

Chapter 29

Lifelong Learning in OECD and Developing Countries: An Interpretation and Assessment

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Introduction

It is approximately 50 years since the concept¹ of lifelong learning (LLL) was first proposed, in its modern usage.² It has gone through considerable transformation since then but much confusion continues to permeate discussion on its meaning, policy orientations and added value compared to alternative approaches. Although the initial proposals were meant for all countries, subsequent development of the concept has occurred mainly in the context of the OECD³ countries, and questions might well be raised about its relevance for the developing⁴ countries.

As a sequel to the author's earlier work,⁵ including the chapter in the Handbook's first edition (Hasan 2001), the present chapter reinterprets the lifelong learning framework, identifies its distinguishing features from alternative approaches to education policy and assesses its relevance and implications for education policy for two aforementioned stylised groups of countries. The following section

¹The concept of lifelong learning is discussed below.

²The history of the concept goes back much farther; see Hasan (1996). See also, Papadopoulos (1994).

³The terms 'OECD countries', 'advanced industrialised countries' and 'high-income countries' will be used interchangeably, recognising the fact that there are large differences among these countries. The OECD, in fact, includes some middle-income countries in its membership.

⁴The terms 'developing countries', 'developing nations' and 'low-income countries' will be used interchangeably to denote a group of countries with some common features, without discounting the large differences that exist in their educational or income profiles.

⁵See references to the chapter, (Hasan 1996, 1999, 2004, 2010).

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reformulates the lifelong learning framework, with an analysis of the forces driving its evolution in the OECD countries. It lays out criteria for assessing the added value of the framework. The section that follows assesses the influence of the framework on education policy developments in the advanced industrialised (OECD) countries, where the framework has been officially endorsed. The next section examines the case of the developing countries, where the framework has neither been officially adopted⁶ nor widely discussed. The main conclusions are summarised in the final section of the chapter.

Interpreting the Lifelong Learning Approach

Evolution of the Concept

Modern conceptualisation of lifelong learning (initially lifelong education) has its origins in the 1960s.⁷ Even though it began with several different strands, the basic idea was that post-school education should be provided on a recurrent basis, involving alternation between work and study; and educational opportunities should be available effectively to all individuals throughout their active life. The concept was broadened and re-orientated through the initiatives of several international organisations in the 1990s.⁸ The word ‘education’ was replaced by ‘learning’, to signal an emphasis on the learner, the learning processes and outcomes, as opposed to a focus on imparting of education.⁹ The coverage was extended to all purposeful learning activity, not just for the adults, but over a truly ‘cradle to grave’ or lifelong span, and

⁶This refers to an officially adopted policy by a developing country as a guiding framework for its education policies. Developing countries have on many occasions endorsed the lifelong learning principle as part of the declarations from international organisations, such as the UNESCO. See, for example, UNESCO (1997).

⁷As a forerunner, the concept of *Education Permanente* was launched by the UNESCO conference on adult education in Montreal (1960) and in a follow-up document to that conference, *Education Permanente*, (Legrand 1965), which linked adult education to the wider educational system. The outlines of the concept were discussed at the Versailles Conference of European Ministers of Education in 1969 (G. Papadopoulos, *Education: The OECD Perspective*, 1994). The basic ideas crystallised more formally in UNESCO (*Learning to be: The Faure Report*, 1972), OECD (*Recurrent Education: A Strategy for Lifelong Learning*, 1973), and the Council of Europe (*Permanent Education*, 1978).

⁸*High Quality Education and Training for All*, Meeting of OECD Education Ministers, November, 1990, (OECD 1992); *Lifelong Learning for All*, Meeting of OECD Education Ministers, January 1996 (OECD 1996a); *The Treasure Within* (UNESCO: 1996); and European Commission (*White Paper on Education and Training: Teaching and learning – Towards the learning society*, 1995).

⁹With this shift well understood as a key feature of the lifelong learning approach, this chapter will use the two terms, learning and education, interchangeably.

learning activities in all settings (OECD 2009),¹⁰ from formal education to informal and non-formal learning, sometimes called life-wide learning, were included.

The Driving Forces: An Interpretation

The evolution of education policy and the structure of educational provision may be interpreted as an interactive process between provider (or supply side) interests and the demand side needs of the learners.¹¹ Development of the formal education system over the last century can be viewed, in the main, as a response to meet the skills requirements of both the economy (including the government sector and the educational establishment itself) and citizenship. Traditionally, provider interests have dominated in shaping the arrangements for and scale of educational provision, which were under-written by the government, and were based largely on the industrial (manufacturing) model, which limited the role of informal and non-formal learning.

Though it is still by far the dominant force, provider hold has been gradually weakened by the demographic, economic, social and technological forces operating since the Second World War, forces that have gathered greater momentum since the 1970s. With the widening use of knowledge in the production process, both higher levels and more diverse sets of skills were needed to support economic performance. Economic transformations – the increasing importance of the service economy, faster pace of job creation and destruction, shorter shelf lives of products and skills and growing international competition – generated greater diversity and adaptability of skills needed by the economy. They also generated instability of jobs, raising the demand for more frequent refreshment and upgrading of labour force skills. Rising standards of living contributed to learners demanding more quality and choice in educational provision. As the demand for learning grew, learner groups found stronger voices. As captured in the concept of human capital, the learner potentially gains in strength relative to the suppliers of education because of the greater marketability of the skills acquired. Employers as a group, in their role as demanders of skills, became more vocal for getting the skills they needed from the provider institutions, rather than undertaking to provide specialist skills themselves,

¹⁰These take three forms in the literature: *Formal learning*: the system of formal schools, colleges, universities and other formal institutions that normally contribute full-time education for children and young people; *Non-formal learning*: comprises any organised and sustained education activities that do not correspond to this definition of formal education; it can take place both within and outside educational institutions and cater to persons of all ages; and *Informal learning*: all intended learning that cannot be classified as formal or non-formal. See International Standard Classification of Education, ISCED 1997, www.oecd.org/edu/eag (OECD 2009).

¹¹The demand side includes the demand for skills and competence from different sectors of the society, from individuals as well as the government and the private sector labour market.

and hence put much greater pressure on the educational institutions to open up to changing skill demands.

The same conglomeration of forces acted to weaken the strength of provider institutions. Educational institutions that were previously in quasi-monopoly positions were threatened by new entrants to the education market. New technologies, especially the use of information and communications technology (ICT) in education, brought education closer to the learner, overcoming the difficulties caused by physical and time disjuncture and raising the importance of non-formal and informal learning. Formal educational structures were found wanting in dealing with the altered forces of demand for educational provision needed for the emerging knowledge economy. They were under pressure to open up to accommodate the diversity of learner needs. Governments strapped for funds in coping with the rising demand for education, insisted on greater efficiency and accountability from the educational establishments. Stronger international competition put pressures on higher education institutions to be more responsive to the needs of the economy, especially in the transmission of knowledge and in contributing to innovation.

