if the proposed new definitions were accepted by the participants.

1.3. Conclusion and Discussion

15. There is an extensive and quite ancient literature on the extent and distribution of self-reported learning activities[4]. The literature on non-formal and informal learning seems to be older than the one on recognition of non-formal and informal learning[5]. Some countries have a long tradition of documenting all kinds of skills (France, Norway, among others); however, existing literature often examines specific issues concerning targeted groups of the population such as the elderly, the low skilled, the adults; or rather a specific set of issues (learning in the workplace, integration of immigrants[6], etc.), but a large body of evidence exists about how best to make use of learning that is not taking place in the formal education and training sector. This body of evidence has come up with the concepts of *recognition, validation* and *certification*. Charraud (1992) states that Napoleon introduced the training of a hierarchy founded on merit. This training involved examinations which were the same everywhere, and was attested by diplomas conferring identical rights to its recipients. In France, the first law on recognition of learning outside of formal settings was passed in 1934. There is a lot of evidence in this area, not to mention the writings of the Greek philosopher, Plato, who said that studying is studying about oneself – which some authors would

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[4] In addition to the reference provided in Annex 1, see also Livingstone (2000 and 2002).

[5] The literature on recognition of formal learning is of course very important too but not reported here.

[6] See for instance Coombs *et al.* (1973), Steele and Taylor (1995), Thompson (1981), Torres (1990), Andersson *et al.* (2004.)

label as alongside non-formal learning. However, the question of whether non-formal and informal learning should be made visible and how it could be made visible is quite recent. The subtle distinction that seems to prevail these days between non-formal and informal learning can even be characterised as relatively new: it was introduced by the World Bank at the beginning of the 1970s and popularised by Combs *et al.* (1973).

16. From a conceptual point of view, it is important to acknowledge that formal, non-formal and informal learning do not lead to different skills and competences or to a different knowledge. The skills, knowledge and competences acquired are the same whether the learning was done in formal settings or not; even if, as pointed out by West (2007), some modes of learning are more conducive to certain subject matters than others. The distinction is about the context and settings in which they have been acquired and about the objectives and intentionality of the learning (CEDEFOP, 2005). The different forms of learning seem to make a lot of sense to researchers and policy makers but any kind of learning may lead to the same skill(s), knowledge and competence(s). What really matters when setting in motion recognition, validation and certification programmes is what people know and can do. The specific focus on the learning outcomes explains why recognition of non-formal and informal learning is also called *recognition of learning outcomes* and why some countries would rather talk about acquired skills and competencies, which are the outcomes, rather than non-formal and informal learning.

17. The current difference between formal, non-formal and informal learning appeared quite recently. Nowadays, formal and informal learning seem to have rather consensual definitions: the first one is intentional, organised and has learning objectives; whereas the second has none of the above. Original definitions opposed learning in initial education and training educational institutions and the rest. Nowadays, it is agreed that formal learning could happen in the workplace. The distinction is, or should be, made on the following criteria: organised, learning objectives and/or intentional. In addition, two other criteria may be useful to qualify learning but not to define it: duration and whether it leads to a qualification (whether it is assessed or not is a weaker alternative because there may not be any visible, usable and transferable award.) A lot of studies retain the absence of final certification/qualification as the main element of the definition. This is probably an error – and CEDEFOP (2005) stresses only context and intentionality – for at least two reasons. First, because it is more consistent to define a learning activity in terms of its learning objectives (and whether it is intentional or not) and the way it is organised (context) rather than by the authentication of it by accredited bodies (CEDEFOP, 2005) – which is a step that comes at the very end and that is not part of the learning process. And second, above all, because if countries succeed in recognising non-formal and informal learning, then the distinction between them will disappear and it will not be possible to sustain such a distinction based only on the awarding of a qualification. In any case, it seems a lot safer, for communication purposes, to keep a clear separation between the different concepts of learning (formal, non-formal and informal) and the way this learning is made visible (the qualification process through recognition and validation.)

18. A natural question that arises quite often among experts is whether recognition comes first and then validation or whether it is the other way around. This discussion is linked to the statement made above that the word *recognition* embraces two different concepts and to the third assumption made earlier about the existence of a value to the applicant. The issue arises because it seems that the word *recognition* is used with two different meanings; and there seems to be little awareness about the risk of confusion. There is first of all the *technical recognition* (or "formal" recognition, CEDEFOP (2008)) which relates to determining the methods to communicate this learning to the wider world. Consequently, this is about how to best identify learning and communicate it to the broader world (the portfolio is a good example; but a degree from the academic world is the typical example from the formal sector.) This technical recognition could also take the shape of self recognition by the applicant, which is very different from the second meaning having to do with *social recognition*. CEDEFOP (2008) proposes: "social recognition of learning outcomes is recognition of the social value of the competences by the economic and social partners."

OECD (2007) states that "a qualification confers official recognition of value in the labour market and in further education and training." It is therefore clear that recognition has a second meaning in this context; which is about the currency of what has been recognised and its social value. In addition to having two meanings, the word recognition also identifies two different steps of the process: one at the very beginning of the recognition, validation and certification process; the other at the very end of it, once the certification/qualification has been awarded. In short, the sequence is: there is technical recognition[7], then validation/assessment, followed by certification/qualification and the process ends there. Nevertheless, as stressed by assumption 3, the key element is probably to know whether there is social recognition of the certification/qualification that has just been awarded, and this social recognition should be distinguished from technical recognition.

19. To avoid confusion and facilitate the understanding of the term recognition, the following general definitions are proposed: *technical recognition of learning is the process of recording of achievements of individuals arising from any kind of learning in any environment; the process aims to make visible an individual's knowledge, skills and competences so that this individual can combine and build on learning achieved and be rewarded for it* (adapted from OECD (2004b)). Therefore, *recognition of non formal and informal learning is the process of recording of achievements of individuals arising from any kind of learning outside formal settings (learning that is not Type I learning); the process aims to make visible an individual's knowledge, skills and competences so that this individual can combine and build on learning achieved and be rewarded for it*. In addition, when it comes to the second meaning of recognition, it is probably less confusing to use instead the term <u>recognition of a qualification</u>; with the added value again that most of these issues are not specific to recognition of non-formal and informal learning.

20. The OECD activity (OECD, 2007b) uses the term *recognition of non-formal and informal learning* – instead of *certification of non-formal and informal learning* as proposed earlier – because the two elements of the process are deemed essential. The term *recognition* is used, as opposed to *certification* and even to *validation*, because it contains the technical element (identifying and agreeing on the existence of skills, knowledge and competences), as well as the social status component (social recognition of what has been acquired throughout life and achieved through a recognition and validation programme.) A fully validated and certified qualification may not have, in the worst case scenario, value in the labour market; whereas a certificate delivered by a vendor or an international institution may not, in some cases, be validated by the accredited national authority and still have value in the labour market. In this respect, it is essential to remember that what is validated has been officially approved by the authority in charge; what has value depends on the economic and social contexts. As stated above, the two words (validating, valuing) and their respective etymology are different, even if they somewhat overlap in the context of recognition of non-formal and informal learning. This opposition between *validation* and *value* would naturally lead to the discussion of trust and reputation or perception; but it will not be discussed here. In short, *recognition of non-formal and informal learning* is an acceptable term for designating recognition, validation and certification of non-formal and informal learning. *Recognition of learning outcomes* is a broader concept in theory but some authors tend to use *prior learning* as a shortcut for *non-formal and informal prior learning*. In that case, the two concepts overlap perfectly.

2. A Possible Analytical Framework for Evaluating Recognition of Non-Formal and Informal Learning

21. It is always difficult to propose solid recommendations in the midst of the process of discovering new territories. Recognition of non-formal and informal learning – or recognition of non-formal, semi-formal and informal learning – is not really considered to be new ground but the pieces of evidence gathered to justify that recognition programmes are set in motion are quite scarce and sometimes inconclusive. The

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[7] The mere fact that it could be self recognition suffices to prove that this is the necessary first step for the applicant to achieve a qualification.

OECD activity will deliver its final recommendations at the end of 2008 and although it is somewhat early to anticipate what these recommendations will be, two lines of thought are proposed below.

22. With no intention of being comprehensive, and only half way through the activity, it seems that two issues or sets of issues should be addressed with high priority when [thinking of] designing and/or implementing recognition programmes. The first one is about social recognition of the qualification delivered after a recognition of non-formal and informal learning programme. The second is about the cost of recognising individuals' non-formal and informal learning.

2.1. Addressing the Issue of Social Recognition before the Issue of Technical Recognition

23. As described in Section 1 and Annex 1, the issue of recognition is clearly a key issue that should be addressed first and foremost when countries consider setting recognition programmes in motion or implementing recognition systems. It is not specific to recognition of non-formal and informal learning as it may be the case that qualifications awarded by the formal system do not carry value (social use and social value) and therefore are not very useful[8]. But this issue is even more critical for qualifications awarded after a recognition on non-formal and informal learning programme as the recognition process may be costly in terms of time and money and organising recognition programmes makes sense only if they deliver qualifications that have value.

24. This point will therefore rank quite high in the list of recommendations provided in the next version of this paper. Qualifications awarded after a recognition of non-formal and informal learning programme should have value for the people or for the market. Otherwise, it is very likely that the system will be unsustainable, regardless of the faith the promoters have in recognition of non-formal and informal learning.

25. This will immediately lead to an interesting point that can be made already as a way of triggering discussion: most of the literature on recognition of non-formal and informal learning emphasizes the fact that it improves people's self esteem. It is indeed largely acknowledged that people come to realise they have skills, knowledge and competences when they start documenting them. The drawback with this approach is precisely that this process of getting people to realise they have knowledge, skills and competences may be incredibly resource consuming; even if the assumption is often made that this is a rather cheap process (see Section 2.2 for a framework for addressing this question). In short, it takes time and money to make people realise they have knowledge, skills and competences, mainly because most of the time it cannot be achieved without the help of advisers that are guiding individuals through the recognition process; and this comes at a price.

26. There is a second drawback that is probably even more crucial: it is very unlikely that countries will be able to sustain recognition systems and continue financing them if these processes only help in improving people's self-esteem. In other words, recognition systems will eventually have to demonstrate that the qualifications they lead to have value for the labour market, the economy and/or the society. In this endeavour, several ministries will probably have to be involved as recognition is often presented as a cheaper alternative to training. This is now addressed in Section 2.2.

2.2. Cost of Recognition Programmes and Training as a Credible Alternative

27. Section 2.2 is a bit more advanced than Section 2.1 but further refinements and improvements are still under consideration.

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[8] At least, it is a point that is often made among practitioners.

28. The list of benefits that could arise from setting in motion recognition of non formal and informal learning systems is quite long and benefits are of unequal importance and value for users. Nevertheless, it seems that the following list of not necessarily mutually exclusive benefits could be proposed:

- Recognition of non formal and informal learning makes skills and knowledge visible. This is a fact. For successful applicants, recognition programmes end up in the awarding of a qualification.

- As a consequence of the previous point, recognition of non formal and informal learning may help spotting the gaps in existing skills, at a country or enterprise level, as recognition processes make skills, knowledge and competences visible through the awarding of a qualification.

- Therefore, recognition of non formal and informal learning is a tool for planning training and learning activities.

- It is often argued that recognition of non formal and informal learning improves the self esteem of applicants as they become aware of the fact that they do have knowledge and skills. It may increase their confidence and productivity as well as the trust of the others; in the enterprise, the family or the community.

- It mechanically improves the qualification distribution of a population since successful applicants are awarded a qualification for what they know or can do; whether this impact is significant in terms of size remains to be proven.

- Recognising what people already know or can do avoids that they have to start from scratch when they undertake learning activities and therefore it could promote lifelong learning (see Section 1 and Annex 1). By the same token, it may facilitate a more tailored approach to the development of training and learning paths for individuals. That may lead to more effective training expenditure.

