



# Tracing the effects and impacts of the *Memorandum on Lifelong Learning* in the scholarly debate since its inception

Ekkehard Nuisl<sup>1,3</sup> · Simona Sava<sup>2,3</sup>

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## Abstract

The *Memorandum on Lifelong Learning* was launched in October 2000 by the European Commission and has been debated ever since in all member states of the European Union, leading to the publication of a follow-up document in 2001 which promoted a “European area of lifelong learning”. The *Memorandum* was a unique document in terms of both form and content, and its outcome and immediate impact were remarkable. But what is the long-term effect of this document, considering policymaking processes and scholarly debates in various EU member states and beyond? The authors of this article aim to answer this question by highlighting the *Memorandum’s* “key messages” and analysing how it is referenced in academic papers and publications. Their main findings confirm the *Memorandum’s* significant impact, including a long-term one, particularly in raising awareness of the importance of adult education in the political debate. Despite a decrease in explicit references to the document in policy papers over the past ten years, other more recent references to the *Memorandum* can still be identified in the latest policy documents and academic debates. Scholarly papers are particularly interested in critical content analysis, pointing out the strengths and limitations of the *Memorandum* and its follow-up document. During the past decade, the academic debate has become more active than in the first ten years since the *Memorandum’s* publication, demonstrating its long-term impact on various sectors in the field of lifelong learning, even outside Europe.

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✉ Simona Sava  
lidia.sava@e-uvt.ro

Ekkehard Nuisl  
nuissl@die-bonn.de

<sup>1</sup> Technical University of Kaiserslautern, Kaiserslautern, Germany

<sup>2</sup> Department of Educational Sciences, West University of Timișoara, Timisoara, Romania

<sup>3</sup> International Adult and Continuing Education Hall of Fame, Norman, USA

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## Résumé

Retracer les effets et impacts du *Mémorandum sur l'éducation et la formation tout au long de la vie* dans le débat intellectuel depuis sa création – Lancé en octobre 2000 par la Commission européenne, le *Mémorandum sur l'apprentissage tout au long de la vie* a fait depuis l'objet de débats au sein de tous les États membres de l'Union européenne et conduit en 2001 à la publication d'un document de suivi intitulé : « Réaliser un espace européen d'éducation et de formation tout au long de la vie. » Le *Mémorandum* était un document unique quant à sa forme et à son contenu, et le résultat qu'il produisit lors de sa parution, de même que sa répercussion immédiate furent remarquables. Toutefois quels en sont les effets à long terme compte tenu des processus politiques et des débats intellectuels dans les différents États membres de l'UE et ailleurs ? Les auteurs de cet article entendent répondre à cette question en mettant en lumière les « messages » du *Mémorandum* et en analysant la mesure dans laquelle des articles et publications scientifiques y font référence. Leurs principales conclusions confirment l'impact considérable du *Mémorandum*, y compris à long terme, notamment en ce qui concerne la sensibilisation accrue à l'importance de l'éducation des adultes dans le débat politique. Malgré une baisse des références explicites à ce document dans les documents politiques de ces dix dernières années, on relève encore des références dans les tous derniers documents politiques et débats scientifiques. Des articles scientifiques s'intéressent en particulier à l'analyse de contenus stratégiques, soulignant les points forts et les limites du *Mémorandum* et de son document de suivi. Ces dix dernières années, le débat scientifique a été plus animé que durant la décennie qui a suivi la publication du *Mémorandum*, ce qui prouve son effet à long terme sur les différents secteurs de l'apprentissage tout au long de la vie, même hors d'Europe.

## Introduction: the *Memorandum*

The *Memorandum on Lifelong Learning* (henceforth referred to as the *Memorandum*) was launched by the European Commission in October 2000 (CEC 2000), with the vision to articulate the ways in which lifelong learning (henceforth referred to as LLL) can contribute to a “successful transition to a knowledge-based economy and society” (CEC 2000, p. 3). As the European Union (EU) had striven to become the world's most dynamic knowledge-based economy by 2010 (CoEU 2000), one of its highest priorities was the design of comprehensive strategies for investing in gaining and renewing the skills of its workforce. Thus, the *Memorandum* stands in a context of increasing political interest for LLL in the European Union, seen as a strategic solution to “encourage and equip people to participate more actively ... in all spheres of modern public life, especially in social and political life at all levels of the community” (CEC 2000, p. 5), simultaneously securing higher levels of employability in an inclusive society.

The *Memorandum* is indeed a visionary document as it draws on more than 10 years of developments and efforts dedicated to the field of lifelong education and learning, on the conceptualisation of the first White Paper entitled “Teaching and Learning: Towards a Cognitive Society” (EC 1995), on the achievements of the European Year of Lifelong Learning (proclaimed for 1996), on a series of Presidency conferences (starting with the one in Athens, in 1994) and on many years of EU-funded projects in the field. The *Memorandum* incorporates the main themes of the debates and developments which viewed LLL as an important field of policymaking in the EU since the Maastricht Treaty (EU 1992), also formulating the state of the art in the field and questioning the future of education. At the same time, the *Memorandum* can be considered the European answer to the International Commission on Education for the Twenty-First Century’s report (Delors et al. 1996) to the United Nations Educational, Scientific and Cultural Organization (UNESCO), in the sense that the *Memorandum* indeed views learning as “the treasure within”. It also aligns with the Agenda for the Future adopted in 1997 at the Fifth International Conference on Adult Education (CONFINTEA V) in Hamburg (UIE 1997).

The *Memorandum* aimed to stimulate debates and actions across Europe by implementing a soft (i.e. not legally binding) and “open method of coordination” (CoEU 2000, item 7), a principle agreed upon by all EU member states in Lisbon (Bechtel et al. 2005). Subsequently, it became an important milestone in achieving the aim of creating a “Europe of knowledge” (CEC 1997) by 2010, a goal adopted by the same conference in Lisbon in 1999. Once it had been launched, the *Memorandum* became very popular because it was actively debated in all European countries and generated a lot of feedback. The European Commission compiled the suggestions received in a follow-up document entitled “Making a European Area of Lifelong Learning a Reality” (CEC 2001). This wide consultation process, unique to this policy document, has been instrumental in ensuring that the *Memorandum* and its “key messages” have become well known.