The net effect of the interaction between the demand and supply side forces may be interpreted as putting pressure for continuing democratisation of education. It took the form not only of wider access but also of greater attention to the emerging learner needs and learner diversity, which meant that education in all settings needed to be considered. With universal secondary education virtually assured, there was a push for ‘massification’ of tertiary education, and demand for such education came from a more diverse group of learners than previously. But the massive expansion had at best a limited impact on changing the socio-economic profile of learners. Research was pointing out that a significant part of educational inequity was linked to socio-economic factors such as household incomes, parents’ education and occupation, and educational inequity, in turn, formed a major element of income inequality. It was evident that established approaches to educational expansion had failed to exploit education’s potential contribution to social cohesion. Hence, interest in social cohesion was an important factor in the democratisation process.

The Lifelong Learning Framework: A Re-statement

The foregoing analysis helps to re-state the lifelong learning framework. As depicted in Chart 29.1, they can be summarised in two distinctive features (centre box) flowing from its building blocks (top two boxes).

These features signal two major shifts for the orientation of education policies. The first is from an approach to education policies that are designed and implemented within the context of individual sub-sectors¹² of education (made up largely

¹²The term sub-sectors of education will be used to refer to components of the education sector such as early childhood education, pre-primary, primary, secondary, post-secondary non-tertiary, tertiary, and adult education.

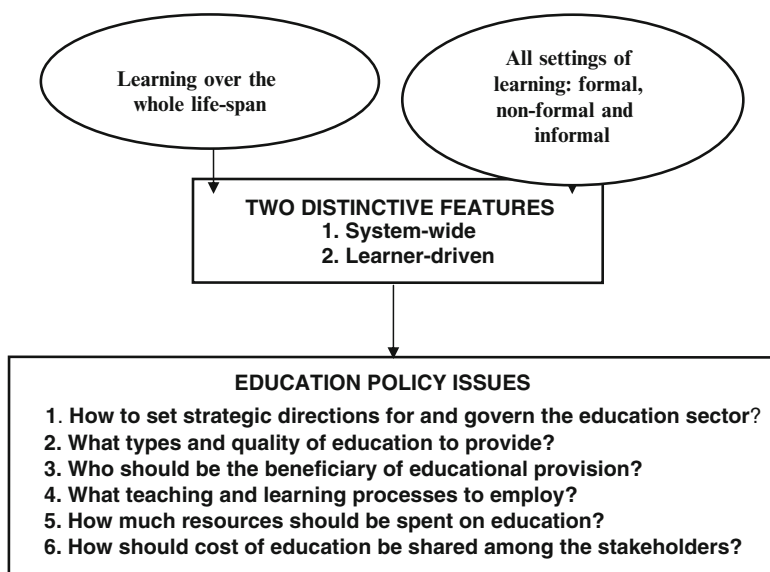


Chart 29.1 The lifelong learning approach and education policies

of the formal sectors), to a system-wide (or sector-wide)¹³ approach to education policy. This system¹⁴ comprises a lifelong – from cradle to grave – and a life-wide element – covering learning in all settings. The system-wide view defines the *scope* of education policies and argues that education issues cannot be properly understood or addressed without considering the system-wide scope of education. In contrast, existing education policy literature and practice do not offer an alternative system-wide approach; the idea of education as a system is a contribution of the lifelong learning approach.

The second shift is from the supply side dominance of educational provision to a larger role of the demand factors, from a dominant focus on provider interest to a greater recognition of the interest of the learner. Learner needs, as seen over the life cycle and in all learning settings, spell out the objective and the normative principle that underlies the framework: education policies should place learner interests and objectives as the central criterion for choosing among options concerning all education policy issues ranging from teaching and learning processes to governance of the educational enterprise. This guiding principle calls for a progressive democratisation of the learning process by giving learners a greater say in all aspects of the learning enterprise compared with the traditional provider-driven systems.

¹³The terms 'system-wide' and 'sector-wide' will be used interchangeably.

¹⁴The term 'system-wide' is used here to include all sub-sectors of education mentioned in note 12, from early childhood to adult learning, as well as the linkages between the sub-sectors through legal and technical infrastructures and practices.

Assessing the Implications for Education Policy

Assessment Criteria

The added-value of the lifelong learning (LLL) framework can be best appreciated by examining (1) whether it covers all the important education policy issues faced by a country; (2) whether it has useful guidance to offer on them and (3) how these compare against what is proposed by alternative approaches to education policy.

A Moving Target: The contribution of the LLL framework should not, however, be assessed on the basis of a one-off event – for example, whether the framework is adopted or not adopted – or as a particular change in this or that policy. The LLL approach proposes a profound change in the mindset, whose impact should be reflected in continuing changes in policy to accommodate the changing technological, social and economic contexts of education. Application of the lifelong learning approach, therefore, represents a moving target.

Basis of Comparison: Whether they do it explicitly or implicitly, and by design or default, all societies must make decisions on a number of education policy issues, such as those in Chart 29.1 (bottom box). The issues listed there are from a societal perspective; decisions at the level of individual learners or provider institutions are not of concern here. Countries may not conceptualise or address policies in these compartmentalised terms and they do recognise inter-relationships among them. For example, issues of types and volume of educational provision are not isolated from issues of equity or who benefits.

The point of spelling out these six policy areas separately is that they each need to be and are addressed by all societies in one form or another, even if the objectives and decision processes are inter-linked or opaque. These six issues will be used below to compare the lifelong approach with its alternatives. It has already been pointed out that available alternative approaches are exclusively sub-sector in their coverage and policy orientation. Hence, the lifelong learning framework has a clear advantage as the alternatives fail to address system-level issues.

However, a basis of comparison between the LLL framework and its alternatives exists at the level of education sub-sectors. For the tertiary education and adult learning sectors, the major alternative view comes from the human capital perspective where the rates of return to investment in human capital are the major decision criteria. This economic calculus is also being increasingly used in the early childhood education sector, where ideologically based views on the role and prerogatives of the parents also offer competing paradigms. For the primary and secondary school sectors, the role of the state in providing education to its citizens has been universally recognised in the OECD countries, supported largely but not exclusively on the basis of education being a public good.

Strategic Directions and Governance of the Education Sector

All countries need to set the overall priority of education against competing societal priorities, ensure coherence between education and other socio-economic policies, identify roles and responsibilities of different stakeholders in education, implement governance and management principles for a large and diverse sector, and shape the legal and other infrastructures for the sector. Given its sector-wide scope, the lifelong learning approach has a distinct advantage in offering guidance on shaping these decisions compared with the alternative approaches.

