

National strategies for implementing lifelong learning (LLL) – the gap between policy and reality: An international perspective

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Abstract In this article, the late Jarl Bengtsson briefly traces the evolution of the concept of lifelong learning within the member states of the Organisation for Economic Co-operation and Development (OECD). He points out that on the one hand lifelong learning is accepted, in policy terms, by all OECD countries and many other countries, but on the other hand there is an uneven and slow pace of implementation of lifelong learning. He examines three main reasons for this, namely the lack of workable implementation strategies, the lack of a funding system and stakeholders' resistance to change. Without denying that each country is different and has to develop its own strategy, Bengtsson identifies a certain number of policy and research issues common to all countries, which are relevant to the acceleration of the implementation of lifelong learning strategies and programmes. Based on a paper originally presented at the Asia European Meeting (ASEM) Conference in Beijing in November 2009, this article closes with a reflection about where lifelong learning might be in 40 years' time. Jarl Bengtsson updated his seminal paper in 2012 for inclusion in this special issue on lifelong learning, taking into account recent developments such as the establishment of learning societies. Sadly, he died before publication was completed.

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Résumé Stratégies nationales pour réaliser l'apprentissage tout au long de la vie – le fossé entre politique et réalité : une perspective internationale – Dans cet article, feu Jarl Bengtsson retrace brièvement l'évolution du concept d'apprentissage tout au long de la vie dans les États membres de l'Organisation de Coopération et de Développement Économiques (OCDE). Il signale que si ce concept est accepté en termes de politiques dans tous les pays de l'OCDE et bien d'autres encore, le rythme de sa concrétisation est lent et inégal. Il examine trois raisons à ce fait, à savoir le manque de stratégies fiables pour la mise en œuvre, l'absence d'un système de financement et la résistance au changement de la part des parties prenantes. Tout en reconnaissant que chaque pays est différent et doit élaborer sa propre stratégie, Bengtsson identifie un certain nombre d'éléments de politique et de recherche communs à tous les pays, qui sont décisifs pour accélérer la mise en œuvre des stratégies et des programmes d'apprentissage tout au long de la vie. Inspiré d'un texte présenté à la conférence du Dialogue Asie-Europe (ASEM) à Pékin en novembre 2009, cet article se termine sur une anticipation quant à la position de l'apprentissage tout au long de la vie dans une quarantaine d'années. Jarl Bengtsson a actualisé en 2012 son article précurseur en vue de cette édition spéciale sur l'apprentissage tout au long de la vie, en y intégrant les évolutions récentes telles que la création de sociétés apprenantes. Il est malheureusement décédé avant la parution de cette édition.

Where are we coming from?

The last 40 years of international debates and developments around Lifelong Learning (LLL) have strong roots in the Scandinavian countries. Given these countries' century-old traditions of strong democratic movements, including innovative initiatives in favour of adult education, it should not come as a surprise that the early concepts of LLL and Recurrent Education originated here.

If a particular person should be mentioned, it would be the late Olof Palme from Sweden. Before becoming Prime Minister, he was Minister of Education and took part in the European Education Ministers' meeting in Versailles 1969. He then presented the first proposal for LLL to be implemented through a strategy of Recurrent Education (RE). At the same meeting, the French Minister of Education, Monsieur Edgar Faure, presented the concept of Permanent Education, but without a strategy how it could be implemented.

The concept of RE, as a strategy for implementing LLL, was picked up by the Organisation for Economic Co-operation and Development (OECD) and that of Permanent Education by the United Nations Educational, Scientific and Cultural Organization (UNESCO). When I joined the OECD at the end of 1971 to work on RE and LLL, the work was just starting. By the end of 1972, we had produced the clarifying report called *Recurrent Education: A Strategy for Lifelong Learning* (OECD 1973).

The book was a great success for the OECD, and soon RE and LLL became the education policy priority for OECD countries. A second publication called *Recurrent Education: Trends and Issues* (OECD 1975) was presented to the European Education Ministers' Meeting in Stockholm in 1975 and adopted as the education strategy for the future implementation of LLL. The basic objectives were: first to reduce educational disparities between the older and younger generations in favour of the older ones; second to strengthen the efficiency of the labour market and the economy; and finally to increase better coordination, vertically, between different education administrations (primary, secondary, higher education and adult education) and to better coordinate, horizontally, between different government departments (education, labour and economic). A huge amount of work was carried out within OECD countries and by the OECD on the subject during the 1970s.