- Recognition of non formal and informal learning improves the employability of job seekers and the perspectives of mobility for job owners. This is because many labour markets use qualifications as a proxy for skills, knowledge and competences since qualification are observable and skills are not. In addition, qualifications are often well known constructs and therefore they are rather transparent in terms being trustable or not; and employers are risk averse when recruiting new workers.

- Recognition of non formal and informal learning techniques are often used to reduce the studying time required to be awarded a qualification from the formal system. Often, these exemptions are used as entry routes into the tertiary education system.

29. In short, recognition of non formal and informal learning systems seems to have the potential to provide applicants with qualifications that may have a double currency: in the labour market but also in the lifelong learning. However, as sometimes mistakenly thought, it seems rather obvious that recognising non-formal and informal learning does not create skills and competences. It just make them visible; even if the case could be sometimes made that rising awareness of someone's skills has a strong impact of the use s/he may make of these skills.

30. Most of the benefits above arise from this new visibility. However, the issue remains whether these benefits are large enough compared to the cost in terms of time and money of documenting individuals skills. This cost is often presented as low for the applicant and for the system (information and guidance officers, employers, assessment panel, awarding institutions, governments) but it may not be the case.

31. The rest of this section attempts at proposing a model for assessing the cost effectiveness of recognition programmes. The fact is that there is a major alternative to recognition of non formal and informal learning: just sending people on training!

32. Most of the arguments above aiming at providing a credible rationale for recognition programmes remain to be substantiated (see OECD, 2004, for a review of pros and cons and existing arrangements) even if there are good reasons to believe that a lot of them are valid in the long run. Because recognition of non formal and informal learning <u>does not create skills</u>, policy for creating skills may not rely solely on recognition programmes. They should rather use them as an initial step to identify skills gaps and to promote lifelong learning, especially among potential adult learners. For a country, or any other entity such as an enterprise, to consider setting recognition programmes in motion for non-formal and informal learning, at least three assumptions need to be made:

- **H1**: [There are reasons to believe that] individuals have skills, knowledge and competences that are not already recognised and validated in a qualification; from the formal lifelong learning system for instance.

- **H2**: These skills and competences and this knowledge have value either for the individual, for someone in his/her life (family, employer), for the economy or the society.

- **H3**: These skills and competences and this knowledge that are not yet recognised, can be [technically] assessed.

33. H3 can be rewritten in[9]:

- **H'3**: The cost of recognition of non formal and informal learning remains within reason; so that there is a net economic benefit.

34. In short, the first three hypotheses H1-H3 mean that there is no point in recognising what people know or can do if such skills are not present, if they have no value at all or if it is impossible to assess them – at least at an affordable price.

35. Among other things, the first assumption clearly means that individuals must not be too young – beyond compulsory education of maybe upper secondary education seems to be a reasonable threshold – as it is difficult to seriously believe that a lot of learning has happened outside of the formal education and training system at an early stage in someone's life; or at least that it is not worth investing in identifying and documenting these skills and competences that are likely to be marginal compared to those certified by the formal system. The cost may be too high for the expected benefits for most young people, unless maybe for early dropouts or other unqualified people that have had a lot of learning but could not get any of it certified.

36. The second assumption implies that a lot of attention needs to be paid to the outcomes of any kind of recognition, validation and certification programme for non-formal and informal learning. A typical outcome could be a qualification and could allow people to communicate their knowledge, skills and competences to the wider world.

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[9] An alternative model would have H3: Assessing these skills and competences is technically efficient and H4: Assessing these skills and competences is economically efficient/viable. The model with H'3 replacing H3 is preferred as it is assumed that all skills and competences are technically assessable as long as they are useful for the enterprise, the economy or the society. However, the price cannot be set up front as it depends upon the value attributed to the qualification that will be delivered. This is why H'3 remains very vague in terms of appropriate cost. This aspect of the model will developed in its next version.

37. The third assumption means that there is no point in saying that an individual has skills, knowledge or competences if there is no way to assess them; or if it is too expensive as rewritten in H'3. The standards against which these skills and competences and this knowledge are assessed are also key element of the recognition process.

38. The last hypothesis H'3 is a more pragmatic assumption than H3 and it allows for further elaboration. H'3 means that there is no point in recognising what people know or can do if it is too expensive. The question therefore is what "too expensive" means? The idea is that recognition programmes must be reasonably affordable so that the cost of achieving a qualification through a recognition of non-formal and informal learning programme is not higher than the cost of sending the individual in a regular course within the formal lifelong learning system (in the education and training formal system or on the job for example). The opinion that direct costs associated with further learning activities could be lower in all circumstances thanks to recognition of non-formal and informal learning, remains to be proven in almost each case and will be addressed in the next section.

39. As Figure 1 proposes that the marginal cost of recognition programmes is globally increasing with the number of applicants. The marginal cost is the cost for each additional individual going through a recognition programme. The graph suggests that the cost increases because it is assumed that the first individuals to enter a recognition programme are highly motivated, well taken care of by the information and guidance officers and that they have non-formal and informal learning experiences that are easy to recognise. In fact, it suggests that the cost for the very first individual is a bit higher than the minimal cost because the system needs a little bit of practice to reach full speed and be actually really cost effective. In short, the marginal cost of recognition programme is equal to C_i (n_i=1) for the first individual to enter the programme, then it goes down for a little while until the system is fully efficient (C_m) and takes care of n_m applicants, it soon/then starts increasing because it becomes more and more difficult to find applicants that have previously acquired skills, knowledge and competences that are easy to document and evidence.

Figure 1.   Recognition vs. Training
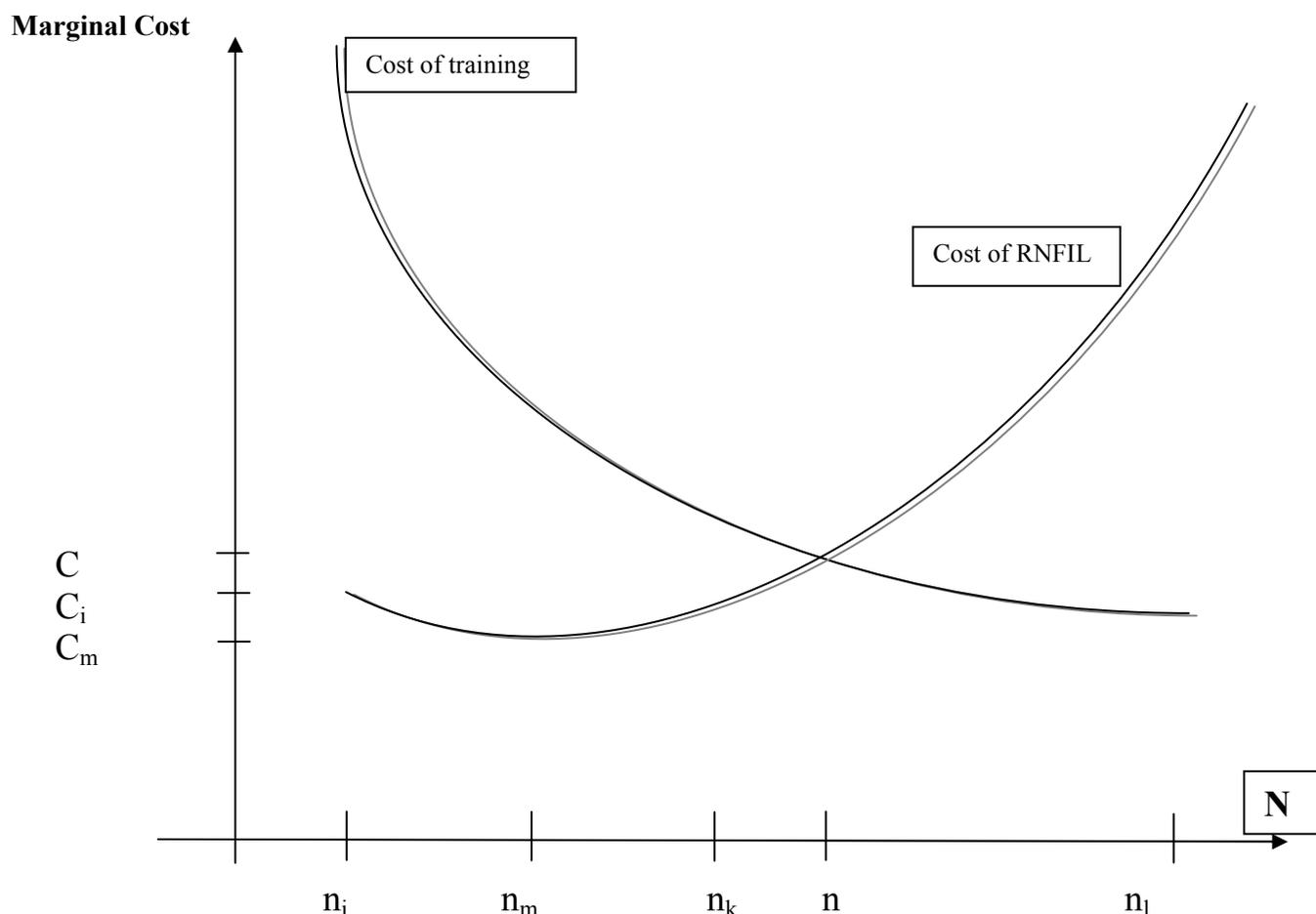
Source: proposed by the author

- X-axis: **N**: number of individuals on training or in a recognition programme
- Y-axis: **Cost** for one individual, either of training or of going through a recognition programme

Main tags on X-axis:
- n_i: number if individuals when RNFIL are set in motion (initial cost)
- n_m: number of individuals when cost of RNFIL is minimal (C_m, after the system has reached cruising speed)
- n_k: number of individuals when cost reaches again the initial cost
- n: number of individuals where cost of organising RNFIL is equal to cost of sending individuals on training
- n_l: number of individuals when cost of RNFIL has rocketed to the sky because all the people for which documenting skills is easy have been through a RNFIL programme already and only the difficult cases are left. At this stage, training is comparatively cheap because if a high number of individuals are on training, the marginal cost of training is low (close, but not necessarily equal to C_e)

Main tags on Y-axis:
- C_i: initial marginal cost when recognition programme are initially set in motion
- C_m: minimum marginal cost for recognition of non formal and informal learning
- C: marginal cost where an additional applicant in a recognition programme costs the same as an additional trainee.

40. Figure 1 also suggests that, on the contrary, the marginal cost of training is decreasing with the number of trainees; because what is expensive is probably to set the programme up. When initial expenditure (facilities, trainers, learning documents and their preparation, practice material…) is given, the cost of each additional trainee is likely to be lower (facilities already paid, trainers already there, documents already prepared) and consist only of learning documents and practice material.

41. In short, each new trainee entering a training course benefits from return to scale as there was an initial investment made for the individuals that are already taking the course or that took it. Each new applicant to a recognition programme almost does not benefit from return to scale: the full documenting process has to be done from scratch, involving time and money.

42. It is claimed here that the marginal cost is a more interesting concept than the average cost (total cost divided by the number of individuals). The latter is systematically decreasing with each additional individual but it may remain high in both case – recognition or training – and does not sufficiently inform about the real cost of each additional individual.

43. Figure 1 finally suggests that there is a number of individuals interested either in training and/or in a recognition programme for which the marginal costs of training and recognition are equal: n. It is suggested that whenever the number of individuals is less than n (n_k for instance), then training is more expensive and therefore recognition of non formal and informal learning more cost effective and, on the contrary, when the number of individuals is greater than n (n_l for instance), then it is less expensive to send people on training.

44. The real difficulty is therefore to calculate C or/and n in each practical case countries or enterprises are dealing with. It seems obvious that this general model should be used for each skill or category of skills training aims at providing or recognition programme at identifying. This is because costs of training are highly dependent on the type of skills provided. The comparison between the cost of training and the cost of recognition – and therefore the value of n – will be highly dependent of the type of skills under consideration. In any case, the model suggests that, all individuals should be sent to training rather than recognition from n+1 on.