What was innovative about the approach of the *Memorandum* is that it addresses, by way of soft and open coordination, all potential LLL partners in Europe. This includes member states, their regional and local administrations, enterprises, social partners, associations, educational institutions, and, last but not least, potential learners themselves. It is the very nature of its discursive procedure which has enabled the *Memorandum* to contribute to the extensive implementation of LLL in Europe.

The *Memorandum* is not a voluminous paper, its main part (not counting the two annexes) comprises 23 pages, which is in line with a traditional memorandum format. Typically, the “key messages”, of which there are six, are all presented in a consistent manner: they are introduced under a short heading, followed by the objective of this particular key message, the arguments supporting the objective, then a more detailed explanation of the key message, and finally a number of relevant questions to be clarified in future debates. The two annexes complement the main part by giving examples of good practices, each illustrating one of the key messages, along with arguments for setting up benchmarks and indicators to monitor progress for each of the objectives. Including the annexes, the whole document thus spans 36 pages.

In the beginning, the *Memorandum* argues that access to education, information and knowledge, along with the motivation for an intelligent use of these resources, is “the key to strengthening Europe’s competitiveness and improving the employability and adaptability of the workforce” (CEC 2000, p. 5). Two equally important aims of LLL are further mentioned: “promoting active citizenship and promoting employability” (ibid.).

The *Memorandum’s* six “key messages” concern (1) access to learning; (2) investment in human capital; (3) teaching and learning methods and innovative pedagogies; (4) assessment of learning outcomes; (5) provision of information and counselling services; and (6) learning opportunities close to citizen’s living environments. These six key messages present a nutshell summary of the main educational issues in the years prior to the inception of the document. Analyses of the *Memorandum* and its impact on subsequent educational developments have led to various comments and remarks, ranging from the well-known saying “old wine in new bottles” (Borg and Mayo 2005) heard shortly after its publication to

The *Memorandum* remains the most influential but also the most dissimulated policy document that the European Commission has produced, and as such it rests as a basis of any debate on lifelong learning policies in Europe (Zarifis and Gravani 2014, p. 2).

These two perspectives best summarise the effects and impact of the *Memorandum* in the subsequent decade.

The key messages of the *Memorandum* aim to reunite the elements of a comprehensive strategy for LLL, by highlighting points of reflection in the form of questions for further debate. These questions have served to stimulate educators in LLL to find solutions for achieving the aims of each key message. Overall, the key messages represent forms of integrated action which must lead to the accomplishment of the following three crucial aims for a knowledge-based society: (1) more investment in human capital; (2) more people integrated into the workforce; and (3) more flexibility and adaptive capacity in people and businesses. These goals are ambitious, and they are mainly economically motivated. In addition to the six key messages mentioned above, the *Memorandum* puts special emphasis on developing benchmarks and indicators to monitor to what extent these ambitious goals can be reached.

Since these are strategic objectives and lines of action, they were considered valid not only for the EU and its member states, but also influenced debates and policy framing for LLL globally. This influential reach was made possible through the actions of international organisations, such as UNESCO and the Organisation for Economic Co-operation and Development (OECD), which contributed to the popularising of the concept and other similar approaches to making LLL a reality (Field and Schemmann 2017; Lee and Jan 2018; Lima et al. 2022). Explicit references to the *Memorandum* are visible in the conceptualisation of LLL strategies in Japan (Ogawa 2009; Okumoto 2008), Iran (Laal 2011), Taiwan (Chang 2012), Africa (Preece 2013), Turkey (Özgür 2020) and the United States (Wilson 2009).

Even though explicit references to the *Memorandum* are clearly discernible in the policy documents which followed the *Memorandum*, particularly those launched in

the 2000s, it is not our aim to analyse them here. Instead, we wish to demonstrate how the *Memorandum* was explicitly and actively reflected in the scholarly debate emerging after its inception. Furthermore, in the course of this article we also discuss policy developments which were inspired by the *Memorandum*. Many of the handbooks, encyclopaedias and scholarly journals published in the subsequent two decades, edited by major international publishers, such as Routledge, Springer or SAGE, referenced the *Memorandum*. It became a reliable source and trustworthy reference for different types of political and educational research in adult learning and education (henceforth referred to as ALE), including comparative, critical, impact and historical analyses. International journals published special issues on this topic, providing different views on national and international developments in ALE, drawing on the *Memorandum* as a pivotal document.

In short, the aim of this study is to map the influence of the *Memorandum* in different contexts and to assess the impact of this document launched more than 20 years ago. Our main research questions (RQs) are the following:

- RQ1 In which way does the debate in adult education and LLL refer to the *Memorandum*?; and  
RQ2 how does the debate align with the *Memorandum*'s key messages?

## Method of analysis

To select relevant material for a literature review which would provide a critical account of the existing sources on this particular topic, we searched for “Memorandum on Lifelong Learning” on Google Academic in four phases, starting in September 2022. We then refreshed the same search in December 2022, again in January 2023, and finally in March 2023. All in all, we found 67,300 results, with 4,270 relevant search results listed for the *Memorandum on Lifelong Learning*.<sup>1</sup> From September 2022 to March 2023, more than 1,000 new posts emerged, showing that the *Memorandum* is still cited, and most probably it is also still in use. We ran another search on Google using the document's registered number, “SEC (2000) 1832”, which generated 6,410 results, while on Google Academic 990 results were found. We analysed all the titles of the results, and in some cases, we also examined the abstract.

Out of all the results, we selected 172 articles, according to the following criteria: *accessible* (published or accessible online); *scientific* (based on theoretical or empirical data); and *reliable* (trustworthy sources and cited). We disregarded national reports conducted during the consultation process and their results, papers lacking any mention of the *Memorandum*, and unpublished conference papers or posts.