Societal Valuation of Education: A society's valuation of education derives from its vision of the role education should fill in shaping an individual's life in relation to the economy and society. In practice, such valuation has emerged out of the roles of the push and pull of stakeholder forces operating in the context of individual sub-sectors of formal education. This has led to debates about the value to be given to learning for the sake of learning versus education's instrumental service to the economy, or the role of the market in determining under- or over-education. From the lifelong learning perspective, these debates miss the point. An individual participates in learning activities for a variety of reasons ranging from satisfying the spirit of enquiry, functioning as a citizen in various roles in society, contributing to one's own and society's economic life or simply enjoying the treasures that lie within and without. These objectives evolve in their mix and relative importance over the life cycle. They each have to be accommodated in different ways, and a life-cycle approach is essential for capturing all these multiple motivations. This suggests that if a society evaluates the importance of the education enterprise in all its dimensions it would likely give it a higher value against other competing societal goals than it would under other education policy approaches.

Volume of Educational Supply: The volume of education may not be a policy target or variable as such. However, given what has just been said about societal valuation of education, lifelong learning would imply a larger notional volume of total education activities than would be the case under alternative approaches to education policy, such as those based on the rate of return calculus or on approaches that do not take account of learning in the informal and non-formal sectors.

Cohesion and Mutual Reinforcement among Education and Other Socio-Economic Policies: Given its multiple roles, education policy necessarily involves close interface with a range of socio-economic policies, such as the policies for economic development, technology, environment, culture, health and international trade, to name a partial list. The nature and significance of the interface differs among the sub-sectors of education. For example, the links between education and health policies are far more important for the early childhood education sector than they are for the sector dealing with adult learning. These differing inter-relationships can neither be properly understood nor coherence among the different policies assured from an exclusively sub-sector perspective. A system-wide perspective, offered by the

lifelong learning approach, adds value by taking account of all the important inter-linkages among different socio-economic policies.

Intra-sector Priorities and Infrastructures: Almost universally in all countries, under current arrangements, the value accorded to each sub-sector of education is determined largely by the strength of the lobby groups within each sub-sector. There are usually no mechanisms for considering relative valuation of the sub-sectors from the societal perspective. As a consequence, the education system stands composed of largely disjointed structures, cultures and impermeable hierarchies. Similarly, building of system-wide infrastructures – such as qualification structures that can link learning acquired at all levels and in all settings – falls between the stools and is ignored sub-sector determined thinking. The lifelong learning approach brings these issues to the surface.

Governance and Management of a Large and Diverse Sector: Under this rubric fall such issues as common principles and approaches to governance (overarching principles such as ‘hands-on’ governance versus ‘arms-length’ steering) and management (lower level rules of the game), the respective roles and responsibilities of the public and private sectors, standards of accountability, and so on. In addressing these issues, the guiding principles proposed by the lifelong learning framework are to keep at the very forefront learners’ interest and the expected impact on acquisition of learning as seen in a dynamic context of learning over the lifetime. The LLL approach argues for governance and management arrangements that aim to best serve learner objectives. One implication of this approach would be that policy decisions should be best taken by those closest to the learners so that learners’ views can be best taken into account. This is not to say that alternative approaches to education policy do not take learner interest into account; it is to say that the LLL approach highlights the impact on learning and puts it front and centre. The choice between different governance and management approaches are to be made with this central objective in view.

Types and Quality of Education

A country’s educational profile is often described in terms of the volume, types and quality of education being provided. The volume issue was noted above and the type and quality of education are now considered.

Types or Composition of Education Supply: The composition of education supply, such as by the level of education or by vocational and academic orientation, is an important policy variable. The guiding principle proposed by the LLL framework is that the structure or composition of educational supply should be aligned with the structure of learners’ needs, which have to be well articulated. Without its clear articulation, the composition of education supply is, by design or default, dominated by providers’ interest. Educational providers may, for example, favour a more academic

type of education; or they may invest vocational education with less status (an issue that is at the centre of the binary divide in tertiary education). Mismatches in the composition of demand for, and supply of, educational provision are a common occurrence. The lifelong learning approach suggests that close attention be paid to the composition of learner need as a way of removing such a mismatch.

Educational Quality: All educational provision has some standards of quality built into it. These standards are largely determined by providers' views of quality measures – whether input or output based. The LLL framework suggests three guiding principles to focus the quality debate. First, the impact on the learning acquired, or competence, should be the cardinal focus of quality reforms. Second, relevance in terms of the learner interest ought to be included as an element in determining educational quality. Third, quality should be viewed in dynamic, learning over time, terms. It should consider not only the learning outcome of a particular learning activity but also how well the episode prepares learners with motivation for future learning.

Who Should Be the Beneficiary of Educational Provision?

A central tenet of the LLL framework is that learning needs of all its citizens, including the disadvantaged, should be taken explicitly into consideration. Educational equity should be evaluated in the context of how the whole system functions, how it promotes or constrains distribution of educational opportunities over the life cycle. Viewing education equity issue from the sub-sector perspective is fundamentally defective; there are many elements that are left out, which can be captured only in a system-wide and life-cycle perspective. Furthermore, educational equity is not just a matter of equitable access – but requires addressing the causes behind poor educational performance. This is because educational performance at one level is a strong determinant of access to educational opportunity at the next level. This approach directs attention to a concerted action among education and other policies for addressing educational inequities. It has been well established, for example, that educational performance at the primary and secondary school levels is highly affected by the socio-economic status of the child and addressing these institutional obstacles goes well beyond education policies as such.

What Teaching and Learning Processes to Employ?

The guiding principle offered by the LLL framework is to keep the learner's interest, as opposed to suitability for the teacher or the provider, at the centre, and to concentrate on the impact on learning outcomes or the competencies acquired. The guiding principle has implications for many aspects of the teaching and learning process, such as choice of the curricula, pedagogy, teacher training approaches and

assessment of learning outcomes. The need to take account of and foster learner motivation has already been noted earlier. As another example, assessment measures should be individual-based and give primary importance to promoting learning rather than to other, albeit important, objectives such as its use as a screening tool.

How Much Resource to Invest in Education and How to Find These Resources?

The resources devoted by a country to education depend on the value the country places on education in competition with other societal goals. These are reflected in decisions regarding access, equity, quality, teaching and learning processes and governance mechanisms. As discussed earlier, the LLL framework has implications for each of these policy parameters. Taken together, they would imply a larger proportion of resources for education than what comes out on the basis of alternative, sub-sector and supply-driven approaches or the market profitability approach of investment in education. This follows from the LLL framework's wider scope of education needs, such as covering the needs for neglected years of the life cycle, and for the value it gives to greater democratisation of education as a goal in itself and as a potential contributor to social cohesion. Its concept of social benefits goes beyond the typical economic calculus of social benefits based upon a narrow view of externalities or limited to a few social sectors such as health and the labour market.