45. An interesting feature of the model is that it clearly shows why and how infrastructure costs that recognition programmes initially incur are sometimes/often initially subsidised by public finances. Table 5 shows that more individuals (n'>n) can be oriented toward recognition rather than training if recognition programmes are subsidised; the additional number of acceptable applicants is given by n'-n.

Figure 2. Recognition vs. Training
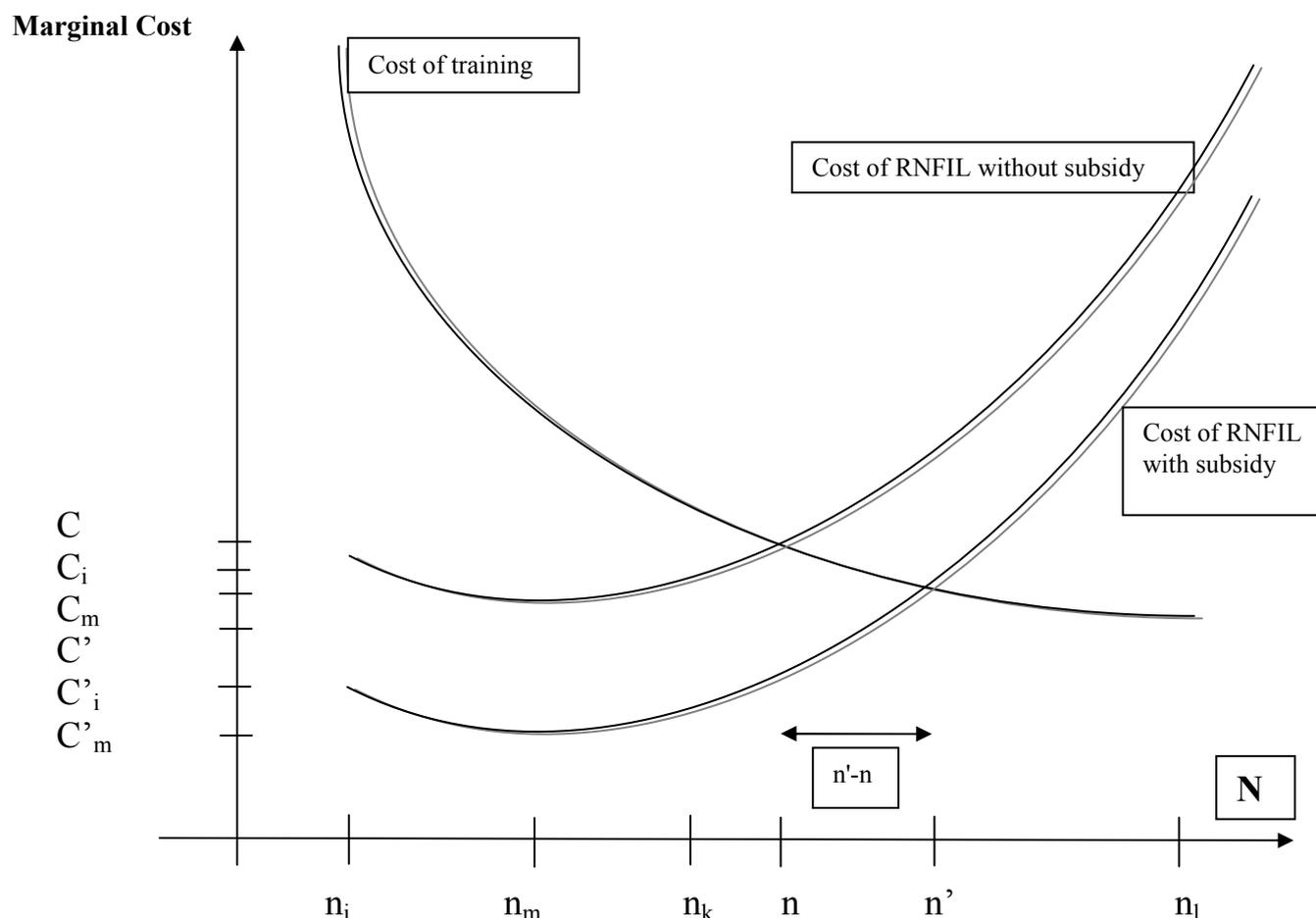
Main new tag on X-axis:
- **n'**: number of individuals where cost of organising RNFIL is equal to cost of sending individuals on training when recognition programme are subsidised

Main new tags on Y-axis:
- **C'$_i$**: initial marginal cost when recognition programme are initially set in motion, in the presence of subsidies
- **C'$_m$**: minimum marginal cost for recognition of non formal and informal learning, in the presence of subsidies
- C': marginal cost where an additional applicant in a recognition programme costs the same as an additional trainee, in the presence of subsidy.

46. The model may also show that initiating recognition programmes may not be worthwhile in some instances: pilot programmes for instance may show that the cost of documenting skills in some instances is higher than the cost of training. When numbers are available and, again, there heavily depend on the

context and the learning outcomes targeted, the model may prove an interesting tool for decision makers. It questions the assumption usually made and barely questioned that, in the case of recognition of non formal and informal learning, there is a cost that comes from the time and effort it takes to document someone's skills. It may not be that cheap and, but this would require further developments, it may be highly inequitable since highly qualified people already have CVs, carefully stored labour contracts and payrolls as well as all sort of documents that prove the claim they are making about the skills they have. The Matthew effect that is largely documented in the field of adult learning may also be an issue in the field of recognition of non formal and informal learning. The model proposed above deals with this issue by comparing incorporating the time for documenting her/his own skills in the model.

47. Another advantage of this model is that it does not address the problem of whether it is suitable to organise recognition programmes by comparing costs and benefits; which often fails in taking into account the time horizon. In comparing the cost of recognition vs. the cost of training, the role of the remaining period of time over which recognition or learning will deliver benefits is the same and is therefore neutralised. It is an issue in both cases as investing in a qualification pays off for a longer period of time when individuals are young but it does not impact on the choice of training vs. recognition.

48. This model deals with the direct cost of recognition of non formal and informal learning compared to the direct cost of learning in the formal lifelong learning system. A natural question is therefore whether opportunity cost could radically change this model. In a way, it is assumed here that opportunity costs in terms of forgone earnings and time lost for leisure and other personal activities while documenting her/his own skills or while learning are the same, both processes being rather time consuming in fact; even if, to justify setting in motion recognition programmes, it is often said that documenting skills is less time consuming.

3.3. Next Steps

49. In the course of the activity, effort will be necessary to develop models on how to estimate the costs (e.g. money, time, people and tools) involved in establishing a recognition process. How to estimate the benefits will be another issue and for whom these benefits are will be another one.

50. Then will come the question of the funding of recognition of non-formal and informal learning, if deemed necessary or acceptable as an alternative to training. The good thing is that the model above will position recognition of non-formal and informal learning and training next to each other and, when the figures are available, the decision should be relatively easy.

51. In the meantime, the background documentation provided by the participating countries and the review visit will show how recognition of non-formal and informal learning is or can be funded. There seem to be a different range of payers, from individuals to awarding body, provider of recognition of non-formal and informal learning, employers and other public or private funding.

52. The modelling could be at the macro level (similar to returns to investment in education) or at the micro level for particular kinds of RPL or to meet particular needs.

**ANNEX 1 – TERMS AND CONCEPTS: THE BACKGROUND FOR SECTION 1.
A COMPLEX FIELD THAT HAS BECOME MORE COMPLEX**

This annex should be read in conjunction with Section 1 above. It provides details about the historical context and the background that lead to the today definitions of terms such as recognition, validation, certification and assessment, as well as formal, non-formal and informal learning.

Taking into account what individuals already know and can do is being examined as a possible response to the lifelong learning agenda in many countries in their quest to make lifelong learning a reality for all. It is also a crucial component of modern human resources strategies in the labour market and a step to be considered on the road to pedagogical innovation, especially for the adult population. For all these reasons, this topic constitutes a high priority on many countries' agendas in a large number of European Union and OECD economies and beyond (Chile and South Africa, among others, are good examples). There are indeed reasons to believe that taking into account what individuals know and can do, whether it is certified or not (and therefore whether it is a qualification or not), could make subsequent learning more affordable for potential learners who already have some experience in the domain in which they consider undertaking further learning activities. This will be accomplished by cutting on direct costs and opportunity costs. However, the opinion that direct costs associated with further learning activities could be consequently lower in all circumstances thanks to recognition of non-formal and informal learning, remains to be proven, but this topic will not be addressed in this Section 1 or Annex 1 (see Section 2). Nevertheless, it seems to be the case that recognition of non-formal and informal learning has been implemented in many countries in part due to the belief held by some of the stakeholders – oftentimes governments – that it is a good strategy to promote lifelong learning in general and to increase adult participation in learning in particular.

This is a complex field because several twin concepts cohabit – it is not necessarily easy for users to make the difference between non-formal and informal learning, both from a theoretical and empirical point of view – and there is little or no statistical data to provide examples for the theoretical concepts and to legitimate the differences being made between the various forms of learning. It is a complex area also because there is little evidence about the cost/benefit of recognition of non-formal and informal learning and its implementation, in most cases, has been based on faith. In particular, there has been little interest in making the connection between recognition of non-formal and informal learning and adult learning at the theoretical level, even if the former is supposed to trigger more of the latter.

It is worth noting that, to a certain extent, it is a lot easier to deal with the concept of recognition of non-formal and informal learning rather than with just non-formal and informal learning because the former requires concrete actions and specific arrangements to exist, and it is therefore easier to identify and rather measurable; whereas the latter happens everywhere and at all times as individuals are continuously exposed to learning situations throughout their lives. For this reason, non-formal and informal learning is difficult to measure, both in terms of the number of individuals involved in non-formal and informal learning and in terms of measuring costs and benefits of learning non-formally and informally and having this learning recognised.

A.1.1. Two Separate Sets of Concepts, a High Degree of Convergence

In this research and policy field, many terms are used – recognition, validation or certification, to name a few – but it is only recently that researchers, practitioners, policy makers and even users felt the need to clarify them. Until the last decade, the terms recognition, validation and certification were used almost as synonymous and did not pose any specific problems; at least not in the domains of education and labour (Charraud, 1999). Not surprisingly, the meaning of the words has become an issue when countries have started to pass bills, draft laws and adopt legislative frameworks describing the technical and institutional arrangements required for recognising, validating and certifying what people know and can do regardless of the means by which they have acquired these skills and competences or gained this knowledge. The pressure to clarify the terminology also came from the users, researchers, practitioners and individuals, because they all felt the need to better communicate with one another in an area where the vocabulary was unclear and, worse yet, not shared within and between countries. The role of international organisations in this endeavour has been quite significant .

There seems to be two different sets of terms and two corresponding major bodies of research which have tried to provide definitions for them and, frequently, have used them without necessarily making a distinction between them (both from the conceptual and historical points of view.) This has resulted in the expected overlapping of meanings which has often led to some confusion in this field. The first set of concepts is related to the notion of learning. Here there are many different terms, the most frequently used being: formal, non-formal and informal learning, used together or separately depending on the situation; prior learning, which seems to have lost its initial broad meaning (learning done previously) to become an explicit synonym of prior non-formal and informal learning; experience or prior/previous experience (this last one used in a pleonastic form in the context of recognition because the word "experience" implies the notion of something acquired in the past and therefore "prior" to something else, in this case prior to a recognition process); or even skills and competences which are not always or necessarily recognised in a qualification, or at least not until a recognition programme allows it. The second set of concepts has to do with the notions of recognition, validation and certification, but as soon as one talks about these concepts, the following question arises: "What exactly needs to be recognised, validated and certified?" which naturally takes us to the first set of concepts.