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<sup>1</sup> We are aware that the number might vary depending on the location from where the search is conducted. A search in Romania, for instance, may yield slightly different results from a search in Germany. We conducted our own search in Germany.

Grouping the selected texts around this complex topic allowed us to identify the extent to which the *Memorandum* has been the focus of specialised literature and to measure the overall state of research activity in this area (Arksey and O'Malley 2005). “[T]o convey the breadth and depth of a field”, scoping reviews typically “examine the extent, range, and nature of research activity”, without focusing on examining the quality of the research findings (Levac et. al. 2010, p. 1). Our analysis of the impact of the *Memorandum* over the past 22 years aims to portray the extent to which the document has contributed to the debates and solutions in LLL. The literature review below is based on an iterative narrative account of the existing literature in the field.

We began by interpreting the information, data and evaluations of the key messages and themes of the *Memorandum*. In our investigation of the medium- and long-term effects of the *Memorandum*, we focus on two aspects which we consider to be the most important ones:

- *Discourse and terminology*: the way in which the international debate has been shaped by the key messages and the approaches of the *Memorandum*. Our hypothesis is that the terminology used in the *Memorandum* has had an impact on the educational debate not only in Europe but also in other world regions, shaping the theoretical field of education and unifying various discourses and approaches in LLL. In our analysis, these aspects are among the most recurrent ones, as shown by the number of publications.
- *Topics and messages*: we take the key messages of the *Memorandum* as starting points to evaluate the state of the art in the field more than 20 years after the document's inception; we pay special attention to how the same topics are discussed nowadays, which of the aspects mentioned in the key messages are still relevant and how they are reflected in academic publications.

It is difficult to ascertain whether a political activity or a scholarly discussion is directly related to the *Memorandum* or caused by it, even if it resonates with the document's position and key messages. The relationship is rather indirect. In several cases this relationship is explicitly pointed out, while in others it can be assumed that it relates to the *Memorandum* and its key messages. Our main focus is on those cases where the relationship is explicitly mentioned. However, our synthesis neither seeks “to aggregate findings from different studies”, nor “to present a view regarding the ‘weight’ of evidence in relation to particular interventions or policies” (Arksey and O'Malley 2005, p. 19). Rather, it is based on the *Memorandum's* key messages, as “the scoping study does not seek to assess quality of evidence and consequently cannot determine whether particular studies provide robust or generalisable findings” (ibid.).

Therefore, our assessment of the extent of the impact of the *Memorandum's* key messages or of the document as a whole does not provide quantitative evidence. It is mainly synthesised in the form of a concise overview (Arksey and O'Malley 2005), taking into account the *Memorandum's* effects on different sectors of ALE, its influence on various target groups, and its presence in different locations in the world where the *Memorandum* is explicitly referenced, providing a basis for interventions and debates. Our synthesis captures the most significant patterns and trends in the

field. The scope of this article does not, however, allow for an in-depth analysis of various other debates, positions and developments.

## Discourse and terminology, reception and analyses

### Discourse

With the *Memorandum*, the European Commission chose a unique way of debate, which was not often used before. A “Memorandum” is a type of text which acts as a reminder and an admonishment. It is a type of text which focuses on formulating and advancing a discourse and indeed, it is a type of text which is not only relevant for stakeholders, scholars and politicians, but also for the general public.

Specifically, the “new open method of coordination” referred to throughout the *Memorandum* builds on the fact that while EU member states are autonomous in addressing political questions, they are all interested in common discussions and solutions for problems, aims and measures. The process of open coordination began with a first draft of the *Memorandum*, which was handed out to all EU member states and candidate countries in March 2000. These states were asked to organise a broad national process debating the aims and key messages of the *Memorandum*, to summarise the results and to forward them to the European Commission, which then fed the countries’ input into a final version of the document, published in October (CEC 2000). The time frame for this procedure was quite short, only half a year, but all member states managed to accomplish this task in due time. It was a challenging task, since not only public authorities (ministries and public institutions), but also non-governmental organisations (NGOs) and representatives from the academic community were involved.

It might be argued that it was precisely this broad dialogue format which led to a political effect which cannot be overestimated. The *Memorandum* itself defines the aim of this method as such:

It is the Member States who, in the first instance, are responsible for their education and training systems – each according to their institutional circumstances. In practice, the achievements of these systems are dependent upon the input and commitment of a wide range of actors from all walks of social and economic life, including the social partners – and not least upon the efforts of individuals themselves, who, in the last instance, are responsible for pursuing their own learning (CEC 2000, p. 5).

In the year 2000, all over Europe, the majority of individuals and organisations who were involved in the development of ALE focused their discussion on the key messages and main points raised by the *Memorandum*. Not only did LLL itself become more important, but LLL and ALE were soon also part of national discourses, with all of this happening without compulsory or legal requirements. As a follow-up to the *Memorandum*, upcoming national conceptualisations were compared and contrasted with its key messages, terminology and structure (EC et al. 2001).



The key messages of the *Memorandum* remained recommendations and their implementation was not compulsory, but – as is typically the case with the open method of coordination – they became a matter for legitimization of political programmes and decisions in the field. The amount of financing, the focus on underprivileged groups, the introduction and establishment of support systems like information and counselling services, the assurance of quality – all these measures became criteria for policymaking in ALE. The implications at national level were extensively discussed throughout the whole of Europe.