This being said, it is also important to recognise that many elements of the life-long learning agenda can be pursued without necessarily requiring additional resources. Many of the policy implications for equity, quality, governance and teaching and learning processes can be pursued through a reallocation of the existing resources. Taking teaching and learning processes as an example, teacher training programmes can be reshaped for greater learner-centred applications. As another example, ICT access policies can be shaped to give greater attention to the equity objective.

Who Should Pay for Education?

If, however, additional resources are required for a major thrust along the lifelong learning direction, where could the extra resources come from? Three options suggest themselves.

First, the LLL approach requires a careful evaluation of the relative importance of all competing societal goals. Using the sector-wide approach of lifelong learning will likely raise education's importance as seen against other social goals outside

the social sector (although it needs to be proven). If such is the case, a reallocation of resources among competing societal goals would be one source of additional allocation to the education sector.

Second, the sector-wide approach can also identify ways in which education can serve as an important element of programmes in other policy domains. For example, many countries see education as critical for enhancing productivity and international competitiveness. Similarly, education can be a key element in poverty reduction and sustainable environment strategies in poor countries. Thus, mainstreaming of education can find new resources for the education sector.

Finally, governments can do a better job of mobilising private resources, both corporate and individual, through effective use of incentives. Co-financing arrangements for promoting adult learning is a case in point. Co-operative arrangements among employers can pool resources for labour force skill development by avoiding human capital market imperfections or poaching by competing employers. Public-private sector co-operation can be effective in lifting the overall level of resources for education in many areas. In using this approach, however, it is critical that the equity objective, which is a central plank of lifelong learning, is not compromised. Governments need to ensure that they can maintain supplementary arrangements to protect and promote educational equity. For this reason, in general, the lifelong learning framework implies greater contribution by the public sector than is the case under market efficiency approaches.

Lifelong Learning and the OECD Countries

The purpose of this chapter was to explore the nature of policy guidance offered by the lifelong learning framework. It used the six policy areas identified in Chart 29.1 as a basis for demonstrating that the LLL framework does indeed offer guidance in each of these areas, and that the orientations it proposes are different from alternative approaches to education policy. At a conceptual level, therefore, the framework offers considerable additional value compared with the alternatives. Using this conceptual context, the purpose of this section, and the one that follows, is to review policy experience.

For the OECD countries, the LLL framework was officially endorsed by their Ministers of Education at their meeting in January 1996 (OECD 1996). They committed to making 'lifelong learning a reality for all' of their citizens who wanted it.¹⁵ However, what this endorsement actually prescribed was not wholly clear. While the OECD and other international organisations have made considerable efforts in

¹⁵They called for 'lifelong learning for all' and asked the Organisation to develop strategies to implement lifelong learning for all *Lifelong Learning for All, Communiqué*, Meeting of the Ministers of Education, January 1996.

giving policy content to the concept, lifelong learning remains steeped in much confusion. For the wider public it means all things to all people, often as a nice but vague slogan. Among many academics and politicians supportive of the approach, the concept remains limited to its 1970s definition, which equated it with adult learning. Even the academic journals devoted to lifelong learning carry majority of their articles with this limited interpretation of the concept.

Using the wider definition of LLL that emerged in the 1990s, Sect. 2 has reinterpreted the policy content of the framework in terms of its implications for six education policy areas, as noted in Chart 29.1. These will now be used to explore the degree to which the framework has influenced the education policies of the OECD countries.

Strategic Directions, Governance and Policy Coherence

Strategic Directions and Governance: Lifelong learning comprises a large sector, composed of many sub-sectors, both formal and informal. This large field is typically not and possibly cannot be covered under the auspices of one single ministry. In practice, there are divided ministerial oversight arrangements for formal education sub-sectors, which are often further divided between national-, regional- and local-level jurisdictions. In addition, each sub-sector has a different mix of the stakeholders, which would be difficult to accommodate within one ministry. Covering the wide spectrum of policy areas and issues as it does, lifelong learning is something of an institutional orphan: there is no well-defined institutional homeland for addressing system-wide issues. It does not have an institutional champion when it comes to speaking up for the sector as a whole in the context of other social and economic sectors.

Countries do bring together some education sub-sectors under one jurisdiction. Areas such as adult learning or literacy are often appended to one or the other ministry. Early childhood education is often linked up with ministries dealing with health and social affairs. These attempts fall far short of covering the education sector as a whole. Nor is this necessary: the LLL framework does not call for the establishment of one ministry to handle all education policies. What it does require are mechanisms and fora where sector-wide policy issues could be considered and policies co-ordinated both within the sector and in relation to other social and economic sector policies.

A review of the policy landscape in the OECD countries suggests that such mechanisms are lacking even in the case of the Nordic countries, which have been the most ardent supporters of the lifelong learning approach (OECD 2002). The policy issues identified in Chart 29.1 are mainly handled at the sub-sector level. As a consequence, many issues of interface and transitions between sub-sectors are being neglected. Despite these limitations, the system-wide approach of lifelong learning has had some impact, which is noticeable in three areas: qualifications frameworks, data development (OECD 2009) and decentralised governance.

Many OECD countries, especially the EU members, have made efforts for developing national qualifications frameworks that identify clear progressions and

learning pathways. They have also made conceptual breakthroughs in defining levels of competencies in generic terms (OECD 2004). Many countries have introduced policies for assessing prior learning, regardless of whether learning was acquired in formal or non-formal settings (OECD 2010). Some but fewer countries have attempted to link such assessments with specific qualifications and qualification requirements, thus in some limited way attempting to integrate non-formal and informal learning.

The emphasis placed by the lifelong learning approach on learning outcomes is well reflected in the field of data development. OECD countries have made significant breakthroughs in developing data on direct assessment of competencies,¹⁶ both for the school-age and adult population.

With its focus on learner interest, the LLL framework implies that education policy decisions are best taken by the education specialist working in close cooperation with the learners themselves. A decentralised approach to educational decision making is in this spirit, which is a universal trend in the OECD countries. There is, as well, a shift towards reducing direct ‘hands-on’ governance in favour of an ‘arms-length’ steering of educational institutions. This is visible in the treatment of tertiary institutions, which have been granted greater autonomy in recent years in many OECD countries (Hasan 2007).

Policy Coherence: There are continuing attempts at improving coherence among policies, for example, between the health, social and educational policies, in the early childhood phase of education, and between education and labour market policies at the levels of upper secondary, tertiary and adult education. Most countries are attempting a stronger link between the tertiary sector and innovation and economic growth policies.

Greater attention is being paid, as well, to linkages between the formal and informal sectors of education (further described below).