As a consequence, two sets of terms should be addressed and defined from a conceptual, technical, and sometimes, historical point of view: 1) the different forms of learning (formal, non-formal or informal) and other related terms such as experience or acquired skills and competences; and 2) the different processes to make this learning visible such as recognition, validation and certification as well as other related terms such as assessment and qualification. The reason why most authors are addressing jointly non-formal and informal learning and recognition, validation and certification issues is because non-formal and informal learning make sense, or present some kind of interest to most stakeholders, only if they are made visible; and it is here that the idea of convergence comes into play; and also because most of the approaches are largely policy driven and promoted by policy makers. There seems to be an agreement on the fact that the push for organising recognition, validation and certification programmes also came but less often from the main stakeholders but never from the research side. Even ex post, after these programmes have been through practical testing, the research world has still not validated them empirically and therefore faith in their legitimacy still remains the major driver.

For the sake of clarity, the two sets of terms and concepts will first be addressed and defined separately and then combined.

This will provide a better understanding of the most relevant issues dealt by Section 1 and Annex 1 and will help propose new solutions for approaching the concepts at stake; especially in terms of the chronological order in which policy making should organise technical and social recognition of

learning. As barely noted so far, most of the literature does not make the distinction between technical and social recognition and, worse, sometimes confuses them. In the field of recognition of non-formal and informal learning, the likely reason why these two terms/concepts do not appear as being clearly distinct steps in the certification process is because most of the research has focused on technical recognition – best practical and technical arrangements to organise recognition of non-formal and informal learning – and has not really paid attention to the social value and actual use of a given qualification delivered after technical recognition has taken place.

At this stage, it is essential to make clear that most issues having to do with recognition, validation and certification are not specific to non-formal and informal learning. The OECD activity is about recognition of non-formal and informal learning and therefore, this paper will concentrate mainly on these two concepts but it is interesting to note that not enough attention has been paid to social recognition (value and use) of qualifications delivered after a period formal learning, either in the education and training systems or in the workplace for instance. The best evidence for this is that some, and sometimes many, of the qualifications delivered in the formal learning sector are reputed as not being very good. The impact of this reputation is well known to most users of qualifications, such as employers, who often rely on their own network(s) to select new recruits.

In short, social recognition of qualifications, whether achieved in the formal system or not, depends on their (social) use in getting jobs and on how they are valued in society; but not necessarily in terms of a passport to a job.

A.1.2. Assumptions

For the discussion to be useful and for a country to consider setting recognition, validation and certification programmes in motion for non-formal and informal learning , at least three assumptions must be made. These assumptions are useful here to introduce the discussion about the terms and concepts used in this field. First, individuals must have skills, knowledge and competences which are not already recognised and validated through a qualification. This qualification would typically, but not necessarily, be delivered following the completion of an education and training programme in the formal system. Second, these skills and competences and this knowledge, can be [technically] assessed, otherwise there is no point in saying that an individual knows or can do something if there is way to check it. The third assumption is that these skills and competences and this knowledge must have value either for the individual or for someone in his/her life. Here again, there is probably no point in recognising what people know or can do if it has no value. It could be value for the individual who applies for a recognition, validation and certification programme, it could mean that it would help improve the individual's self esteem or that it would help him/her play a more prominent role in their community; it could also mean value for some other actors or institutions interacting with these individuals, typically in the labour market (employers or recruiters.)

The first assumption clearly means, among other things, that these individuals should not be too young – that is, they should have completed compulsory education or be at the upper secondary education level, in both cases the threshold seems to be reasonable – not because they do not learn in a non-formal and informal way; but because most of what they learn is captured by their assessment in the formal system (school). Therefore, the cost of identifying and documenting the skills not already included in qualifications awarded by the formal system may be too high for the expected benefits, even considering that young people have the longest possible time horizon. This makes so much sense that a lot of countries are explicitly making the connection – either through the institutions in charge or in their official rhetoric – between recognition, validation and certification of what people know and can do and their adult learning systems. It is particularly obvious in Canada (Van Kleef, 2006) and in Denmark where the adult education

and continuing training systems were amended accordingly to include recognition of individuals' knowledge, skills and competences (OECD, 2008f.)

The case of young people remains an interesting topic for further research since a) they are the ones with the longest time horizon and therefore, the potential return on investment into recognition of non-formal and informal learning will happen on the longest period of time; and b) a huge fraction of school leavers, even in OECD countries, leave the initial education and training system with no qualification whatsoever (early dropouts). In the latter case, recognition of non-formal and informal learning could be a solution for them but again, provided that they have acquired sufficient skills, knowledge and competences in their initial education and training.

The second assumption leads to the definition of assessment, to its role and to the different approaches that are possible to organise it.

The third assumption implies that a lot of attention needs to be paid to the outcomes of any kind of recognition, validation and certification programme for non-formal and informal learning. A typical outcome could be a qualification that would allow people to communicate their knowledge, skills and competences to the wider world. It could also be an academic degree – if the recognition of non-formal and informal learning has been used to obtain exemptions for access to a formal programme for instance – or a professional license to practice a trade. All these outcomes could bring benefits to the successful applicant and this has to be taken into account when defining recognition, validation and certification because it may not make sense to recognise, validate and certify something that has no value at all. It is here that the two possible meanings of the word "recognition" may create a lot of confusion. To some, it refers to technical recognition or how identification of learning is communicated to the rest of the world. To others, it means social recognition by the labour market and the society at large; which means value and use of the qualification awarded after the technical recognition is done as stated above. This term has been a constant source of confusion, because it contains several concepts, and given its relevance, it is an issue that needs to be addressed.

Terms such as recognition, validation and assessment will be explained and defined individually. Thus, it will be easier to explain and define combined concepts as for instance recognition of prior learning, recognition of non-formal and informal learning or recognition of learning outcomes, and other related terms such as validation and certification. All these concepts are important because there is overlapping of definitions within the systems and programmes countries have set in motion in recent years.

A.1.3. Several Terms but a High Degree of Consistency

Whoever wants to explore the field of recognition, validation and certification of individuals' knowledge and capacities, would be confronted with two definitional issues. First, there is a need to define non-formal and informal learning. This step is absolutely essential even if the purpose of Section 1 and Annex 1 is not really to define what non-formal and informal learning is but rather to explain what recognition, validation and certification mean. Second, recognition, validation and certification will need to be defined. These two sets of terms and concepts will naturally lead to the concept of learning outcome and to the proposal of definitions for certification and assessment. However, these last two concepts will not really be addressed here.

As stated above and as the rest of this Annex and Section 1 will show, there are many terms used in parallel or in addition to one another in the field of recognition, validation and certification of non-formal and informal learning. Nevertheless, they seem to cover very similar ground and when compared, their definitions seem to be highly consistent with one another. This is mainly due, as stated above, to the

fact that these programmes emerge as a policy response to the lifelong learning agenda in many countries and as a result of the idea that what matters is to make learning visible.

Despite the high degree of consistency, there remain different terms meaning the same thing and different definitions for the same term. This is due to the fact that several authors have tried to provide their own input into the discussion, and also mainly to the fact that the push for organising recognition of non-formal and informal learning programmes has come from the stakeholders and therefore, they all provide their own definitions according to their needs and objectives on the ground. Once in a while, an author or a group of authors try to take stock and propose acceptable definitions (Prosser and Ahmed, 1973; Weil and McGill, 1989; Duvekot et al., 2005; Andersson et Harris, 2006; van Kleef, 2006), most of the time, these definitions complement or are in line with those proposed by international organisations (EC, 2000; EUROSTAT, 2006; OECD, 2007a). In the latter case, they are obviously the result of a consensus. But reaching a consensus has proven to be a rather difficult task and therefore, definitions are published as formulated by country delegates without leaving any room for these international organisations to exercise their usual editorial rights before publication. An obvious consequence is that slightly different versions of the same definition exist depending on the context it was agreed upon.

Nevertheless, it seems that some general acceptable definitions can be drawn. The rest of Annex 1 and Section 1 seeks provide some of the most significant ones in a rather organised way. They may come from national country contexts or international activities gathering different countries. They are the result of a necessary selection of the most important ones from the pioneering time to the most recent period with an evident stress put on the latter as this Annex and in Section 1 meant to be a useful up-to-date tool for readers.

A.1.4. Recognition, Validation and Certification of What? Formal, Non-formal and Informal Learning

For once, basic assumptions behind research work and policy making overlap quite neatly with the vocabulary and terms used in the literature. Therefore, it is indeed because the first assumption exist, i.e. that individuals have knowledge, skills and competences acquired outside of the formal education and training sector that there is a need to address non-formal and informal learning in terms of what they are and what nuances they bring. It is because there is the second assumption that these skills and competences as well as this knowledge can be assessed that the term assessment is defined and analysed further, usually in terms of its *formative* or *summative* approaches. Finally, it is because there is the third assumption that these different contexts in which learning happens lead to the creation of value that there is a need to define recognition, validation and certification.

Here again, it is worth remembering that the term *recognition* could have two different interpretations and that the notion of social recognition should probably be addressed in the first place by policy makers. It is because a qualification will have social value and will be used in society that it is worth creating a [certification] process for its recognition, validation and certification. And again, recognition is not specific to non-formal and informal learning, the term could also apply to formal learning.

The idea that individuals acquire knowledge, skills and competences throughout their lives and outside the formal education and training system is not new; this should be obvious as it is only since over a century ago that education was formalised. The first mention of the role of "experience" in learning can be found in Plato: "…there is no difficulty in learning from an example which has already occurred" (Plato, *Laws.*)

More recently, the concept of *life wide learning*, often used in conjunction with *lifelong learning*, is rather explicitly in focus in many studies and official documents. They have emphasised the idea that

learning happens everywhere all the time[10]. In the 1970s, UNESCO (1972) is a good example[11] of such a report. It is important to point out that the main concepts that are in use again twenty years later[12] (UNESCO, 1996; OECD, 1996) were already present in UNESCO (1972), contrary to people's believes that these concepts appeared only in UENSCO (1996). The broad concept of *life wide learning*, meaning that individuals learn everywhere and all the time, in any kind of settings; and the increasingly accepted idea that "learning cannot be reduced to passive reception of pieces of knowledge" (Bjørnåvold, 2000), naturally lead to the concept of *learning outcome* as it goes away from measuring learning in terms of the amount of input that enters the learning process (duration of learning typically, but also context). This concept puts the focus on what people know and can do as opposed to how long and where they have learnt. Therefore, the natural variable of interest is what individuals have acquired, which is typically what would be called *learning outcome* in English. French uses the word *acquis* which is close to "acquired" in English. *Acquis* is both a noun and an adjective and it can be found in the French 2002 law: *VAE, Validation des acquis de l'expérience*. In the French speaking province of Québec, Canada, the term favoured is: *Reconnaissance des acquis* or *Reconnaissance des acquis de l'expérience*.

Soon in this process of extending the learning experience beyond the formal education and training sector, the need was felt for more precise concepts and/or for a more precise definition of the concept of *life wide learning*. The notion of learning throughout life and in all settings was rapidly acknowledged and made a lot of sense. However, still today, there is little agreement about its different components. The most usual breakdown proposes the following three: *formal, non-formal* and *informal*. It is Coombs *et al.* (1973) and Coombs and Ahmed (1974) who popularised the institutional or bureaucratic categories of formal, non-formal and informal education, but it must be stressed that they use the word "education" instead of "learning." All three terms, and their variations, have different definitions (see Table 1 for a summary of the recent/important ones), but only *non-formal learning* still poses problems today as the various definitions provided in the literature are quite discrepant. The following paragraphs provide a non-exhaustive selection of the main and more recent ones.

Formal learning is defined by ISCED97 as "education provided in the system of schools, colleges, universities and other formal educational institutions that normally constitutes a continuous ladder of full-time education for children and young people, generally beginning at the age of five to seven and continuing up to 20 or 25 years old. In some countries, the upper parts of this ladder are organised programmes of joint part-time employment and part-time participation in the regular school and university system: such programmes have come to be known as the dual system or equivalent terms in these countries." This definition stresses aspects, such as age, that are not used anymore in current definitions. EC (2000) defines it in a much broader way as "taking place in education and training institutions, leading to recognised diplomas and qualifications." After several consultations with many countries in Europe and beyond in the early years of this decade, the OECD (2007a) proposed "formal learning can be achieved when a learner decides to follow a programme of instruction in an educational institution, adult training centre or in the workplace. Formal learning is generally recognised in a qualification or a certificate." This definition insists on the facts that a) formal learning can happen outside of education and training institutions, in the workplace for example; and b) it leads to a qualification, which should be seen as a possibility, not as a requirement since the word "generally" is used. The European-wide consultation on the European Qualifications Framework took this definition a bit further to meet the needs of the EU countries involved in building a European-wide meta framework. This shows how important it is to define terms in

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[10] The forthcoming CEDEFOP (2008) glossary defines it as: "learning, either formal, non-formal or informal, that takes place across the full range of life activities (personal, social and/or professional) and at any stage."