In subsequent years, the *Memorandum* and its key messages were also discussed in similar discourses in Asia, Australia, Africa and North America. In addition, a plethora of publications focused on analyses of the reception and implementation of the *Memorandum* in the respective countries or regions, in their LLL strategies and sectoral policy measures. Such publications were mostly based on content analysis, critical discourse analysis or comparative analysis, with an emphasis on the implications in various countries (Vieira do Nascimento and Valdés-Cotera 2018). For instance, the Nordic model of LLL (within the Nordic welfare state) was developed in response to the *Memorandum* (Rubenson 2006), solutions found in Southeast Asia were influenced by the *Memorandum* (Han 2017), and there were also African responses to its key messages (Preece 2013; Vieira do Nascimento and Valdés-Cotera 2018), to give just a few examples. Further research might be conducted to analyse the main aspects of the *Memorandum* being discussed in a number of countries and global regions, in relation to their respective starting positions.

## Terminology

The *Memorandum's* title suggests that it is about “lifelong learning”, which is regarded as a central term throughout the document, not merely used as a sort of headline (Kurth 2006). But on closer inspection, since most of the references are related to individuals able to competently act on the labour market, it is a *Memorandum* on *adult* and continuing education and learning, and less about children or pupils enrolled in formal schooling. While there is indeed an implied tendency to improve links among different sectors of the national education system as well as connecting the entire national education system with the “world outside”, these connections are not too carefully articulated. At the core of the argument lies ALE. However, there is no explanation why the *Memorandum* is not called “The Memorandum on adult and continuing education and learning”. Obviously, there is this theoretical approach which claims that an educational system should not differentiate among learners according to their biographies in terms of age groups and functions, but rather view the system as a coherent structure. There are, however, only few contexts in ALE which embrace this concept.

The *Memorandum* demonstrates a clear preference for using the term *learning* instead of *education*. This goes back to the discussion which arose some years ago around the emerging terms of “self-directed learning” or “self-learning” and the adaptation of the theory of constructivism (Arnold and Siebert 2003). Here the *Memorandum* echoes some of the main ideas brought forward in in previous



publications such as *Learning: The treasure within* (Delors et al. 1996) and others, issued in the context of CONFINTEA V (UIE 1997) and working papers from the OECD, the World Bank, the United Nations Development Programme (UNDP) and the International Labour Organization (ILO) during the 1990s. The *Memorandum* insisted that the international debate should henceforth use “adult learning” instead of “adult education”, which later became “adult learning and education” (ALE) (Bélanger 2016).

The *Memorandum* also takes a clear position regarding the *relationship* between *general education* and *vocational education*. It follows the notion already designed in the Maastricht Treaty (EU 1992) that there is basically no real difference between vocational and general education. All the parts described as the “education and training system” in the *Memorandum* contain both general and vocational contents. In some EU member states, such as Germany, for instance, this became a triggering force, leading to reforms, which have still not been fully implemented. The main obstacles to equal treatment of general and vocational education often arise from the distinct funding structures in place for these two sectors in many countries, and from their positioning in different areas of political administration.<sup>2</sup> Also, statistics on European ALE, based mainly on the results of the triennial Adult Education Survey (AES) which maps European adult citizens’ participation/non-participation in lifelong learning,<sup>3</sup> are still reported in two distinct categories: vocational training (2 subcategories) and general education (1 subcategory).

Regarding the terms *qualification* and *competence*, the *Memorandum* still seems hesitant.<sup>4</sup> Since the mid-1990s, the term “competence” has described skills, knowledge, capabilities, etc. In the Nordic countries in particular, the term “competence” was used very often, while other European countries kept the term “qualification” instead. While the *Memorandum* does use the terms “competence[s]” (11 mentions; plus 5 in a section dedicated to France) and “qualification[s]” (17 mentions), it talks about “new basic skills for all” (CEC 2000, p. 10) and, with reference to the Lisbon Strategy (CoEU 2000), specifies foreign languages, and digital, entrepreneurial and social skills, all of which are “required for active participation in the knowledge society and economy” (CEC 2000, p. 10). The *Memorandum* shifted the focus from the notion of ‘knowing how to do something’ to the notion of ‘being capable of doing something’, which in subsequent years led to the change from input-oriented to output-oriented statistics of teaching and learning processes. This change became clearly visible in the follow-up of the European Qualifications Framework (EQF) (EP and CoEU 2008; CoEU 2017) in European countries and their national qualification frameworks (NQFs).

<sup>2</sup> In Germany, for instance, general education is funded mostly by the learners, while “[t]hree parties contribute towards the financing of vocational education and training: the companies, the public sector and the trainees themselves” (Müller et al. 2017, p. 33).

<sup>3</sup> For more information on the Adult Education Survey (AES), visit <https://ec.europa.eu/eurostat/web/microdata/adult-education-survey> [accessed 13 March 2024].

<sup>4</sup> Our own preference in the present article is the term competence[s].

The *Memorandum* has played a fundamental role in the European debate on ALE by *establishing a number of basic terms*. These have further shaped the field of LLL, particularly in the area of formal, non-formal and informal learning, and also in the “lifewide” dimension (CEC 2000, p. 8) of learning, competences, quality and learning outcomes. While these terms had been previously used in several other contexts, and were thus not completely new, they gained familiarity in all European countries with the Europe-wide discussion about the *Memorandum* and its key messages. Despite some theoretical inconsistencies, education and learning are now structured according to the trio of formal, non-formal, and informal learning. Organised ALE, seen as non-formal learning, can be placed in the middle, but the position on this issue differs from country to country. Informal learning is largely seen as an activity performed by adults and very rarely includes the insight that children and youth also engage in it. In the decades following the *Memorandum’s* inception, this conceptualisation of informal learning led to a number of innovations, such as the acknowledgement – indeed the accreditation – of prior and experiential learning (APEL), which is mentioned and regarded as “absolutely essential” in the *Memorandum* (CEC 2000, p. 15).

If the terminology, topics and key messages mentioned in the *Memorandum* have significantly influenced debates in education, policymaking processes and actions in ALE, from a scientific/academic point of view, it can be also argued that the document has become a point of reference for numerous investigative studies and theoretical analyses.