At the beginning of the 1980s, the overall policy context changed. Following the second oil shock 1978–1979, when the OECD recommended to governments a more strict public expenditure policy, the commitment to RE and LLL started to falter. One specific reason was that in many countries a policy for RE and LLL was considered to be more expensive than a slight expansion of the traditional front-end model of education. So during the 1980s the OECD's education policy agenda became dominated by the concern for raising standards in traditional education systems measuring educational outputs. This is the period when the education indicators movement started. But the concept of LLL survived at the enterprise level. The 1990s were the period when new technologies entered forcefully into process and product innovations at the enterprise level. At this level human resource development took on a competitive edge, and continuing to upgrade skills and competences for the workforces became a must.

In the 1990s LLL was back on the policy agenda for public education (see *Lifelong Learning for All*, OECD 1996). LLL was back because Ministers of Education started to understand the dramatic changes taking place in the global economy, where each country started to compete with skills and competences and where skills and competences from the front-end model of education became quickly obsolete. However, the policy concept of LLL from the 1990s was, and still is today, a very vague concept, defined as learning from the cradle to the grave without a coherent strategy of implementation.

Where do we stand today?

So where do we stand today at the beginning of this new century? What seems to emerge is a kind of paradox. On the one hand LLL is accepted in policy terms, by all OECD countries and many others, as the only viable education and learning objective for this century. But on the other hand its implementation is weak, uneven and without strong commitment. For instance when it comes to some form of organised education and learning for adults, about two-thirds of the adult population in OECD countries do not participate. An OECD stocktaking on developments of LLL points to four broad groups of OECD countries. The Nordic countries stand out with good performances across multiple sectors. A second tier of countries – Canada,

the Czech Republic, Germany, the Netherlands and New Zealand – also do well, but have certain gaps or weaknesses in more areas. A third tier, including Australia, Switzerland, the United Kingdom and the United States, is characterised by comparatively uneven performance on the available measures, especially on measures of literacy. Finally, a fourth tier of countries – Ireland, Hungary, Portugal and Poland – do poorly in comparison to other countries on most measures (based on: Lifelong Learning. *OECD Policy Brief*, OECD 2004).

The reasons behind this slow and uneven pace of implementation of LLL are many and vary from country to country, but there seem to be three main reasons that operate in all countries.

The first one is the lack of workable and agreed-upon strategies for implementation. The current agreed-upon definition of LLL as learning from the cradle to the grave is far too vague, and not very useful in concrete policy action. What is needed seems to be a strategy like RE, based upon alternation between study and work and with clear implications how to change initial education to foster LLL later in life.

The second reason is the lack of a coherent and equitable system of financing LLL for all. No OECD country has yet put together such a system of financing, although a lot of debate is taking place. Existing systems tend to contribute to further inequalities in access to learning and education not least for adults.

The third reason for the slow implementation of LLL is the quite often underestimated resistance to change among the main stakeholders in the traditional system of education. We must always bear in mind that LLL represents a radical change to existing norms and patterns of learning as it is practised today in traditional front-end education. Teachers and school leaders are still today trained for transmitting content and learning based upon principles and norms dating back to the beginning of the last century. No one should be surprised that there is resistance. Therefore there seems to be an urgent need to reform teacher training in favour of a greater emphasis on how to teach students “to learn to learn”.

Where could we possibly go, in overcoming the gap between policy and reality?

There is certainly no universal strategy of implementing LLL that would fit all countries. Each country will have to develop its unique strategy, given the significant differences that exist in the political, economic, social and educational context. But it can be strongly argued that in doing so they all have to address a certain number of policy and research issues that are common to all countries. I would like to mention briefly six such issues that will have to be addressed, for which solutions will have to be found, in order to establish a successful national strategy for implementing LLL.

The first issue is to create the foundations for a joined-up government and administration for planning and action in favour of LLL. Such planning and action need to be addressed, vertically, among different parts of the educational system, with the basic purpose of identifying and adopting each part’s unique contribution to fostering the objectives of LLL. These would cover educational content and pedagogical approaches that would better fit the evolution of the learner’s need over

his and her life cycle. In this respect, one would have to address the pertinent issue of where human, social and cultural capitals are best formed over the individual life cycle. For instance over the last thirty years growth in human capital formation has been impressive in most OECD countries, but often to the detriment of forming social capital (see *The Well-being of Nations: The Role of Human and Social Capital*, OECD 2001a; and *Lifelong Learning and Human Capital*, *OECD Policy Brief*, OECD 2007a). For instance, the question has to be posed whether obligatory education should have a greater role in forming social and cultural capitals and that learning and education afterwards in a LLL system should have a greater role in forming above all human capital, but also cultural capitals. Planning and action will also be needed at the horizontal level. That is to say, among government departments at national and regional levels. It would have to include at least departments of education, economic, labour and social affairs. This is important because the individual learner during his life cycle will be affected by all these policy areas. A possible way to start this whole and complex process could be to organise annual forums on implementing LLL at national/regional levels, in which all main stakeholders would take part, in particular governments, social partners, civic society and the education and research communities.