[11] UNESCO (1972) for example says: "If learning involves all of one's life, in the sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources, then we must go even further than the necessary overhaul of 'educational systems' until we reach the stage of a learning society."

[12] "This calls for lifelong education, involving not only the school, but also the home, the workplace, the trade unions or the army, which can also educate and train" (UNESCO, 1996.)

consultation with other countries – their needs have to be met – but also how important it is to define terms in a context-free situation to avoid catering to specific purposes that would ultimately not travel well in time and space. The forthcoming CEDEFOP (2008) glossary proposes: "learning that occurs in an organised and structured environment (in a school/training centre or on the job) and is explicitly designated as learning (in terms of objectives, time or resources.) Formal learning is intentional from the learner's point of view. It typically leads to a qualification." This version clearly states that formal learning must have learning objectives and that it should be intentional. It obviously matches quite well with CEDEFOP (2005) for which formal learning happens in "planned learning activities" and is "intentional". The latter definition has the merit of being very simple but it somewhat overlaps with the one of non-formal learning (see below).

It may seem awkward to spend so much time defining formal learning in a document dedicated to non-formal and informal learning. However, interestingly enough, this evolution of the notion of formal learning has had an impact on the related definitions of non-formal and informal learning, since some learning activities have been alternatively considered formal or non-formal depending on the period and the place. In a way, the three concepts are only interesting if they are mutually exclusive and therefore if the sum of the three encompasses all possible learning activities; even if Fordham (1993) suggests that there may be some overlap and consequently confusion between them, especially between non-formal and informal learning.

Since from the beginning formal learning by definition was organised and took place in the context of education and training institutions, some authors tend to only call it "formal education" (Coombs *et al.*, 1973; EUROSTAT, 2006); which makes sense but it tends to question the generally agreed terms of "lifelong learning" and "adult learning", for instance, where the focus is clearly on "learning" (what individuals do) rather than on teaching (what the institutions provide.) More importantly, using the term "formal education" alone denies the fact that formal learning may happen outside of education institutions; in the workplace, for instance. From this point of view, "formal education and training" seems to be a better term, or at least, it is not totally unsatisfactory. The Coombs *et al.* (1973) definition seems rather odd today: "formal education is the hierarchically structured, chronologically graded *education system*, running from primary school through the university and including, in addition to general academic studies, a variety of specialised programmes and institutions for full-time technical and professional training."

In fact, historically speaking, formal learning was only associated with the initial education and training system; hence the explicit mention of a maximum age in some definitions. Until recently, *formal learning* was opposed to *informal learning* only. The introduction of *non-formal learning* was the result of the necessity to create a new category that could add useful distinctions for pedagogues (learning objectives) and/or economists (cost.) This concept will be addressed later but first, the definition of informal learning will be discussed. Unlike for *formal learning*, the definition of *informal learning* does not pose any particular problems and seems rather consensual, with some rare exceptions.

Informal learning is defined by EC (2000) as: "a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills." OECD (2007a) proposes: "informal learning results from daily work-related, family or leisure activities. It is not organised or structured (in terms of objectives, time or learning support.) Informal learning is in most cases unintentional from the learner's perspective. It does not usually lead to certification." CEDEFOP (2005), again quite simply, retains only that informal learning is *non-intentional* and *not planned* from a learning point of view. The forthcoming CEDEFOP (2008) glossary proposes: "learning resulting from daily activities related to work, family or leisure. It is not organised or structured in terms of objectives, time or learning support. Informal learning is in most cases unintentional from the learner's perspective."

Again the definition of informal learning seems quite consensual: all in all, it is always unintentional, has no learning objectives and is never organised. Only the definition provided by EUROSTAT (2001) is completely discrepant from the entire literature since it states that "informal learning is defined as intentional, but it is less organised and less structured and may include for example learning events (activities) that occur in the family, in the workplace, and in the daily life of every person, on a self-directed, family-directed or socially directed basis." More surprisingly, it is quoted again as an acceptable definition in EUROSTAT (2006) where the notion of "random learning" – which is not intentional – is proposed in addition. Even pioneering definitions, such as that of Coombs *et al.* (1973), are quite consistent with what was expressed above, except for the fact that Coombs *et al.*, for example, use the term "education" which has to do with the system and therefore seems at odds with the concept of informal learning, generally accepted as a personal and individual process: "informal education is the truly lifelong learning process whereby every individual acquires attitudes, values, skills and knowledge from daily experience and the educative influences and resources in his or her environment – from family and neighbours, from work and play, from the market place, the library and the mass media."

Non-formal learning[13] derived from the need to distinguish further the different categories of learning as the distinction between formal learning and informal learning rapidly became insufficient when it came to taking into account important differences that had value for researchers and policy makers. However, defining non-formal learning is a rather difficult task and there seems to be no consensus as several distinct definitions of non-formal learning do coexist. Non-formal learning is defined by ISCED 97 as: "any organised and sustained educational activities that do not correspond exactly to the [] definition of formal education. Non-formal education may therefore take place both within and outside educational institutions, and cater to persons of all ages. Depending on country contexts, it may cover educational programmes to impart adult literacy, basic education for out of school children, life-skills, work-skills, and general culture. Non formal education programmes do not necessarily follow the *ladder* system, and may have a differing duration." It is a natural complement to the definition of formal learning provided by ISCED97 but some mentions such as "all ages" remain at odds with most current definitions. EC (2000) proposes: "learning that takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates. Non-formal learning may be provided in the workplace and through the activities of civil society organisations and groups (such as in youth organisations, trade unions and political parties.) It can also be provided through organisations or services that have been set up to complement formal systems (such as arts, music and sports classes or private tutoring to prepare for examinations.)" The use of "alongside" makes this definition very interesting but the stress placed on the outcomes in terms of obtaining or not formal certificates, even with caution through the use of the word "typically", makes it difficult to use in the future if non-formal learning becomes more systematically recognised one way or another as it seems to be increasingly the case. OECD (2007a) proposes: "non-formal learning arises when an individual follows a learning programme but it is not usually evaluated and does not lead to certification. However it can be structured by the learning institution and is intentional from the learner's point of view." This definition has the same drawback of stressing the absence of certification and therefore makes it difficult to continue using it if countries organise massive recognition programmes. From this point of view, the definition by Coombs *et al.* (1973) seems more appropriate because it does not mention explicitly that it does not lead to a certification "non-formal education is any organised educational activity outside the established formal system – whether operating separately or as an important feature of some broader activity – that is intended to serve identifiable learning clienteles and learning objectives." Finally, CEDEFOP (2005) adopts a rather subtle approach whereby some activities leading to learning could be planned but not in terms of learning: they would therefore be intentional but not planned from a learning point of view. In a way, the forthcoming CEDEFOP (2008) glossary contains the same kind of difficulties because of some possible overlap and, worse, some technical difficulties to

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[13] Here too, several other expressions can be found: *non-formal education*, *non-formal course* or even *non-formal education courses* (Schugurensky, 2000). None of them are used here.

decide whether some mode of learning is non-formal or something else: "non-formal learning is learning which is embedded in planned activities not explicitly designated as learning (in terms of learning objectives, learning time or learning support.) Non-formal learning is intentional from the learner's point of view." It has the merit of not mentioning the outcome(s) in terms of certificates in the definition itself but in a comment; this is a merit because it makes it sustainable even if non-formal learning is readily recognised in the future: "non-formal learning outcomes may be validated and lead to certification". It is interesting also because if non-formal learning appears intentional, it does not seem to have learning objectives…

A.1.5. Prior Learning or Acquired Skills and Competences

It is worth mentioning that several countries, regions, authors or national official documents use other terms such as *prior learning*[14] (Australia, Canada, UK, among others) or *acquired skills and/or competences* (Flemish Belgium; OECD, 1994) in a very similar fashion as others use the terms *non-formal* and *informal learning*. *Prior knowledge* is another alternative that has less currency. This term is probably barely used because when analysed closely the "prior" component does not make too much sense: it is used in the sense that knowledge has been acquired before a recognition programme, but in reality knowledge cannot be "prior", knowledge is either present or not. It could be said that it has been acquired "previously" or was acquired "a long time ago" but knowledge cannot be "prior."

Interestingly enough, the mere fact of using *prior learning* means that it has to be associated with words such as *recognition* or *accreditation*[15], because the reader will immediately have to wonder: "learning that is prior to what?" It makes sense to talk about prior learning only when referring to its recognition because it is learning that took place prior to the recognition programme the individual is planning to go through. This individual, in addition to being a *learner,* as all individuals are in this context, is mainly an *applicant* that aims at having her/his prior learning recognised regardless of where and how it was acquired. On the other hand, it may not make sense to talk about *recognition of prior learning* because among the prior learning there was necessarily, in most cases, some formal learning and this formal learning is very likely already recognised in a qualification; and it may not be cost effective to recognise the same learning twice. In addition, it has become more and more obvious that sometimes it is necessary to take into account the formal learning to assess someone's non-formal and informal learning, especially when the recognition of non-formal and informal learning allows learning pathways by way of credit transfer as an entry or re-entry into the formal education system (exemptions systems, for instance, that are quite often used in the tertiary formal sector.)

In short, and in theory, the concepts of non-formal and informal learning are a lot narrower than that of prior learning, because the latter involves any kind of prior learning, including the formal one, even if already certified. In practice, and following some recent definitions, it seems that prior learning has lost its initial broad meaning to become a quasi synonymous of *previous non-formal and informal learning*.

A.1.6. Recognition, Validation and Assessment

Van Kleef (2006) proposes that recognition in general is "the comprehension and acceptance of learning expressed through formal communication." Recognition is acknowledged by post-secondary institutions in at least three ways: first, through the granting of access to an educational programme; second, through the awarding of academic credits; and third, by allowing learners to conduct self-recognition. The forthcoming CEDEFOP (2008) glossary also proposes a general definition for *formal*

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[14] See Andersson and Harris (2006) and Van Kleef (2006) for excellent summaries and surveys of the literature.

[15] See the definition provided by Van Kleef (2006): "**Prior learning** refers to knowledge, skills, and attitudes that have been acquired outside of the sponsorship of educational institutions at any time prior to undertaking an assessment."

recognition of learning outcomes: "the process of granting official status to skills and competences either through the award of qualifications (certificates, diplomas or titles) or through the grant of equivalence, credit units or waivers, validation of gained skills and/or competences."

From a definitional point of view, *recognition* is clearly about identifying something that is already known; and in this sense, it means to accept that skills, knowledge and competences exist. It may contain a legal element as it sometimes means acknowledging or approving the legal existence of something; here again, the presence of skills, knowledge and competences. To that extent, *recognising* is very close to the notions of *admitting* or *accrediting*.

However, besides Plato[16] and some few other pioneers, the concepts of *recognition, validation* and *certification* have almost always been attached to learning in formal settings. The vocabulary therefore frequently opposed formal education and training and non-formal and informal learning that are more of a personal process. What seems to be rather new[17] is the general acceptance that recognition, validation and certification could also be associated with learning outside of formal settings. What is also new with recognition of non-formal and informal learning is that it can also take place as self recognition, in addition to usual recognition that can be granted by external observers. To that extent, it is probably more interesting to see formal (or technical) recognition as the first necessary step on the road to recognition, validation and certification of non-formal and informal learning (see below).