Considering the volume of scientific evidence debating the role of the *Memorandum* in stimulating the conceptualisation of LLL, it seems reasonable to conclude that the open method of coordination approach has fulfilled its additional purpose of influencing the dialogue within the academic community. Most of the scholarly publications discussing the *Memorandum* analyse its contribution to further conceptualisation of the LLL discourse, strategies and policy documents.

## Reception and analyses

A large number of scholarly publications, particularly those published in the first decade after the inception of the *Memorandum*, performed content analysis, seeking to elucidate the basic concepts of the *Memorandum*. As a result, there are analyses which examine the coherence of the key terms launched with the document and delve into the further implications of these concepts for future developments in education. Many authors analysed aspects related to conceptualising learning (Alves et al. 2010; Barros 2012; Borg and Mayo 2005; Feketéné Szakos 2014; Hinzen 2011; Jarvis 2004; Mayo 2014). These analyses explored the scope and aims of LLL and the way in which the *Memorandum* aligned the economic goals with social cohesion and the individual’s needs (Alves et al. 2010; Aspin et al. 2012; Biesta 2006; Mayo 2014, English and Mayo 2021; Walters et al. 2020). The analyses also mirrored the influence of neoliberal policies on the *Memorandum’s* approach (Barros 2012; Olsesen 2006; Schuetze 2006; Rubenson 2019; Mikelatou and Arvanitis 2018; Milana 2012; Fejes 2010; Rasmussen 2009). In addition, special attention was given to the

implications of ALE at the institutional level and to how different sectors of ALE became more active. Equally important was the discussion on the participation in formal, non-formal and informal learning activities, and in vocational, community, popular or citizenship education (Han 2017; Desjardins and Ioannidou 2020; Lee et al. 2008).

The feedback given on the document as a whole, as well as the critical reflections on its recommendations, were recorded from the start (Davies 2001; Green 2002; Alheit and Dausien 2002; Osborne and Edward 2003). The *Memorandum's* long-term effects were also evaluated, mainly with a focus on its political impact for LLL strategies (Dehmel 2006; Hinzen 2011; Lima and Guimarães 2011; Mikulec 2018; Panitsides and Anastasiadou 2015) and on building a knowledge-based society (Jarvis 2004; Jones 2005; Tuijnman 2003). Both positive aspects (Federighi 2013; Mohorčič Špolar and Holford 2014) and negative implications were highlighted, due to the *Memorandum's* rather broad understanding of LLL and a certain lack of precision and pragmatism – which could have created real opportunities for LLL (Bengtsson 2013; Biesta 2006; Billett 2010; Bynner 2017; Regmi 2020). These negative implications contradict the primary role of the document, viewed as a common emancipative good (Boyadjieva and Ilieva-Trichkova 2018; Brine 2006; Eschenbacher and Fleming 2020; Tuparevska et al. 2020).

The impact of the *Memorandum* has generated numerous critical reflections ranging from published articles to special issues (*International Journal of Lifelong Education*), international handbooks (Aspin et al. 2012; Fleming 2011; Jarvis 2009), dedicated books (Lima and Guimarães 2011; Zarifis and Gravani 2014) or book chapters. Even special bibliometric research was conducted (Do et al. 2021; Erdogan 2020) to highlight a distinct research focus on LLL in different parts of the world or globally. Of course, the fact that the *Memorandum* has enjoyed extensive attention and has had such a great impact is not necessarily its own merit, but it demonstrates a policy agenda and a wider concern about shaping LLL and learning societies in the 21st century, which had actually started before the *Memorandum's* publication (Elfert 2015; Pépin 2007). However, the *Memorandum* definitely has the true merit of bringing the European approach to lifelong learning into the international educational arena, harmonising divergent concepts and traditions from the Global North and the Global South (van der Kamp 2004; Elfert 2015), not least with the support of a number of international organisations (Field and Schemmann 2017; Lee and Jan 2018; Lima et al. 2022).

## Topics and key messages

As mentioned above, the presentation of the *Memorandum's* the six key messages follows a consistent pattern: key message title, objective with arguments and explanation, and finally questions for debate. This structured format is typical of a professional political document. While the key messages as such may not have been entirely “new”, the *Memorandum* structured them into a more systematic order (Borg and Mayo 2005). This systematic structure was still being used more than

ten years later by George Zarifis and Maria Gravani to organise their book entitled *Challenging the “European Area of Lifelong Learning”* (Zarifis and Gravani 2014). In the next section, we introduce the *Memorandum’s* key messages, followed by an examination of crucial developments in the educational debate since the *Memorandum’s* publication.

### **New basic skills for all**

The first key message, entitled “*New basic skills for all*” (CEC 2000, pp. 10–12), aims to allow individuals to have permanent access to learning opportunities in order to enable “sustained participation in the knowledge society” (ibid., p. 10). This is a prerequisite for active citizenship and employability in 21st-century Europe. “*New basic skills*” [emphasis added] refer to competences in information and communication technology, languages, entrepreneurship and in social skills, alongside the traditional basic competences, such as the ones related to reading, writing and numeracy, which remain important. The *Memorandum* points out that acquiring these skills is only the first step; “only the beginning of a continuum of learning throughout life” (ibid., p. 11), since permanent changes and requirements at work and in personal life require a high degree of flexibility in individual learning careers as well as in the educational system. Learners are left with the burden of unanswered questions and the responsibility and right to acquire qualifications (Popovic 2014; Kaya 2013). There is also the matter of a shared understanding of basic competences and the assessment of their relevance for various population groups. Another important aspect is the ability to adapt these basic competences to real-world developments with great flexibility (Kaya 2013).