The second issue relates to the need to create a coherent and affordable system of financing LLL. No such system exists today among OECD countries. So the task ahead is enormous. But the future success of LLL will, to a great extent, depend upon whether such a system of financing exists. Among OECD countries a consensus seems to emerge that such a system will have to be based upon three sources of finance, namely: the public and private sectors and the individual himself or herself. When it comes to the respective contributions from each of the three sources, huge differences and practices and traditions exist between countries, making any general model impossible at this stage. Each country will have to find its own model of how much each source should contribute. But the principal point is that all three sources will have to contribute. In addition to the three sources of financing LLL, there are two other important considerations to bring into the picture. On the one hand we have the issue of national accounts. Today in the national accounts, education is counted as consumption and not investment. Most economists today agree that we are moving fast to a knowledge-based economy, in which each country's knowledge stock becomes its most important asset. In this perspective, education needs to be seen as investment and not consumption. The consequences of such a shift for public finance are important as investment, and less penalising for public deficit than consumption. Work on revising national accounts is ongoing, but not directly on education, and each country committed to LLL needs to exert pressure to include education in this revision (see *Annual Report*, OECD 2008a). On the other hand, we have of course the deep ongoing crisis in the global finance sector, affecting all countries. The reform of this sector is urgently needed and will most likely be done. One of the critical issues here is to better connect the finance sector with the real economy. One of the reasons for the present crisis is that much of that connection has become weak and blurred over the last 20 years. In this respect of better connecting the two economic sectors, and given the fact that the real economic sector is becoming a knowledge sector, the question should be posed whether it would be profitable for the finance sector to

invest in skills and competences in the real knowledge-based economy. After all, the knowledge-based economy will increasingly compete and make profits based upon skills and competences. The implications of such a policy for the financing of the LLL from the private finance sector would be fundamental, and it is important to start a policy debate about this now, given the situation in the finance sector and its hesitant readiness to reform.

The third issue relates to the need to examine the links between qualifications and LLL. To learn one set of skills and competences at schools and universities is no longer enough for an individual's performance in working life. There is one basic skill that is of fundamental importance in a fast-changing knowledge economy: namely being able to learn and adapt to new skills requirements. But learning to learn is not sufficient, individuals need to be sure that the new skills that they acquire are also reflected in the qualification systems that give them credit for the experience and knowledge they have gained, whether in the classroom, in the workplace or elsewhere. Countries have been trying for some time to reform their qualification systems to make LLL more possible. Most policy makers believe that there is a link between a qualification system and LLL, but it is not clear up to now what link there is and how it works. If we can identify and understand the ways in which national qualification systems deliver, or fail to deliver, LLL, the positive links can be used for policy makers as a basis for reforming qualification systems to the benefit of LLL. The ultimate goal is a qualification system that provides high-quality recognition of learning. There is no unique solution, each country has its own system and culture to start with, but it should be possible to identify the factors that need to be taken into account in developing a qualification system for LLL. For instance there seems to be a general agreement about the fact that an individual's experience during compulsory schooling has a powerful impact on attitudes to learning in later life. An individual who leaves the compulsory school system with a sense of failure may well avoid learning in the future, seeing it simply as a chance to fail again (see *Qualification and Lifelong Learning. OECD Policy Brief*, OECD 2007b). In other words a critical challenge for compulsory education, in a system of LLL, will be to assure that motivation for learning is as strong at the end of it as it is at the beginning.

The fourth issue relates to the need to develop indicators to track the implementation of LLL. In the late 1990s, OECD started to develop institution-based indicators for LLL. It tried to measure how LLL objectives and participation manifested themselves in different parts of the education systems. It provided useful information, but considerable problems emerged in terms of definitions of what constituted the elements of LLL in different parts of the system, including adult education and not least learning at the workplace. Given the worldwide success of OECD's work on the PISA study (Programme for International Student Assessment, www.PISA.OECD.org), the Organisation launched a new and big study called PIAAC (Programme for the International Assessment of Adult competences, www.OECD.org) in 2010. This survey study of adults in the age brackets from 16 to 65 will, for the first time, provide comparative data on adult competences ranging from cognitive to workplace skills and competences. Needless to say PIAAC will, by definition, provide pertinent information about progress or lack of progress in implementing LLL. The first results will be available by October 2013.