France is often quoted for its successive advance toward full recognition (the term used in France is *validation* however.) From the first law that appeared in 1934 to the first policies recognising and validating prior learning in 1970/71 (an outline of what became later the *Bilan de compétences[18]*) when the 1% levy was also created to promote continuing training and development, to the more recent law on VAP (*Validation des acquis professionnels*) and the 2002 law on the VAE (*Validation des acquis de l'expérience*), which states that all kinds of experiences can be validated. In the latter, the most recent law in France, applicants may get full validation and therefore be rewarded a full qualification without any additional [formal] course or training if they can demonstrate their skills, knowledge and competences to a given standard.

The notion of *accreditation* described above is sometimes used explicitly in countries such as the United Kingdom where the accepted term is *Accreditation of Prior Learning* (APL) or *Accreditation of Prior Experiential Learning* (APEL).

In addition, it is worth noting that *recognition of non-formal and informal learning* is a narrower concept than just non-formal and informal learning. The former is a rather formal process that is visible or can easily be made visible; whereas the latter encompasses what human beings do all the time and everywhere. From a statistical point of view, for example, non-formal and informal learning is very difficult to identify and in fact few convincing measures exist in this respect. As soon as individuals undertake a recognition programme, on the contrary, it is relatively easy to statistically capture the process. This is one of the main reasons why OECD countries involved in the OECD activity on recognition of non-formal and informal learning have decided to focus on recognition rather than to open up to other

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[16] Plato, in *Laws*, makes a significant reference to recognition of non formal and informal learning: "…whether they are slaves or freemen makes no difference; they acquire their knowledge of medicine by obeying and observing their masters; empirically and not according to the natural way of learning, as the manner of freemen is, who have learned scientifically themselves the art which they impart scientifically to their pupils. You are aware that there are these two classes of doctors?" (Plato, *Laws*).

[17] From 10 to 15 years ago.

[18] CEDEFOP proposes the following definition: "in collaboration with an external management consultant, an in-depth analysis by an employee of his/her motivations, skills and professional experience, with a view to reconsidering or redefining his/her future career objectives" (www.trainingvillage.gr/etv/upload/etvnews/news/2352-att1-1-report_on_career_development.pdf). Despite the usual assimilation of the *Bilan de compétence* to recognition of prior learning, it is considered here as more of a career and guidance tool.

considerations, thus avoiding being trapped in an immense field of research with few or no immediate policy implications (OECD, 2007b).

In some countries, it is said that **validation** must be distinguished from *recognition* because validation implies giving rights to individuals. Validation entitles individuals to some rights in the lifelong learning system and in the labour market (wage grids.) To that extent, the words countries are using to designate their programmes probably say a lot in terms of the kind of system they are aiming for. For validation of learning outcomes, CEDEFOP (2008) proposes: "the confirmation by a competent body that learning outcomes (knowledge, know-how, skills and/or competences) acquired by an individual in a formal, non-formal or informal setting have been assessed against predefined criteria and are compliant with the requirements of a validation standard. Validation typically leads to certification", which stresses the point that there are standards against which prior non-formal and informal learning is checked and validated (see also Charraud, 1999.)

The validation step in a non-formal and informal learning certification process typically will therefore establish a level at which the applicant performs (Charraud, 1999.) In short, validation checks the pieces of evidence brought by the applicant in support of what s/he claims s/he knows or can do, at the level at which s/he performs. Therefore, validation does not come from the Latin word *valore* (value) but from *validare* (to make stronger, to reinforce.) The validation step checks the validity, against a set of standards, of the documents and evidence provided in the recognition step.

Even if the word *recognition* may contain the idea of a legal status, it seems that in the field of recognition and validation of non-formal and informal learning, only the term *validation* has an embedded legal component. Recognition is about substantiating the existence of actual and real competences, where validation adds the checking of these competences against a set of standards.

The term **assessment**[19] is defined by Whitaker (1989) as the identification, measurement and verification of prior learning and the exercise of judgment as to whether it has the appropriate balance of theory and practice and sufficient breadth and depth to be considered the same as or reasonably comparable to the learning that institutionally educated students are expected to have. It is a term that is used in the United States and Canada, for example, but that is often embedded in the term validation and has no currency in other countries such as France. CEDEFOP (2008) even proposes a definition for assessment of learning outcomes "the process of appraising knowledge, know-how, skills and/or competences of an individual against predefined criteria (learning expectations, measurement of learning outcomes.) Assessment is typically followed by validation and certification." This definition is close to the one provided for validation, except for the term *appraisal* as opposed to *confirmation*. The assessment step is very important for understanding the institutional arrangements.

It is worth mentioning that, in Canada, the first term ever used was *Prior Learning Assessment* (PLA), at the beginning of the 90s, following up on the term used in the United States. The focus was therefore on *assessment* (what the world of education values) until a couple of years later when it became PLAR to put the focus a bit more on the methods of communicating the learning to the wider world (the labour market typically, employers mostly) and therefore on what the society at large does value. By the same token, it is interesting to note that the first OECD activity on the topic was entitled: "*Assessment and Recognition of Skills and Competences*" (OECD, 1994) as a follow up to the *Job Study*.

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[19] The term *evaluation* is sometimes used instead, but *assessment* seems to be used a lot more often in this context of dealing with what individuals have learnt before applying for having their prior learning recognised. In the literature, *assessment* generally refers to appraisal of individuals whereas *evaluation* is more frequently used to describe appraisal of education and training methods or providers (CEDEFOP, 2008.)

A.1.7. Certification and Qualification: Formal Recognition of Non-formal and Informal Learning

Certification of formal learning is rather clear and does not require further clarification. Most qualifications delivered in countries follow from learning in formal settings. Section 1 and Annex are therefore focusing on recognition of non-formal and informal learning.

At this stage, it is clear that non-formal and informal learning and recognition of non-formal and informal learning are very distinct concepts. Non-formal and informal learning were introduced to acknowledge that individuals do not learn only within formal settings. This idea is now universally accepted.

Recognition of non-formal and informal learning is less consensual – there is no general agreement for instance about the value of organising recognition programmes, about cost and about the benefits for the individual and the society – but it may have more relevance, to governments, other stakeholders, individual learners and individual applicants as a concept, than non-formal and informal learning because it makes learning visible (Bjørnåvold, 2000). It should not be confused with the concept of *informal recognition of* non-*formal and informal learning* which should be called *practical recognition* to avoid further misunderstandings: *practical recognition of non-formal and informal learning* happens all the time everywhere when employers, for instance, ascertain the knowledge, skills and competences of a worker and promote her/him outside of any formal process for assessing and validating these. Practical recognition will not be discussed here.

The natural last step in the process of *formal recognition of non-formal and informal learning*, *recognition of prior learning* or *recognition of learning outcomes* is clearly the awarding of a certification or a qualification[20] to the successful applicant; that is the person who could convince her/his assessor(s) that s/he indeed has skills, knowledge and competences that have not already been certified. Making [non-formal and informal] learning visible indeed requires that an accredited body award a qualification. To some extent, the process of recognising, validating and certifying non-formal and informal learning should be called *certifying non-formal and informal learning,* since certification is apparently the last step in this long and complex process, but this argument will be discussed later.

The certification/qualification step is organised under the authority of a competent and legitimate body and it guarantees that the recipient knows or can do what s/he says s/he knows or can do. From this point of view, the certification/qualification step is in theory exactly the same whether formal, non-formal and informal learning are concerned. However, some countries deliver different awards according to whether the individual has been through the formal system or through a recognition, validation and certification of non-formal and informal learning programmes. These awards would explicitly justify that users (employers, recruiters, etc.) make a difference between the two – and oftentimes, if not always, attribute more value to a certification/qualification coming from the formal education and training sectors – but this subject will not be addressed here.

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[20] The concepts of certification and qualification will be considered as synonymous here; meaning both the process of awarding a certificate or a qualification to the successful applicant and the final outcome (title, award, certificate, diploma, degree, etc.)

ANNEX 2 – OVERVIEW OF TERMS IN USE IN SELECTED COUNTRIES PARTICIPATING IN THE OECD ACTIVITY

A.2.1. Available Definitions in Austria, Australia, Flemish Belgium, Canada, Chile, Czech Republic, Denmark, Greece, Hungary, Ireland, Korea, Mexico, the Netherlands, Norway, Slovenia, South Africa and Spain

This annex is largely based on sections extracted from the background documentation prepared by the countries in the context of the OECD activity on recognition of non-formal and informal learning[21]; or on the references quoted therein.

In **Austria**, in relevant documents on this topic, educational researchers and policy-makers most often use the term Anerkennung *von non-formalem und informellem Lernen*. The exact translation is *recognition of non-formal and informal learning* and it has the same connotations, implications and associations as in English.

In **Australia**, the only term used is *recognition of prior learning* (RPL) and it is so well anchored in practice that it has also become a verb; phrases such as "people can be RPLed" or "RPLing people" are commonly heard. RPL is said to be an assessment process that evaluates the individual's non-formal and informal learning to determine the extent to which that individual has achieved the required learning outcomes, competency outcomes, or standards for entry to, and/or partial or total completion of, a qualification. In this sense, RPL does not refer to the awarding of advanced standing or credit in a course based on prior formal learning, and does not refer to informal 'credit' attributed by employers when evaluating current or prospective employees on the basis of experience or achievement for purposes of accessing employment or promotion.

In **Flemish Belgium**, the difference between the various concepts of *recognition and validation* and *of non-formal and informal learning* is said to be theoretically very clear but in practice, as it is often the case in many countries, it seems that many stakeholders rightly link *recognition of non-formal and informal learning* with *previously acquired skills and competences*. This is very well in line with the point made herein on several occasions that what matters is to take into account what people know and can do when it comes to the labour market or to the lifelong learning system.

Canada is a good example of a situation where the vocabulary and the concepts have evolved over time and space. The term that is currently in use is *prior learning assessment and recognition* (PLAR). Although there are exceptions (e.g. Government of Manitoba, Saskatchewan Institute for Applied Science and Technology), most adult educators and policy makers in Canada share a common view that PLAR is the identification, measurement, and recognition of knowledge, skills, and attitudes acquired outside educational institutions through work and other life experience (Van Kleef, 2006). It is most frequently used by post-secondary institutions to determine eligibility for program enrolment, and academic credit, and to assist adult learners to develop meaningful personal, educational, or career plans. Much of the work that has been done in Canada in this context has been conducted by practitioners and therefore, it has been barely reported in academic journals; with the exception of the valuable work by

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[21] All the original background reports can be consulted in full at: www.oecd.org/edu/recognition. These paragraphs have been edited due to space constraints but they are extracted almost literally from them.

Livingstone and colleagues (NALL, 2000; Luciani, 2001). An approach that has currency in Canadian academic settings is PLAR. It is based on a belief/value system that supports opportunities for individuals to have all relevant learning recognized and counted towards a qualification. It is consistent with other strategies that support diverse and inclusive pathways to lifelong learning (van Kleef, 2006.)

In **Chile**, the National System of Labour Competences Certification (NSLCC) is an essential component of the Permanent Training System and therefore has a strong impact on the definitions that are used. It is a certification system for working skills, knowledge and attitude. Even if it is explicitly said that the concepts are under analysis and discussion with different actors of the educational system and the labour sector, it seems that the different concepts remain quite distinct and largely influenced by the labour market. *Non-formal learning* is learning acquired through planned and explicit formative methods implanted in labour, training or other types of organisations, but not recognised within the regular education system; whereas *informal learning* is learning acquired in a non-planned way through job experience, self-teaching or other instances during the development of a person. The main function of the NSLCC is precisely to formally recognise the labour competences of persons, independently of the way in which they have been acquired. They can be the result of experience or of studies in formal teaching institutions. The recognition of previous learning is posed as one of the components of technical formation itineraries, understood as the formal act through which an institution validates the technical learning acquired by a person before her/his insertion into a technical formation programme. This will permit to correctly assign them to the modules they belong to.