Types and Quality of Educational Provision

Types of Educational Supply: Taking fuller account of learner needs is a central concern of the LLL approach. In this spirit, a general trend in the OECD countries is to cater to the increased diversity of learners and learner needs. This can be

¹⁶The focus on direct measure of competencies began in 1994 with the pioneering work of International Adult Literacy Survey (IALS 1994–2000), which was followed by a second round of data gathering for adult competencies on an expanded number of competencies in ALLS (Adult Literacy and Life Skills). A modified approach was applied to the school-age population (15-year-olds under PISA) in OECD and many non-OECD countries under the PISA programme on a 3-year cycle, beginning in 2000. The Programme for International Assessment of Competencies (PIAAC) follows on the lead provided by IALS and ALLS. AHELO (Assessment of Higher Education Learning Outcomes), now being developed, aims to assess learning outcomes for the higher education sector.

observed in a range of policy reforms: from the development of a wider variety of institutional forms and delivery modes to more diversified qualifications, programmes and courses.

Increased choice at the tertiary level can be seen in greater institutional diversification and differentiation, flexibility between learning streams (academic–vocational) and greater variety in programmes and course offerings. There is a virtual explosion of post-secondary tertiary and non-tertiary institutions and qualifications (OECD 2008b). Germany has led the way with institutions that grant Master-level qualifications in vocational and technical education, and this has been followed in several countries such as Denmark, Finland, Switzerland and others.¹⁷ The UK and some other countries have removed the binary divide between the universities and the polytechnics as a way of recognising the importance of research in vocational and technical education and for improving their status. Universities are under pressure to open up to demands from the economy at regional, national and global levels and to add a third dimension ‘service to society’¹⁸ to the two missions they typically have (teaching and research). At the school level, reforms are attempting to pay more attention to student motivation, including through elimination of early streaming, greater use of experiential and cross-curricular content, experimentations with ‘production schools’, options for community service and a variety of formal and informal links with the job market (OECD 2000). In the sphere of adult learning, there is a burgeoning market of courses on employment-related skills development opportunities for the adults.

Quality: With secondary education virtually universal and a ‘massification’ of tertiary education well underway, quality of educational provision has become a major preoccupation in the OECD countries. Quality discussions and measurements have traditionally focused on input measures. The LLL framework, on the other hand, emphasises the output aspect, the impact on learning outcomes. It also adds relevance to learner needs and learner motivation as important considerations in quality. The progress OECD countries have made in developing competence-based measures of educational output has been noted above, as have been attempts to respond to the greater diversity of learners and learner needs.

Access and Equity

Access: According to a stocktaking exercise performed in 2001, the overall picture for the OECD countries is that lifelong learning is not ‘a reality for all’

¹⁷See OECD’s reviews of national education policies for these countries.

¹⁸See, for example, the 2003 University Act of Denmark, *Reviews of National Policies for Education in Denmark*, (OECD 2005d). This mission might be interpreted as a return to the role universities originally played in society. In the current context it refers to universities’ responsibility to cater to the adult population, to contribute to the public debate on critical issues confronting society and, above all, to contribute to innovation and economic competitive advantage of the country. This call is meant to counter the ‘ivory tower’ tendencies of the universities.

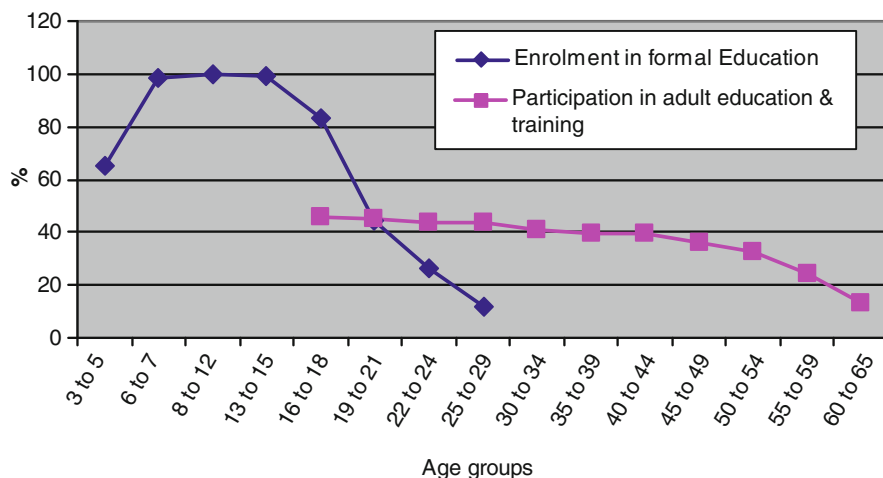


Chart 29.2 Enrolment in formal education and participation in adult education and training, Country mean, 1998 (Source: Data from *Education Policy Analysis 2001a*, OECD, page 144)

(OECD 2001b, Chap. 2). As shown in Chart 29.2, participation in educational activities in early childhood and late adult life is weak. Studies show large unmet demand in these areas. There are, of course, considerable variations among countries around these averages (OECD 2008a). In general, four groups of countries were distinguished in terms of the overall provision of lifelong learning: the Nordic countries perform at the top of the league, followed by a second group of countries comprising Canada, the Czech Republic, Germany, the Netherlands and New Zealand. In the third, and still weaker, group fall countries like Australia, Switzerland, the UK and the USA. The weakest group is made up of countries such as Ireland, Hungary, Portugal and Poland (OECD 2001b, Chap. 2).

Progress has been made in access to educational opportunities since the aforementioned stocktaking exercise; and this is also reflected in the percent of GDP devoted to education over preceding decade (OECD 2005b). The expansion of education finds its most obvious expression in the expansion of tertiary education, such that as much as 90% of the relevant cohort is now entering tertiary education in many OECD countries (OECD 2008b, Vol. 1). Expansion has also taken place in early childhood education (OECD 2006) and adult learning (Statistics Canada and OECD 2005) opportunities. Nonetheless, there remain significant degrees of unmet demand, especially in early and adult years of life. On average, 65% of children 4 years or younger participate in some form of formal provision of early childhood education (OECD 2006). Only about 5% of adults in the range of 30–39 years are enrolled in full or part-time in formal education, and around 18% of all adults (25–64 years) participate in some form of job-related non-formal education and training (OECD 2005c).

Equity: Despite impressive improvement in access to tertiary education, the record on ensuring equitable access to educational opportunities has been unsatisfactory (OECD 2008b). Research is documenting the importance of contextual and institutional

forces in determining equity of access as they play out over the life cycle. More than two-thirds of school level performance is attributed to the socio-economic background of the student, and performance at school level is a key determinant of access to future learning opportunities, including to adult learning. Countries are becoming aware of the usefulness of the lifelong learning optic on equity, which suggests that educational inequities are best addressed at a system-level and through a concerted effort involving several socio-economic policies.