Over time, it might turn out to be an even more important source for policy makers concerned with the implementation of LLL than the information provided by PISA. Hence the importance for countries to get involved in PIAAC, or at least follow the results closely, and these results will also influence OECD's new "Skillstrategy". (see *Better Skills, Better Jobs, Better Lives: A Strategic Approach to Skills Policies*, OECD 2012).

The fifth issue relates to the rapidly growing movement of Learning Cities (LC) and Learning Regions (LR). Both have their origin in the work started by OECD in the early 1990s. The point of departure was the fact that cities and regions, economic, social and cultural developments had become closely related to their education infrastructures and learning cultures.

Today, these movements have become global, as described by Norman Longworth and Michael Osborne (in their book *Perspectives on Learning Cities and Regions: Policy, Practice and Participation*; Longworth and Osborne 2010). Furthermore, over the last couple of years, these movements have also been increasingly influenced by issues and problems related to green growth. This is manifested in initiatives, like Green Cities, Smart Cities, Healthy Cities and Ecowell Cities, to name just a few.

However, the important point to be made, here, is that these movements constitute a crucial asset for national governments in implementing LLL. Hence the importance of forging closer links between local governments creating LC and LR, and national governments creating frameworks for implementing LLL. An interesting recent initiative in this respect is the one taken by UNESCO and monitored by its Institute for Lifelong Learning in Hamburg (UIL) to develop an international platform for learning cities.

The sixth issue relates to the need to strengthen research (R) and development (D) for LLL. Present systems of education R and D tend to be too biased towards learning and education for young people and not enough R and D is devoted to learning and education over the individual life cycle. There is a triple challenge for R and D on LLL. First there is the need to raise fresh financial resources. In general the education sector is the most underfunded knowledge sector, in terms of R and D, in the whole knowledge economy. Moreover most of the R and D for education is funded from the public sector. Hence there is an urgent need to bring in new resources from the private sector to finance R and D for LLL.

Second, there is also the need to stimulate and develop more interdisciplinary R and D on LLL. There is a need for teamwork between educators, economists, political scientists, etc. ... Most OECD countries have a nearly hundred-year-old tradition of research on pedagogy and learning, but this research has so far provided very little tangible results for LLL.

Third, the characteristics of the knowledge economy need much further analysis by research, and not least the learning dimensions of it. To simplify, the knowledge economy can be seen as being structured around three principal components; the production of knowledge, the mediation of knowledge and the use of knowledge. By definition, Education R and D has a great potential to help clarify issues and problems in all three components as they relate to learning in the knowledge economy.

Another important challenge, over time, for education R and D is brain research and learning. During the last 15 years a new research discipline has emerged, thanks not least to the use of new scanner technology, for brain research and learning. In the late 1990s, the OECD created an international network of leading neuroscientists, brain researchers and educators with the purpose of studying learning from a brain perspective over the individuals' life cycle. The work continues, but has already provided some findings that have deep and clear implications for LLL (see *Understanding the Brain: The Birth of a New Learning Science*, OECD 2007c). For instance, the plasticity of the human brain makes it fully capable to learn throughout its life cycle if provided with a rich and stimulating environment. Furthermore, the brain learns through a variety of ways, and emotions and the way to learn play an important role in memorisation. Confucius's words from over a thousand years ago seem still to be valid "I hear and I forget, I see and I remember, I do and I understand".

Some concluding remarks and a glance ahead through scenarios

The analytical story described above is a story of success and failure for LLL. Success, in terms of acceptance by the policy community. Failure, in terms of its weak implementation. I have tried to briefly present the story of the LLL movement: where it comes from, where it stands today and the critical issues that have to be addressed in the near future to accelerate the implementation of LLL. The LLL movement covers a period of over 40 years, and it is tempting at the end of this paper to reflect about where LLL might be in 40 years' time. Scenarios for the future of schooling, the future of universities have been envisaged in *What Schools for the Future?*, *Higher Education to 2030* and *Trends Shaping Education 2008*; OECD 2001b, 2009, 2008b respectively), but nothing to my knowledge has been done about the future of LLL. To stimulate debate and further thinking on this topic I would like to propose briefly four possible scenarios for LLL 40 years ahead.