In the **Czech Republic**, the Act of March 2006 uses the term *Ověřování a Uznávání Výsledků Dalšího Vzdělávání* which means v*erification and recognition of further education results*. The term "further education" means educational activities that are not considered to be "initial education." However, the Czech Act, and its sub-components, specifies with great details when verification and recognition of further education results may happen. Therefore the term and concept do not overlap with *recognition of non-formal and informal learning*; the latter being too broad in the Czech context where special attention is given to competences acquired in the workplace.

In **Denmark**, when the debate on competence development started in Scandinavia, the term used was *Reelle Kompetencer*; which means *genuine, or actual, competences*[22]. The term used nowadays is *Realkompetence* which comes from Norway. It is an overall designation for everything a person is capable of knowing and doing in any given situation, no matter how those competences have been acquired. It explicitly includes formal learning for instance. For that reason, the generally accepted, non-literal translation in English is "prior learning." It refers to all forms of learning outcomes whether acquired in formal education systems or as non-formal or informal learning: in the workplace, in liberal adult education or in private life. This presence of the notions of knowledge, skills and competences makes the Danish approach very close to the Flemish Belgium one, for instance.

The **Greek** translation of the term *recognition of non-formal and informal learning* is *Αναγνώριση μη- τυπικής και άτυπης μάθησης*. The term is derived from EU policy documents and statements and has been adopted by the relevant Parliament Acts in 2005, which refer to the systemisation of lifelong learning processes. The term refers to the recognition of learning outcomes so that a link between formal, informal and non-formal learning becomes feasible. Furthermore, the term denotes the recognition of skills and qualifications and includes a credit unit transfer system between learning programs. An additional consequence of the term is that it can lead to the consolidation of professional rights.

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[22] See also Friberg (2007) for a summary of terminology in all the European Nordic Countries.

In **Hungary**, the first term used by a narrow group of professionals in the second half of the 1990s was *Előzetes Tudás Értékelése*, a literal translation of the English term *prior learning assessment*. Interestingly enough, in Hungarian, there is almost no distinction between the words learning and knowledge; the word *tudás* is used for both. In the late 1990s, one of the Hungarian regional training centres launched an experiment with the help of a Canadian expert. This experiment consisted in introducing in the centre's website a menu item that offers two concepts and their definitions. These definitions correspond to prior learning assessment (PLA), in English; and ETFE, in Hungarian, the latter standing for *prior learning assessment and recognition*. The experiment concluded that the Hungarian term is not known or used outside this particular institution (www.szrmkk.hu). The term *recognition of prior knowledge/learning* is often used alternatively. Since the beginning of the year 2000 and the publication of relevant documents by the European Commission, the term *recognition of non-formal and informal learning* has increasingly been used. However, there is definitely no Hungarian acronym widely accepted or used. Professionals often talk about "informal knowledge", which is regarded by Hungarian experts as a misconception since "informal" indicates the means of acquisition –knowledge itself is in no way different from knowledge acquired by other means. As often, a law was introduced to standardise the terms: the 2001 Act on Adult Education and Training provides for *assessment of knowledge* (i.e. assessable prior knowledge that is in conformity with the training programme.) Instead of *recognition,* it speaks about set-off, meaning, in the narrower sense, that the training institution takes into consideration, one way or another, the individual's prior knowledge and experience when implementing the training programme. However, this is not done according to uniform regulations. In practice, the main problem is that training is not organised for individuals but rather for groups, and therefore the provider should "take into consideration" the highly diverse prior knowledge acquired by the group. The distinction "individual vs. the group" is crucial, here however, it has not been acknowledged enough that recognition of non-formal and informal learning requires a more individualised process than that involved in recognising formal learning or even than that of assessment of formal learning outcomes, which are often organised for groups of students through written tests and/or quite well regulated standard procedures.

In **Ireland**, the terminology used in connection with the recognition of non-formal and informal learning has evolved over time and according to different levels of practice. The work to develop national principles and guidelines for the *recognition of prior learning* (RPL) (2005) included developing a common working definition of RPL as a means to promote common understandings and usages. This definition includes formal, non-formal and informal learning. The definition took account of existing usage and practice at national and European Union levels. The following definition of RPL was agreed upon: "Recognition is a process by which prior learning is given a value. It is a means by which prior learning is formally identified, assessed and acknowledged. This makes it possible for an individual to build on learning achieved and be formally rewarded for it. The term 'prior learning' is learning that has taken place, but not necessarily been assessed or measured, prior to entering a programme or seeking an award. Prior learning may have been acquired through formal, non-formal, or informal routes." This definition emphasises prior learning and conceptualises RPL as a process of distinct stages. The term RPL encompasses other definitions which may be used in local settings e.g. Accreditation of Prior Learning (APL); Accreditation of Prior Experiential Learning (APEL); Accreditation of Prior Certificated Learning (APCL); Recognition of Prior Learning (RPL); Accreditation of Prior Learning and Achievement (APL&A); Recognition of Current Competencies (RCC); and Learning Outside Formal Teaching (LOFT). The terms APL and APEL remain in use in universities, providers and in some workplace contexts. However, a common understanding of the term RPL and the concept is emerging. The definition of RPL should be understood in relation to the National Framework of Qualifications and the purposes of RPL. The purposes of RPL are set out in the Authority's Policies, Actions and Procedures for Access, Transfer and Progression (October 2003) (www.nfq.ie/nfq/en/documents/atp.pdf) as being: entry to a programme leading to an award; credit towards an award or exemption from some programme requirements; and eligibility for a full award.

In **Korea**, the legal system regulates the contents of lifelong learning; which in turn provide the legal background for dealing with non-formal and informal learning. According to Article 31 of the Constitution of the Republic of Korea, the government is responsible for promoting lifelong learning and setting up legal provisions in this area. Article 10 of the Education Act, which provides the basis for all educational policies in Korea, stipulates the contents related to promoting lifelong learning for the people. The Lifelong Education Act also stipulates all provisions related to promoting lifelong learning. With regard to the laws directly linked to recognition of non-formal and informal learning, the Act on the Acquisition of Academic Degrees through Self-Education was implemented in 1990. It provides a legal foundation on which the System of Academic Degrees Acquisition through Self-Education (Dok-Hack-Sa) was based. In addition, an Academic Credit Bank System (ACBS) has been implemented, based on the Act on Recognition of Credits, for those who have not taken formal learning but want to obtain academic credits and degrees by completing programmes and course-work at diverse types of lifelong learning agencies. Currently, two public organisations are involved in the operation of the System of Academic Degrees Acquisition through Self-Education (Dok-Hack-Sa) and the Academic Credit Bank System, respectively. The Korean National Open University is commissioned to manage the Bachelors' Degree Examination Department, which is in charge of operating the System of Academic Degrees Acquisition through Self-Education (Dok-Hack-Sa); and the Korean Educational Development Institute (KEDI) is commissioned to manage the Academic Credit Bank System.

In **Mexico**, depending on the type of recognition, several terms are officially used as well as the term *recognition* and *non-formal and informal learning*. In the adult learning sector, the term used is *Acreditación y certificación de competencias y conocimientos previos* (accreditation and certification of previous competences and knowledge). In the context of recognition of non formal and informal learning at the upper secondary level (*Bachillerato*), the term is rather *Acreditación y certificación de conocimientos correspondientes a niveles educativos o grados escolares adquiridos en forma autodidacta o a través de la experiencia laboral* (accreditation and certification of knowledge corresponding to an educational level or school grade acquired in a self-taught manner or by way of labour experience.) Finally, when it comes to experience from the labour market, the term is *Certificación de la competencia laboral conforme a NTCL, independientemente de la forma en que se hayan adquirido los conocimientos, habilidades y destrezas implicados en dichas NTCL* (certification of labour competence according to NTCLs, regardless of the way knowledge, abilities and skills involved in those NTCLs have been acquired.)

In the **Netherlands** the term *Erkennen van verworven competenties* (EVC) is used as a literal translation of the English term *recognising acquired competencies*. *Erkennen* means awarding a professional qualification (civil effect) for competencies on the basis of an independent judgement. *Verworven* refers to all the competencies an individual has acquired, not taking into account the form and the place of learning. *Competenties* refers to the capacities of people that can be developed so that the individual can act accordingly in situations that require them in an adequate, effective, motivated, and process and result oriented manner. A few years ago, people generally used the term *Elders Verworven Competenties* that, literally translated, means: "elsewhere acquired qualifications." The change in the terminology can be connected the idea that the new term EVC better describes the total concept that involves recognising abilities, regardless of how or where they were acquired. EVC is aimed at recognising, validating and further developing all what an individual has learnt in all kinds of learning environments, in formal settings like school but also in non-formal or informal ones like the workplace or at home. In short EVC refers to building on the competencies a person has already acquired. EVC is to be considered at the same time a concept and an instrument. This means that, in the strict (or summative) sense of the term, EVC is concentrated on the recognition and validation of all what an applicant has learnt. When this validation is taking place upon the basis of a recognised standard, such as the MBO qualification standard, this will provide the candidate with a certificate or a diploma. In a broader (or formative) sense of the term, EVC comprises also the stimulation of the real learning or knowledge

development. The broader approach is directed to the development of the individual participant. This development appears to be in practice of great value to organisations. In this sense, EVC can be seen as an important instrument for career development. Looking at the way EVC is carried out in a wide variety of projects, it is possible to conclude that several names are used for EVC procedures and also that the elements of the procedures are diverse.

The closest **Norwegian** term for recognition of non-formal and informal learning is probably Dokumentasjon og Verdsetting av Realkompetanse, which translates into English as documentation and validation of formal, non-formal and informal competences. As in the Danish case described earlier, the Norwegian concept of realkompetanse refers to all formal, non-formal and informal learning. In practice, this means the sum of all the skills and knowledge individuals have acquired through the education system, paid and unpaid work, organisational activities, family life and life in society. The Norwegian approach has built on the idea that documentation and validation methods must have value for users in different areas: participation in working life, carrying on a profession or trade, participation in the education system (admission and/or shortening of education) and participation in voluntary activities.

In **Slovenia**, the Memorandum on Lifelong Learning (2000) sets the standard for terminology; also, the last amended National Vocational Qualifications Act (2006) uses a well-established term a*ssessment of non-formal (Neformalno) and informal (Priložnostno) learning (Učenje)* to designate learning achievements falling outside the scope of the formal education system. The term *non-formal learning* is rarely used to denote non-formal education, and the term *opportunistic learning (Aformalno Učenje)* is on rare occasions used to describe *a-formal learning*. The term *non-formal learning* evokes the same substantive associations as the original English term, but contrary to the English term for *informal learning*, it is to a large extent associated with randomised, mutually unrelated, leisure and voluntary forms of learning. In Slovenia, two fundamental types of qualifications are distinguished. First, the broad based qualifications defined by the level of education and content of a vocational qualification, and the type of general, professional and vocational knowledge, skills and competences. Second, more narrowly defined qualifications based on the content of a vocational qualification, and the type of general and professional knowledge, skills and competences. The latter is for the adult population and is called *National Vocational Qualification* (NVQ) and only this one can be obtained through recognition of non-formal and informal learning. In fact, the two systems are rather separate since young people have the possibility of obtaining qualifications primarily through a traditional school education system (responsibility of the Ministry of Education); whereas adults can acquire (vocational) qualifications through the certification system of NVQ for occupations not included in a formal education programme (responsibility of the Ministry of Labour), or can take the exam at the Chamber of Craft or the Chamber of Commerce and Industry of Slovenia.

In **South Africa**, the term used for the recognition of non-formal and informal learning is *recognition of prior learning* (RPL). It acknowledges that learning occurs in all kinds of situations – formally, informally and non-formally. To protect the integrity of the process, measurement of learning takes place against specific learning outcomes required for a specific qualification and in principle, if successful, a learner could be awarded credits for such learning if it meets the requirements of the qualification. RPL is very explicitly linked to qualifications and the achievement of credits towards such qualifications. In theory, and in accordance with the requirements for qualifications to be registered on the South-African National Qualifications Framework (SANQF), all qualifications could be achieved through RPL. However, two 'types' of RPL have emerged over the past few years: *RPL for credit* and *RPL for access*. The first one is usually associated with general and further education and training, and mostly for competence-based training, against unit standards. The second is usually associated with higher education. These two types of RPLs, in turn, are associated with very different approaches to RPL: a *credit-exchange* approach, a *developmental* approach, *radical RPL* and *Trojan horse RPL*. The remaining of this section on South Africa borrows from Heyns (2004, p. 30-35). It is reproduced almost entirely as it provides an interesting case for discussion of the different meanings of the main terms and concepts.