Teaching and Learning Processes

Concerned with poor performance, student disinterest and high dropout rates, reforms in many OECD countries are focusing attention on improving learner motivation. Curricula, pedagogy, learning environment such as the appropriate use of ICT and approaches to assessment are being rethought. A large range of experiments are being tried, too long a list to be cited here. Experiments have introduced more experiential forms of learning, even ‘production schools’, and service to community as part of the curriculum. These attempts are in the direction proposed by the LLL approach but the developments so far have been limited. In regard to recognition of non-formal learning, a small example that may be mentioned concerns granting of certain secondary-level qualifications in part on the basis of work experience in a field. Even at the highest level, regulations have emerged in many nations where a Ph.D. by publication or demonstration is a standard practice.¹⁹

Investment in Education

The level of investment in education depends on the value society places on education, which in turns depends on how the society views the role of education. As noted earlier, the LLL approach to education would suggest a larger investment of societal resources for education than would be the case under the currently used alternative approaches to education policy. This follows from three elements of the framework: recognition of the full range of educational needs, putting a higher premium on equity in educational opportunities, especially meeting the needs of the disadvantaged, and more demanding standards for educational quality.

There is no doubt that education has become a higher priority in many OECD countries over the last decade, as is reflected in a higher proportion of GDP being devoted to education. This increase in priority stems largely from the perception

¹⁹In such cases a past body of work can be assembled for examination with an accompanying text that provides evidence of a research methodology designed for practice-based research.

that education can contribute to higher rates of economic growth. This explains why most expansion of investment has been at the tertiary level, especially in funding research and R&D. Increases in investment have also occurred in the early childhood education sector, thanks to the research that has shown positive economic returns, but the increase has been modest. For adult learning the increase has been marginal still. Addressing the deficiencies in access to early childhood education and adult learning opportunities would, itself, involve significant additional educational investment in many countries. Further additional investment would be required if functional standards required of adults are set higher. For example, according to some calculations, as much as 2% of GDP would be required if all adults were to be brought up to the level of skills required to function effectively in society, as opposed to the 1 ¼% that is currently being spent in the high-income countries.²⁰ Applying the more stringent quality proposals of the LLL framework would require still more resources.

Paying for Education

The issue in question here is the relative roles of the public and the private sector. The economic argument for investment in human capital does recognise the role of state but these are basically when the public good nature of provision is established, when the market either does not exist or works with serious imperfections. In comparison, the LLL framework suggests a higher share for the public sector in view of the larger emphasis it places on equity considerations and the role of education in supporting other social objectives. Its emphasis on public sector role in addressing the equity objective is well justified: research has shown that in the areas of early childhood education and adult learning, the equity objectives are better served with a larger role for the public sector.²¹ In the tertiary sector, despite its large growth, there has been little improvement in access of students from the disadvantaged backgrounds (OECD 2007, 2008b).

In practice, the public sector responsibility for providing primary and secondary education is firmly accepted in the OECD countries on the ground of such education being in the nature of a public good. The debate turns primarily on the public role for other types of educational provision: early childhood education, post-secondary education and adult learning. While individual country circumstances with respect to public–private share of responsibility in the three sectors differ significantly, there is a general trend in favour of increasing private sector role. This is most evident in the tertiary education sector. While charging student fees for tertiary education is unthinkable in countries with social democratic tradition, such as the

²⁰*Lifelong Learning for All*, OECD, Chap. 6.

²¹For the early childhood education sector, see OECD (2006). For the adult learning sector, see *Global Report on Adult Learning*, UIL, UNESCO (2009).

Nordic countries, other countries have moved to introduce or raise fees, such as Australia and the UK. The argument is that those who benefit from such education should also contribute a proportionate share. To make the equity argument palatable, better access to student loan arrangements, including loan repayment contingent on income, has been introduced in several countries. In the adult education sector, private sector contribution dominates the public sector by far. Some countries are experimenting with co-financing arrangements for the employed labour force, with contributions coming from the employers, employees and government. In early childhood education, public share dominates in some countries but not in the majority of the countries. Over the last decade there is modest growth of investment in the sector but no general trend of a shift in the weight of public–private shares.

The foregoing suggests that the lifelong learning approach has had a limited impact on education policy development in the OECD countries. One of the main reasons is the power of the entrenched paradigms. Each of the education sub-sectors appears to be working under a dominant paradigm. For post-secondary education it is an instrumental view of learning as a contributor to skills for the labour force, innovation, competitive advantage and economic growth (Papadopoulos 1994). For the primary and secondary school sectors, government budgetary constraints have placed cost efficiency and performance as the main driving forces for policy choices. The sector is resistant to changes requiring adaptation on the part of teachers (OECD 2005a). The tertiary sector has shown considerable dynamism in addressing the diversity of learner needs but has made limited progress in catering to adult learners. In the early childhood education area there is strong resistance in many countries to publicly supported organised provision because it is seen as an intrusion of state in parental prerogatives.

Lifelong Learning and the Developing Countries

The lifelong learning approach has been routinely invoked by UNESCO and other international organisations for dealing with education issues in the developing countries (World Bank 2002). UNESCO's Institute for Lifelong Learning has promoted adult learning through its conferences and activities within the framework of lifelong learning.²² The Dakar Declaration (UNESCO 2000) included both early childhood and adult education as part of the UNESCO's Education for All Programme (EFA UNESCO 2008); the OECD's Development Assistance Committee has pushed for

²²In a long series of conferences every 10–12 years since 1960 has promoted adult learning. The CONFINTEA V (1997) conference framed adult learning within the lifelong learning context. See also *Global Report on Adult Learning*, COFINTEA VI Conference, UIL/UNESCO (2009).

a ‘sector-wide’ approach (SWAp) (OECD 2005e; see also Ryland and Schmidt 2000) as a condition for receiving assistance; and the World Bank endorsed the concept of lifelong learning (World Bank 2002). Despite these endorsements, there is ample ground to conclude that the international organisations have not wholeheartedly incorporated the implications of the lifelong learning approach in their development assistance policy. In particular, the World Bank’s approach to education sector assistance does not correspond to its support of the lifelong learning approach. Among the decision makers in the low-income countries, the lifelong learning approach is not widely known and it has been of marginal significance in guiding education policy (UNESCO 2009).

It could well be argued that the forces pushing for lifelong learning in the high-income countries are not present in the developing countries and the approach, therefore, has less relevance for them. The contrary is argued here: the lifelong learning approach is more, not less, relevant for the developing nations: the dysfunctional nature of the education in the developing countries requires a systemic approach for developing a more functional education system, which is more responsive to the needs of learners and the wider society.