It is surprising to read in the *Memorandum* about competences such as digital skills being regarded as basic competences, with a high impact on individuals of all ages (Schmidt-Hertha and Strobel-Dümer 2014). When the *Memorandum* was being drafted, rapid developments in information and communication technology (ICT) and the range of digitalisation were still a remote reality. In this regard, the *Memorandum* is innovative because it specifies the need to equip individuals of all ages with digital competences, an objective viewed as highly desirable a decade and a half later (ibid.), and even more so another decade later, following the experience of the pandemic. The other basic competences were formulated in more recent debates, like the ones launched by large-scale analyses such as the OECD’s Programme for International Student Assessment (PISA) and their Programme for the International Assessment of Adult Competencies (PIAAC). But extending the demand for these basic competences to all age groups of the population, particularly underprivileged citizens, has been a focused aim in the debate on future educational politics over the past two decades, since LLL was regarded as a way to secure skills and jobs (Federighi 2013) as well as a tool to establish and maintain social cohesion, enabling all citizens to keep up with societal challenges and to become active participants in social life. In other words, LLL was (and indeed still is) about taking real opportunities to participate in social activities (Popovic 2014; English and Mayo 2021; Zarifis and Gravani 2014; CoEU 2021).

Over the two decades following the inception of the *Memorandum*, the development of the “new basic skills” referred to in the first key message mainly revolved around discussions and activities centred on social and digital competences. While the basic competences specified in the *Memorandum* did not change much in the upcoming policy documents, they were better defined in 2006 (CEC 2006a) and revised in 2018 (Alves et al. 2010; CoEU 2021). Social competences became a central element in the European Qualification Framework (EQF) initiated by the European Commission in 2008 (EP and CoEU 2008; CEC 2010; Alves et al. 2010) and implemented by EU member states in the following years.

However, a more critical debate concerning the conceptualisation of competences in ICT occurred in the field of digitalisation. Due to the rapid increase and diversification of digital instruments, competences in all social fields had to be adjusted and restructured, including the field of education. This need to update the notion of citizens’ basic skills became especially clear during the height of the COVID-19 pandemic (2020–2022), when measures to prevent the spread of infection such as lockdowns hindered face-to-face communication. In this context, a European Digital Competence Framework for Citizens (DigComp) was launched in 2013 (CEC 2014), renewed as DigComp 2.1 in 2017 (Carretero Gomez et al. 2017) – an initiative closely related to the *Memorandum’s* sixth key message, which urges that learning must be brought closer to individuals, as emphasised in the specialised literature. The *Memorandum’s* last key message has enjoyed a much wider critical attention than its first key message, which was discussed by the smallest number of publications since the *Memorandum’s* publication. One possible reason for this might be that the creation of basic competences is more closely related to the first part of one’s lifespan or to a specific group of adult learners, such as those with low (or no) literacy skills. However, the *Memorandum* has impacted developments in higher education as well (Sabrià-Bernado et al. 2017).

### More investment in human resources

“*More investment in human resources*” is the second key message (CEC 2000, pp. 12–13). Its objective is “to place priority on Europe’s most important asset – its people” (ibid., p. 12). The *Memorandum* emphasises that achieving this general aim requires individualised solutions by all EU member states and regions. Nevertheless, the *Memorandum* clearly asserts the need for improved incentives such as individual learning accounts, educational sabbaticals, flexible work arrangements or job-related educational opportunities. In this regard, social partners play an important role. The *Memorandum* also raises questions about the relationship between investment and content, the necessity for needs assessment, more tangible and transparent incentives, the interaction between public and private funding and support for enterprises in financing workplace learning and LLL, and the investment in the infrastructure for LLL.

There is limited evidence to ascertain whether there was an increase in investment in human resources, in LLL and in adult education activities in Europe following the finalisation of the *Memorandum*. Similarly, there is no concrete evidence

whether the financial aspect of LLL and ALE was influenced by the *Memorandum's* second key message. A 2013 study on investing in LLL conducted by the (German) Research Institute for Educational and Social Economics (FiBS) and the German Institute for Adult Education (DIE) (FiBS and DIE 2013) points to varying levels of investment across EU member states. According to this study,<sup>5</sup> Denmark, Austria and Sweden topped the list with 1.2% of their GDP, whereas countries like Spain, Australia and Canada were at or below 0.5% (though the authors acknowledge that “this may be due to under-reporting” [ibid., p. 17]), not to mention countries like Romania or Greece, which were investing even less. The difficulty in obtaining clear data in this field arises from the diverse financing models in place. Employers, learners and states (sometimes also NGOs) all contribute to ALE financing in different ways, as emphasised in the *Memorandum's* introductory section which asserts that each country should find its unique pathway (CEC 2007, 2009). Over the past 15 years, the EU has co-financed ALE in a number of member states, particularly after studies on the factors influencing participation found that the financial aspect plays a crucial role (Desjardins and Ioannidou 2020; Rubenson 2019).

However, in placing the burden of learning on individuals, the *Memorandum* fails to emphasise the importance of stronger governmental commitment and responsibility in this regard. This has been criticised by various researchers (Barros 2012; Biesta 2006; Bynner 2017; Dehmel 2006; Fejes 2010; Kauppila et al. 2020; Mikeilatou and Arvanitis 2018; Milana 2014; Regmi 2020; Rubenson 2013; Tett 2014). A better advocacy for investing in human resources, however, could emerge from a “concerted research-based initiative” (CEC 2000, p. 13) providing evidence supporting the benefits of learning, as called for in the *Memorandum's* text. In a way, the *Memorandum* has increased the moral pressure on individuals to become active learners.

Research, primarily via content analysis, shows the steps forward prompted by the *Memorandum* in promoting the need for human resources. This can be done by addressing learning as a form of renewal (Feketéné Szakos 2014), emphasising its role in fostering active citizenship, community cohesion and development (Németh 2010; Lucio-Villegas and Fragoso 2016), and acknowledging its role in future investments. Additionally, extant research also highlights the *Memorandum's* recommendations regarding enhanced or limited opportunities for LLL or higher levels of education among various adult target groups, including older individuals (Formosa 2012), those facing different forms of inequalities (Tuparevska et al. 2020; Kaya 2013), and those striving for access to higher education and/or better employability (Németh 2010; Sabriá-Bernado et al. 2017). Therefore, better incentives and strategies to stimulate the supply and demand aspects of education must be considered (Milana 2014).