In **South Africa**, the term *credit-exchange*, or competence-based model for the recognition of prior learning, was coined by Butterworth (1992, p.40) and is described as "the ability of the individual to perform certain job tasks or roles to a pre-defined standard." This type of RPL is usually closely associated with a consumer-oriented and utilitarian view of experiential learning, i.e. it looks at market-related performance as it matches or 'fits' prescribed outcomes. It has an "extrinsic, economic use-value" (Harris, 1999, p. 127.) The only experience likely to be recognised is that which agrees with a particular content of the curriculum. Luckett (1999) maintains that it is likely to be practised in the natural and applied sciences and in industrial training and workplace contexts. The critique of this approach is in terms of the lack of engagement with the nature of knowledge. RPL undertaken in this manner challenges the "site of knowledge production" but not "what counts as knowledge and who produces it" (Luckett, 1999, p. 71.) This is a very common view of RPL in South Africa. The *South African Qualifications Authority* (SAQA) *RPL Policy* (2002) warns against the "purely technical application, dislocated from a particular individual and broader context" (p.12) where knowledge is decontextualised and discrete parts of a qualification are assessed.

In **South Africa**, the developmental approach was proposed by Butterworth (1992) as an improved approach to RPL. In this model, the emphasis is not on the matching of competence with pre-agreed standards where, if a successful 'fit' is established, credit is given to the learner, but rather on what the learner has learnt through the experience. Evans, (1992) maintains in this regard that "the insistence throughout must be that the experience of a student is significant only as a source of learning. The intellectual task of moving from a description of experience to an identification of the learning derived from that experience is demanding. But if it cannot be accomplished, there is no learning to assess, however important to the individual that experience may have been (p. 7)." Harris (1999) suggests that as in the case of the credit-exchange model, the nature of knowledge is not challenged. At most, the developmental model is "a translation device, a one-way bridge-building process" (p. 130) between different knowledge forms – that of experience, and that of "canonical bodies of knowledge" (p. 130) so prevalent in higher education. Therefore, the articulation of 'equivalences' between experiential and formal learning is highly contested unless the experiential learning fits into the hierarchical disciplinary knowledge. In addition, yet again, RPL assessment is on discrete parts of the curriculum and the curriculum per se, and the knowledge underpinning the curriculum is not challenged. Therefore, the two most prominent models for the assessment and recognition of prior learning seem to be most likely to empower the already empowered; i.e. those learners who have had sufficient exposure to discipline-based learning, in addition to experience, to engage with a RPL process. Harris (1999) describes this situation as follows "prior learning is valued largely in terms of its similarity to pre-existing conceptions of 'desirable' knowledge and skill…. The gatekeepers have widened the gates slightly in terms of greater flexibility regarding the site of knowledge production but care is taken not to let any actual 'outsider knowledge' slip through unnoticed (p. 132)." Osman and Castle (SAARDE Conference University of the Free State, 2001a), maintains that the developmental model prevails in higher education precisely "because it represents a pragmatic and systematic approach to the 'portability' of prior learning…it does not threaten institutional autonomy, standards, or existing ways of organising curricula" (p.3). Therefore, candidates for prior learning recognition may find themselves in a situation where their informal learning is often viewed as irrelevant and inappropriate to formal learning situations. The range of 'acceptable' prior learning is limited to those aspects that fall within the codes and prescriptions of institutions which limitation serves to maintain the status quo in pedagogy and curricula.

In **South Africa**, the *radical RPL* (Harris, 1999, p. 133) is closely linked to "societal transformation, liberation and redress" (p. 133) for the common good of the collective. This approach found strong support in the pre-1994 election period in South Africa. However, where the collective rather than the individual becomes the focus, Harris (1999) warns that radical practices have the tendency to "exclude diversity, obscure difference and silence the voices of those falling outside the dominant (albeit alternative ['radical']) grouping" (p. 134), thereby resulting in an almost reversed 'racism', in which only

the experience of the emancipated group, counts as knowledge. Luckett (1999) refers to this kind of RPL as "the critical paradigm" (p. 72), where knowledge is understood to be "politically interested as well as socially constructed" (p.72.) The assumptions about the nature of knowledge and the curriculum are challenged, particularly from an emancipatory point of view; i.e. the "experience, especially that of oppressed classes and groups would be viewed as authentic" (p.72.) However, both Harris and Luckett agree that *emancipatory RPL*, from the point of view that learning from experience can "lead to social and political transformation", has all too often "not been realised" (Harris, 1999, p. 134.) Harris's (1999) final proposition for a RPL model is called the *Trojan-horse* approach (p. 134).

In **South Africa**, the *Trojan-horse* (p. 134) approach calls for "an enquiry into the social construction of knowledge and curricula" (p. 135) in ways in which both experiential knowledge and discipline-based knowledge move closer to (and complement) each other. A two-way bridge needs to be constructed whereby practice-based learning and discipline-based learning feature equally strongly, in far more flexible ways than in traditional curricula, through a "mutual engagement and critique, a new shared language for understanding knowledge and modes of meaning" (p. 135.) Osman and Castle (2001a) maintain that university educators "accept that experiential knowledge is distinct from academic ways of knowing, and that learning that occurs in a variety of contexts is not always transferable, but. … that they may be interdependent rather than exclusive" (p. 4.) Such an approach makes it possible to determine knowledge equivalence, whereby 'general credit', rather than specific, discipline-based credit, is awarded (Harris, 1999.) *The South African Institute for Distance Education (SAIDE) Teacher Education Team*, (2002) describes this model as "transformational" (p. 6) and an approach whereby RPL seeks to "recognise non-formal and experiential learning for itself rather than attempting to articulate and match such knowledge and learning with knowledge prevalent in the receiving institution" (p.6). Therefore, the debates seem to indicate that "knowledge is [not] universal, externalised, decontextualised and value-free" (Harris, 1999, p.126.) Traditional ways of viewing experiential learning as "neutral and available to rationality", i.e. to transform experience into a one-on-one relationship to the types of knowledge required in discipline-based learning, are not possible or not even the correct position to take. Harris maintains that experiential learning is "partial, socially constructed and highly contextualised" (Harris, 1999, p. 126). The *Trojan-horse* approach therefore poses challenges to "the way we teach, what we teach, when we teach, and what we think is worth teaching" (Osman and Castle, 2001a, p.3) and furthermore, challenges the validity of curricula in general. Luckett (1999) suggests "we should not attempt, via RPL, to strip learners of their particular identities and turn them into "universal knowers" (p. 73) who are capable of "true self knowledge" (p.73); we should rather assist with "the negotiation of two worlds – the world of experience and the world of the academia" (Osman and Castle, 2001a, p.2.)

In **Spain**, there seems to be a rich terminology. Several autonomous communities (Baleares, Catalonia, Basque Country, for example) have already elaborated specific glossaries of terms related to recognition and validation of non-formal and informal learning. They are published to be used by their respective validation and qualification institutes. Some studies and researches on recognition of experiential learning (EOI, Business School: 2004) have also compiled and offer lists of basic terms and concepts for the benefit of both researchers and readers, including a large number of international terminology not always applicable to the actual situation in Spain. INCUAL (2005) includes a glossary defining many technical terms, to simplify its working methodology during the elaboration of the Qualifications Catalogue. The meaning of all these terms is not always identical for all communities, as it was to be expected since Spain is just in the process of building and discussing different components of the procedures for the recognition and validation of non-formal and informal learning. As a consequence, there are few terms that are clearly defined and that have broad acceptance at the national level; and Spain borrows from the CEDEFOP glossary (2003) when it comes to defining informal learning, non-formal learning, recognition of competences, formal recognition, social recognition and recognition of previous learning.

A.2.2. An Attempt at Drawing Conclusions

This list of countries for which rather precise definitions are provided is inevitably incomplete. Nevertheless, together with an extensive usage of the existing literature, this section provides a good overview of what most countries, to a small or large extent, use and consider when defining the terms and concepts they want to use in their national context for designating recognition of non-formal and informal learning. In an attempt to draw some conclusions, the following summary points can be made.

Even if some words seem to appear more frequently than others – *prior learning* or *non-formal* and *informal learning* on one side, and *recognition* and *validation* on the other – there remains a huge variation of terms (RPL, APL, APEL, PLAR, RLO, RNFIL to name a few.) On the other hand, although the vocabulary is discrepant, there seems to be some high level of consistency as far as concepts are concerned; therefore, it is proposed to keep in mind that:

Non-formal and informal learning refers to knowledge, skills and competences acquired outside of the formal education and training sector. It is often called *prior learning* to stress the fact that it is everything that has been learnt until a person decides to undertake a recognition programme.

Recognition, validation and *certification* is about making knowledge, skills and competences visible. It is often called *learning outcomes* because what matters, precisely, when undertaking a recognition, validation and certification programme is what people know or can do and not how or where they have learnt it.

Interestingly enough, some of the terms used are often associated with specific countries, but not always, and some countries are using different terms at the same time (Ireland, Spain); also, many countries' practices are evolving over time and so are the terms they use as they learn from experience and international comparison (Canada: from PLA to PLAR; France from VAP to VAE.) It seems that the adoption of the international vocabulary has been an easy way out when local practice or cultural contexts and difficulties do not easily allow that an agreement be reached on the terminology. In recent years, countries have tried to use international definitions wherever applicable and politically acceptable.

Despite the fact that some countries, and in some cases regions, share the same language, they do not necessarily share the same terminology. Such is the example of Australia, Ireland and the UK on one side; Mexico, Spain and Chile on the other; also France and the province of Quebec, and so on and so forth: they all use different terms. There does not seem to exist a linguistic continuum and this creates some overlapping or subtle variations of definitions. This is also due to the fact that the field of recognition and validation of non-formal and informal learning is still a work in progress and that discussions and negotiations are on-going; in some cases, it may even seem to be all but a translation problem, or rather a conceptual issue having to do with culture (oral vs. written, trust vs. documenting, right vs. acknowledgement, etc.) and approach (full validation vs. partial validation.) Some of the solutions proposed above – about the definitions of formal, semi-formal, non-formal and informal learning – could be accepted to provide a solid basis for discussion and progress.

Some countries mention explicitly that their national qualifications framework (Czech Republic, France, Ireland, etc.) or credit transfer system (Greece) serve as a natural context in which recognition of non-formal and informal learning or similar programmes are organised. In this respect, the term recognition of learning outcomes fits very well with the concept of qualifications framework since learning outcomes are at its core.

As far as the content of recognition programmes are concerned, some countries tend to have a very broad approach where virtually everything can be accepted for recognition (France) while some others adopt a narrower approach (Korea).

The main conclusion remains that this area is still a work in progress which is why a lot of countries and international organisations are now placing a lot of emphasis on recognition of non-formal and informal learning or on any kind of related programmes or systems to recognise, validate and certify what people know and can do. Concepts will evolve as to best fit the expectations of the stakeholders and the vocabulary will probably have to adapt. It is a field in constant evolution and there is no need to cast the terminology in stone. Countries and authors should decide on formulating the concepts that they need in the short run and subsequently adapt them if necessary. They may want to pay attention to wanting to be understood in international *fora* and may opt for minimising the number of terms they use to avoid confusion, but all this remains a matter of choice and may be subject to meeting the needs of research and policy. Finally, the terms and concepts may not need to be communicated to the public: researchers could choose to use jargon among themselves, since most distinctions are only useful for economic purposes. It will be, later the role of practitioners to translate them into everyday life language.

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