Three Features of a Dysfunctional System

While many developing nations have reached universal primary education, educational attainment of the population is, unsurprisingly, very much lower compared with the high-income countries (Chart 29.3). What is surprising is that the value

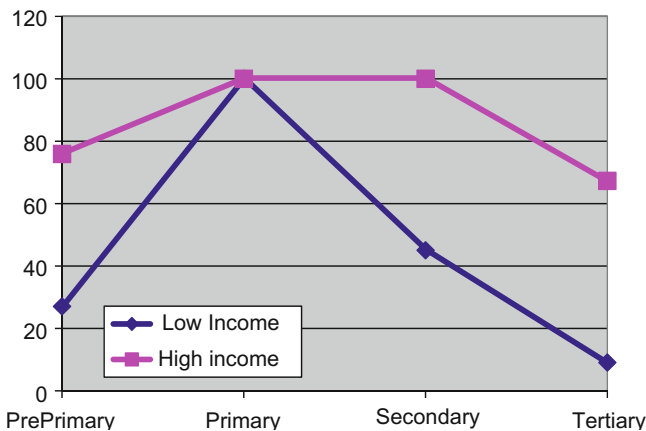


Chart 29.3 Government enrolment ratio, 2005 (Source: World Development Indicators 2007, World Bank 2007; (figures = % of relevant age group))

accorded to education, as reflected in the percent of GDP spent on education, is lower in the low-income countries: While the OECD countries spend, on average, around 5½% of their GDP on education, the figure is more like 4½% for the developing countries. Abstracting from the enormous variation across the developing countries, three contextual features of the education scene argue strongly that the lifelong learning approach can play a potentially powerful role.

Small Formal Sector with Major Gaps and Dualistic Features: The two weakest sectors in the lifelong learning profile for the OECD countries – early childhood education and adult learning – are even weaker in the case of developing countries. The formal sectors contain a high degree of duality: some high-quality provision, often in the private sector, is available for a small elite minority, and poor-quality provision (especially in the public sector) for the majority of learners.

Large and Invisible Informal Sector: Much of the non-industrial labour force acquires skills in non-formal settings through apprenticeship arrangements (mostly unpaid) and other traditional methods of skill transfers. This is not only the case in the traditional agricultural sector but also in the newly emerging service sectors. Provision of educational opportunities for the adult population for vocational qualifications or for the upgrading of skills obtained in the informal sector is very limited.

Serious Disconnect with the Economy and Society: The most striking feature of developing country educational set up is the overwhelming domination of provider interest and weak attention to learner needs, whether these relate to the labour market or to effective functioning in society. For example, there is heavy emphasis on academic and theoretical learning, both at the secondary- and tertiary-level education, with limited relationship to practical application. Tertiary education, in particular, is structured to producing academic skills without much regard to the skills needed in the labour market. Learner needs in early years of life, or in adult years are, to a large extent, ignored. The methods of teaching and learning in use treat students mostly as passive recipients rather than as active participants. The notion of quality in education does not include relevance to learner needs as an element. In general, the neglect of the demand side of the learning equation reflects the weak forces of democratisation in society. It also accounts for the dualistic features of education.

The Development Context

The Growth Fixation: To the extent that a conscious approach can be said to have existed, for much of the 1960s to the 1990s, education policy in developing countries was shaped by a preoccupation with economic development. The conceptualisation of economic development, in turn, was heavily influenced by the international development assistance community, which saw economic development in the

narrow terms of economic growth, specifically growth in per capita incomes. For much of the 1970s and 1990s, the World Bank and the International Monetary Fund supported the influential Structural Adjustment Policy (SAP) approach to international assistance. It proposed policies based on the idea that economic growth was best promoted through freely functioning markets and with least intervention from the government. The role of education, including the newly found concept of human capital, was defined in instrumental terms of the contribution it could make to economic growth, which was measured by the rates of return to such investment. The role of government in education, in this view, was limited largely to situations where the markets either failed or performed sub-optimally. The question of quality of growth, for example, in promoting egalitarian distribution of income, was not an issue for SAP, nor was education's role in social development relevant.

A Broader Conception of Economic Development: Prompted by the failure of SAP to take account of the quality of growth (Ishikawa 1994), a number of concepts were developed to capture broader aspects of the development process. The capability development approach saw development as a process of expanding substantive freedoms individuals enjoy in society (Sen 1999). Expanded freedoms, according to this view, expand human capability to perform effectively in all walks of life. Since educational capability is central to many other freedoms, it has especially important role to play in the development process. This broader view of economic development was embraced by the World Bank in its Poverty Reduction Strategy (PRS) and by the UNDP in its focus on human development,²³ in which education was a major component.

Relevance of the Lifelong Learning Approach

While the capability development approach was not meant to deal with the details of education policy, an elaboration that has been taken up elsewhere (Hasan 2010), it well complements the lifelong learning approach. In highlighting educational capability as a key element of the development process, it provides a basis for the learner-driven approach of the lifelong learning framework. The potential of the LLL framework for addressing the three problematic features of education in developing countries, identified earlier, can be illustrated with reference to the six education policy areas of Chart 29.1.

Strategic Priorities and Governance

Determining Education's Overall Priority: Judged from the percentage of GDP spent on education, low-income countries appear to place a lower societal value on education relative to the high-income countries. If the LLL approach was to be

²³This approach was captured in the Human Development Index, UNDP (1989), Chap. 3.

followed, this ranking would likely be higher because it would take better account of the educational needs currently being ignored. It would take fuller account of both economic and social demand for education, based on considerations of the role of education in the development process, social cohesion, equity, and use of education in poverty-reduction strategies. In comparison, under current practice, only the formal sector needs get considered and the non-formal and informal sectors get very limited hearing. A sub-sector approach often pits one sub-sector against another for resources within a given education envelope. What the LLL perspective suggests is that the overall envelope should itself be based on an assessment of all learning needs, which could then be considered against other societal goals. Inter-relationship between the sub-sectors falls between the stools in a policy-making regime based on sub-sectors of education. The LLL approach provides a better basis for understanding and choosing the appropriate value to be allotted to each sub-sector of education, including the non-formal and informal sectors. The approach does not suggest establishing a ministry encompassing all learning but the setting up of effective mechanisms for assessing all types of education needs.

Volume of Educational Provision: A higher ranking of education in societal priorities would imply a larger volume of educational provision compared with the outcomes under currently used policy approaches. Under current practices, decisions regarding total supply of places come out of an aggregation of decisions at the formal sub-sector levels. The general practice is to update historically attained levels with marginal accommodations for the push and pull within sub-sectors. Economic viability (on the basis of rates of return) is used as one criterion for some sub-sectors, especially at tertiary level to determine the offer of places. The lifelong learning approach would imply a much larger volume of learning activities than based on the market test, because the latter does not take the full account of social benefits, as for example conceptualised in the capability development approach.