Scenario 1

LLL has been implemented. The critical issues and challenges outlined above have been settled. Profound changes have taken place in the front-end model of education, integrating it into a coherent system of LLL. Programmes and curricula have been redesigned to be brain-friendly, based upon new learning and brain research. To combat social exclusion and increase LLL contribution to the knowledge society and economy, governments have revised the notion and practice of obligatory education. It now includes a period of alternation between education and work at the end of secondary education, and shorter obligatory periods of recurrent education and learning for adults, if such learning and education are not provided at the workplace. A system of financing based on partnership between the public and private sectors has been established.

Scenario 2

LLL continues to be a marginal activity in the educational landscape. It is still situated in the periphery of mainstream front-end education. This system is successfully defended by powerful stakeholders ranging from professionals in the system to parents. The demand for traditional education continues to shift from public to private education. Job training and learning at the workplace have become an integral part of the jobs for those employed in the knowledge economy. Social exclusion continues to grow, due to increasing inequalities in the possession of knowledge. The knowledge economy is constantly growing, but at the same time a fragmented knowledge/democratic society is rapidly developing.

Scenario 3

Educational policy making is in a critical stage. The front-end model of education has started to melt down. It has failed to respond to the demands from the knowledge economy and society, and has contributed to aggravating social exclusion. For those employed in the knowledge economy, a high-performing LLL system exists, but the number of socially excluded has increased considerably. Demand for traditional private education is decreasing due to too high fees. Private initiative, less costly in favour of IT-based education and learning, is on the increase. Dropout from formal public education is on continuous increase and the notion and reality of obligatory education is being seriously questioned. Governments are hesitating between a profound overhaul of the fragmented existing education system in favour of a coherent LLL system, or leaving the formation of skills and competences to the market. After all, the most important asset in the market are skills and competences, hence the market should pay for it, while governments are tempted to give priority to the formation of social and cultural capitals in initial education.

Scenario 4

In most countries, Learning Cities and Learning Regions have become the main agents for implementing LLL for all. Learning and education have changed from being basically supply-based to a much more demand-driven system. Skills mismatches between supply and demand have to a large extent disappeared, not least thanks to strong partnership between the supply and demand sides. This, in turn, has led to a strong focus on innovation in learning and education.

National governments are strongly supporting these developments, in particular through monitoring a flexible but coherent system of accreditation of LLL. It provides block grants to cities and regions for the implementation of LLL, financed by revenues from a Tobin Learning Tax.

Cities and Regions and the individuals also contribute also to the financing of LLL, seen by them as investments for a green growth future.

These four, roughly-painted scenarios are just presented to stimulate further thinking, and to raise awareness of the extremely complicated political, economic,

social and cultural factors that will be involved in any serious attempt to fully implement LLL. As an example with humour of the absurdity of the present education model, let me finish with a quote from Sir Richard Livingstone, cited by Frank W. Jessup:

What lovers of paradox we British are! Youth studies but cannot act; the adult must act but has no opportunity of study; and we accept the divorce complacently ... We behave like people who should try to give their children in a week all the food they require for a year; a method which might seem to save time and trouble, but would not improve digestion, efficiency, or health (Livingstone 1943, quoted in Jessup 1969, p. 17).

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Jarl Bengtsson The late Jarl Bengtsson was Counsellor and Head of Centre for Educational Research and Innovation (CERI) at the OECD, having joined the organisation in 1972 and remained there until his retirement. He headed CERI from 1991 and was involved in most of its educational initiatives, notably: Recurrent Education; Lifelong Learning; Schooling for Tomorrow; Early Childhood Care and Education; Education and Regional Development; Human Resources Development; School-to-Work Transitions; Educational Research and Development in the Knowledge-Based Economies and Societies; Education and Sustainable Development; the Brain and Learning; and Education Statistics and Indicators, particularly work on human and social capital formation. Prior to joining OECD, he was a Professor of Education at the University of Gothenburg, Sweden, and advisor to the Swedish Minister of Education and later Prime Minister, Olof Palme. After retirement, he was the inaugural Chair of the Advisory Board of the Pascal Observatory, a position he relinquished in 2012 just before his untimely death. He was also a professor at the Danish School of Education. He remained a highly committed proponent of lifelong learning and the provision of opportunity for the excluded throughout his life, and was a kind and supportive colleague of all who worked with him. He will be sorely missed by colleagues and of course his family.