<sup>5</sup> The study “map[ped] and analyse[d] key data, the sources, the mechanisms of funding approaches and relevant recent developments with a particular focus on the following countries: Austria, Belgium, Denmark, Germany, Estonia, Hungary, Italy, Netherlands, Romania, Slovakia, Slovenia, Spain, and United Kingdom as well as Norway and Switzerland as EEA countries and – in order to compare Europe’s adult learning policies with those of major competitors – the four non-European countries Australia, Canada, Korea and the USA” (FiBS and DIE 2013, p. 4).

## Innovation in teaching and learning

The third key message, entitled "*Innovation in teaching and learning*" (CEC 2000, pp. 13–15), emphasises the need for more attractive and interactive teaching and learning methods. The objective is to "develop effective teaching and learning methods and contexts" which support lifelong and lifewide learning (ibid., p. 13). However, specialists have pointed out a certain lack of pedagogical understanding here, arguing that the focus should not only be on developing new methods, but also on enabling teachers and educators to use them in a customised way (Egetenmeyer and Bettinger 2014). The role of teachers needs to be redefined to emphasise facilitation, moderation and support for learners in improving their capabilities to acquire and use new knowledge. The *Memorandum* raises questions regarding the use of e-learning, the examination of transnational projects, the qualification of teachers and trainers, and the focus of educational research on teaching and learning processes.

The development of innovative teaching and learning over the two decades following the *Memorandum's* inception has been closely linked with the development of digitalisation in educational settings, as already mentioned above. The use of media as a means of teaching has become more and more popular in the realm of ALE. Formats such as online learning, blended learning and other forms of open education, as well as digitally embedded pedagogical solutions and materials, have increased quantitatively and qualitatively. Following the experience of the COVID-19 pandemic, many traditional approaches to teaching and learning have been transformed into media-based settings, with a wide adoption of open educational resources (Eschenbacher and Fleming 2020).

The *Memorandum* is rather vague regarding the qualification of teaching staff engaged in ALE, giving no concrete suggestions for addressing future lack of qualification (Sava 2014, p. 149f.; Egetenmeyer and Bettinger 2014). However, subsequently published documents referring to the *Memorandum* and transferring its key messages into action plans suggest that ALE professionals can enhance their status and improve their competences. In documents such as "Making a European Area of Lifelong Learning a Reality" (CEC 2001), the Communication "Adult learning: It is never too late to learn" (CEC 2006b), and the related Action Plan "It is always a good time to learn" (CEC 2007), various recommendations stress the need for qualified ALE professionals and the need to develop wider academic provision for both initial and ongoing professional development (Nuisl and Lattke 2008). These professionals are not only teachers but also managers and administrators of educational institutions, and counsellors (Volles 2016).

In order to address this issue, the EU launched two projects which aimed to identify the desired competences for ALE professionals (Research voor Beleid 2008, 2010) and introduced dedicated programmes like Grundtvig and Leonardo DaVinci,



which were later transformed into Erasmus+ programmes.<sup>6</sup> These programmes aimed to enhance qualifications and secure more opportunities for continuous professional development in the field of ALE (Egetenmeyer and Nuisl 2010; Nuisl and Lattke 2008). In the decade leading up to 2020, efforts to improve professionalisation systems for academic staff continued, both at the university level and in the development of national frameworks, such as those already in place in countries like Germany, Austria and Switzerland. Academic pathways towards professionalisation in ALE received a lot of attention in scholarly debates. However, direct links with the *Memorandum* are rather limited, possibly due to the *Memorandum's* somewhat ambiguous and inconsistent recommendations. In addition, convincing solutions for the professionalisation of ALE staff on a European and international scale are less articulated or rather difficult to implement (Egetenmeyer and Nuisl 2010; Nuisl and Lattke 2008).

### Valuing learning

The fourth key message (CEC 2000, pp. 15–16) is about “*valuing learning*”. The objective is to “[e]nsure that everyone can easily access good quality information and advice about learning opportunities throughout Europe and throughout their lives” (ibid., p. 15) by improving the methods for validating participation in and the success of learning, particularly in the fields of non-formal and informal learning. Once again, the threefold typology of formal, non-formal and informal learning (CEC 2000, p. 8) is clearly applied. This key message suggests that whereas formal learning is typically acknowledged by certificates, non-formal and informal learning, which can be both quantitatively and qualitatively more important, is not appropriately accredited or explicitly recognised. According to the *Memorandum's* recommendations, all types of learning must be made visible and certified. Therefore, there is a need to develop and apply a coherent system for the accreditation of prior and experiential learning (APEL), which takes into account different investments in learning. This system could be compared to the European Credit Transfer System (ECTS)<sup>7</sup> (Merrill and Hill 2003). The topic of validating learning dates back to the early 1990s and is also linked to the demand for quality in pedagogical contexts, an extremely urgent matter at the time. It is the merit of the *Memorandum* which elevated the validation of learning to a higher priority as part of the main activities for the future.

Indeed, in 2004, the European Commission launched a draft on the validation of non-formal and informal learning (EC 2004), which was followed by a recommendation from the European Council on the same topic in 2012 (CoEU 2012). This

<sup>6</sup> The EU's GRUNDTVIG (adult education) and LEONARDO (vocational education and training) programmes were part of the European educational programme of lifelong learning (LLP 2007–2013). In 2014, LLP was replaced by ERASMUS+ (2014–2020/2021–2027). For more information, visit <https://erasmus-plus.ec.europa.eu/about-erasmus/history-funding-and-future> [accessed 13 March 2024].