The Need for Policy Coherence: Compared with the industrialised nations, lack of policy coherence is an even more challenging problem in the developing countries because of their generally poor state of policy development. The system-wide perspective of the lifelong learning approach is more useful in understanding and addressing different policy interactions compared with a sub-sector perspective. Some of the policy inter-connections will be missed if only the formal sub-sectors were considered. For example, the supply of skills and competence to the economy is not simply a matter of the formal sector. Tapping the skills formed in the informal sector is an important consideration in development policy. Similarly, the nature of the policy linkages differs by sub-sectors, and these differences need to be taken into account in the overall sector-wide view, which is proposed by the lifelong learning approach.

System Infrastructures: Establishing mechanisms for assessment, validation, recognition and integration of learning is particularly important for the developing countries because of their relatively large informal and non-formal learning sector compared with the industrialised countries. There is a strong need to assimilate the

large informal sector within a properly developed qualification structure in order to both improve quality and provide incentives for expanding the supply of non-formal provision. The quality of these forms of learning can be greatly enhanced by adding the necessary minimum of theoretical component, which can both improve performance and provide motivation for further skill acquisition. However, this implies that new and potentially quite different qualification structures will need to be developed, since it is clear that structures developed for the formal education will not translate easily into this quite different non-formal processes.

Types and Quality of Education

Types or Composition of Education Supply: The composition of educational provision by types and sub-sectors should be determined, according to the lifelong learning framework, by the relative importance of their needs. This suggests that greater attention should be paid to early childhood education and adult learning – sectors that are particularly weak links in the lifelong learning system in the developing countries. This is not meant to be at the expense of primary education or other sub-sectors of education. The argument is that higher level of resources for the education sector as a whole is required to address the weak elements of the system. In regard to the balance between the academic and vocational types of education, the lifelong approach would suggest greater attention to vocational and technical education both at the secondary and tertiary levels. These types of education have been neglected because of the supplier-driven focus of provision to the relative neglect of learner needs.

Quality: As noted previously, the lifelong learning framework emphasises three aspects of educational quality: the competence acquired, relevance to learner needs and motivation to learn. These three elements are even more important for the developing country context because of the serious problems of disconnection between societal needs and what the education sector currently supplies.

Equity of Educational Opportunities

The broader issues of income and social inequities are particularly vexing for the developing countries. The lifelong learning approach sees educational equity as key to social development and as an integral part of the broader development process. Its system-wide approach highlights the two-way links between educational inequities and social and economic stratification. The life cycle dimension is important for understanding and combating the vicious circles that can be generated by the interaction of social and educational arrangements: socio-economic factors play a large role in educational performance in early stages of life, which can then shape educational

participation and performance in later years of life (OECD 2007). Policies for educational equity therefore need to go beyond education policy and be linked to family and social policies.²⁴

Learning and Teaching Processes and Assessment of Performance

The learner-driven focus of the lifelong learning approach is particularly relevant for the developing countries. Implementing it would imply a major overhaul of the learning and teaching processes. Pedagogies, curricula, teacher training, use of ICT, approaches to assessment, all would require major reshaping. Much will need to be learnt from the culturally relevant modes of teaching, most easily seen in the non-formal and informal educational settings, and how these can influence known strategies that have worked well in formal educational settings.

How Much Investment?

For the reasons advanced earlier in the chapter, implementing the lifelong learning approach to education policy would, in general, imply a larger slice out of the national resources, both as a proportion of government budgets (currently around 25%) and in relation to GDP (currently around 4.5%). The level of this additional investment would, of course, depend upon the societal valuation of educational provision, its desired volume, type and quality. At the same time, it is important to recall that many aspects of the lifelong learning inspired reforms can be budget neutral.

Who Should Pay?

In regard to who pays, the issue centres on the balance between the private and the public sector contributions, and the contribution of individual learner versus the government and the employer. The guiding principle proposed by the lifelong learning framework would be to adopt approaches that would produce higher overall level of resources. This would imply developing incentives for the private sector to generate the maximum contribution it can make, subject to meeting the equity criterion. The same criterion, and the importance of the social demand for

²⁴For an analysis of the interaction of social and economic inequities, see Wilkinson and Pickett (2009).

education, would imply a much larger state contribution than under the alternative market-tested approaches to educational provision. This does not mean that the public sector should expand to replace the private sector, which in many developing countries plays a large role, but that the public sector contribution itself would need to be expanded, especially to promote educational equity.

Conclusion

This chapter views the forces that shape the educational enterprise of a country as an outcome of the interaction between the interests of the providers and those of the learners, the supply and the demand side, respectively, played out in the economic, social and technological context. Seen in this light, the LLL framework is interpreted as comprising two core features: one, a system-wide optic that views all conscious learning activities as part of a system of learning; and the second, a learner-driven approach suggesting that learners should have greater say in making education policy choices. This second element may be interpreted as a call for a strengthening the process of democratisation of education.

Both these elements are essential: a lifelong approach cannot be said to have been embraced with only one of them being in place. The chapter sets out six areas of education policy that can be used to assess the guidance offered by and the impact of the lifelong learning approach. Interpreted as an ongoing long-term process, progress in applying the lifelong learning approach is not to be seen as a one-off change in policy. It is better understood as a moving target. Implementing the learner-driven approach requires constant adjustment to changing educational technology, economic and social contexts.

Even though they have officially endorsed the lifelong learning approach at the ministerial level, OECD policy makers have not moved to address the full scope of its implications. For the general public, the politicians and the education policy makers, as well as for a majority of the academics, lifelong learning remains equated with the provision of learning opportunities for the adults. As a consequence, policy developments in the OECD countries show some but rather limited progress at the system level, mostly consisting of efforts to develop infrastructures such as qualifications framework and mechanisms for recognition of some forms of learning acquired outside the formal sector. Policies at the sub-sector level show greater progress, in the sense that a wide range of reforms being undertaken follow in the spirit of the lifelong learning approach. However, this is not due to a conscious embrace of the lifelong learning philosophy but more a consequence of the pressures being put by the contextual changes.

Compared with the OECD countries, the lifelong learning approach is even more relevant for the developing countries, for three main reasons. First, the approach accords well with the requirements of the new paradigms of the development process. It can therefore fit well with other policies pursued in support of economic development. Second, reforming the dysfunctional nature of the education sector

requires system-wide reforms, which is a key strength of the LLL approach. Third, there is an overwhelming need for strengthening the demand side of the educational system in all aspects of education. Contextual changes, which are helping such a shift to the demand side in the OECD countries, are not strong enough in the developing countries. The change in the mindset that is needed can only come through a conscious adoption of a focus that allows a greater say to learner interests and needs, a focus suggested by the lifelong learning approach. While a wholehearted embrace of the lifelong learning approach would imply raising the level of investment in education, it is useful to remember that in many policy areas the democratisation process advocated by the lifelong learning approach need not necessarily require additional resources, as progress can be achieved with a different use of the existing resources.

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