<sup>7</sup> The European Credit Transfer System (ECTS) helps university students to have their academic qualifications recognised when they move between countries. For more information, visit <https://education.ec.europa.eu/education-levels/higher-education/inclusive-and-connected-higher-education/european-credit-transfer-and-accumulation-system> [accessed 13 March 2024].

recommendation asked EU member states to develop coherent national concepts and systems for validation and to further implement them while respecting the principle of subsidiarity (EP 2023). Many European states began to develop and, in some cases, monitor and implement such validation systems, with the European Centre for the Development of Vocational Training (CEDEFOP) playing an important role in these attempts (CEDEFOP 2023). In many EU member states, such as Germany, the Netherlands, Denmark, Portugal, France and Romania, the validation systems have been integrated into the educational setting, often with the concept of “competence” at its centre. In the field of ALE, “validation professional” (ibid., p. 30) became a new job description. The acknowledgement of learning achievements by the identification, documentation and validation of prior learning and acquired competences in non-formal or informal learning contexts has become a consolidated learning pathway. There has been dedicated research aimed at improving the quality, transparency and credibility of validation systems (Andersson et al. 2013). However, one challenge also highlighted by the *Memorandum* remains, namely the need for an enhanced “dialogue between the Social Partners, enterprises and professional associations ...[,] in order to raise mutual confidence in the validity and utility of more diverse forms of recognition” (CEC 2000, p. 16). This is due to the fact that in several countries, various training providers, particularly universities, still hesitate to implement APEL systems (Slowey and Schuetze 2012).

Internationally, the issue of APEL has enjoyed increased attention and development, partly due to the activity of UNESCO, which launched its own guidelines for the recognition, validation and accreditation of non-formal and informal learning (RVA) and provided dedicated tools, instruments and related expertise (UIL 2012; Singh 2015). However, the challenge of removing obstacles and smoothly integrating learning pathways demands further research and the development of solutions which will increase the credibility and portability of alternative certification systems. It also calls for alternative options for learning (Sabrià-Bernadó et al. 2017). The issue of APEL has become a distinct concern beyond the scope of the *Memorandum*, as evidenced by the rather limited number of dedicated publications.

## **A re-evaluation of guidance and counselling**

The fifth key message in the *Memorandum* calls for a “*re-evaluation of guidance and counselling*”, and career orientation (CEC 2000, pp. 16–18). The aim is to secure easy access to high-quality information and counselling services about learning opportunities across all of Europe and during one’s lifetime. This objective aims to match the increasingly individualised profiles of learners, the higher level of self-direction in learning pathways, and the increasing number and variety of educational offers and modules. The *Memorandum* states:

information and advice on “what to do next” at several times in our lives ... is an integral part of planning and carrying through a life project as an ongoing process, in which paid work is but one component (ibid., p. 17).

Therefore, the counselling service must be available for everyone, irrespective of whether they need professional or personal guidance. Counselling must accompany individuals on their own pathways and help them to make informed decisions. This should be proactive, reaching out to people, integrative, often referred to as a “one-stop shop”. This approach should include both e-learning and face-to-face provision. Counselling services must improve in terms of quantity and quality at the local and regional levels, as they are delivered by professionals who have themselves benefited from dedicated pre-service education. In the end, the competences and qualifications of career and educational counsellors need to be adjusted in compliance with the needs mentioned above.

In the years since the publication of the *Memorandum*, only a relatively small number of contributions aimed at improving the counselling system, especially when compared with other fields. This is in spite of the concepts for counselling services which have been developed as active measures for inclusion on the labour market, customised for various target groups, such as youth not in education, employment or training (NEETs). These services can be integrated into the workplace or exist in European and national networks of professional counselling specialists (Plant and Turner 2005; Ruffino 2011). However, such services are not yet sufficiently widespread, and the number of professionals in this realm is still quite limited, even where these services are part of larger initiatives, such as APEL services (Paixão et. al. 2014; Ruffino 2011).

### **Bringing learning closer to home**

The sixth and final key message (CEC 2000, pp. 18–20) points out the need to bring learning “*closer to home*” in a particular sense. The aim is to develop and enlarge educational offerings on people’s doorsteps, where they live and work. Locally, this means providing infrastructure like transportation, social support and childcare. The *Memorandum* stresses the fact that LLL can be an important factor for innovation in places where people come together regularly, such as community centres, shopping centres, schools, libraries, museums, churches, parks and railway stations. The *Memorandum* raises important questions, including how schools can be transformed into local learning centres, how local learning partnerships can be developed, and how learning cities and learning regions can be developed.

Over the past two decades, this key message has been interpreted in different ways. There are three main interpretations and corresponding actions: outreach work used as a mobilisation strategy aimed at increasing participation (Hake 2014); community learning centres; and the concept of learning cities and learning regions (Longworth 2006; Németh 2010). In particular, the UNESCO Institute for Lifelong Learning (UIL) has played an important role in formulating the third interpretation over the past 10 years, collecting models, supporting initiatives and granting global awards. Under UIL’s coordination of the Global Network of Learning Cities

(GNLC),<sup>8</sup> and its role as a clearinghouse which brought together numerous shared experiences and mutual learning solutions, the concept of a learning city or a learning region has become well-known worldwide (Reghenzani-Kearns and Kearns 2012). This has popularised the vision of a learning society. The concept of learning cities and regions is proving to be particularly relevant for ALE and LLL, as it integrates perfectly into the societal dimensions of people's lives, creating an additional benefit for all involved. Consequently, local strategies for LLL have been reinforced, encouraging various institutional providers to build up stronger partnerships (Németh 2010).

Additionally, with a call to use “incentive schemes and other support measures” (CEC 2000, p. 19) to stimulate inclusive partnerships and wider learning opportunities tailored to the needs of adult learners, further indicators have been developed to measure the quality of ALE systems, including the specific aspect of local accessibility (Buiskool and Broek 2014). The evaluation of the quality of ALE provision, the development of frameworks for successful policy measures to stimulate LLL participation, and the ongoing monitoring of participation rates and profiles have all developed into policy initiatives (CEC 2009) which can be traced back to the core message of the *Memorandum* and its primary recommendations regarding the mobilisation of resources for LLL.

However, the core of this key message lies in using ICT to make educational offerings more accessible to students. Its objective is not only to “[p]rovide lifelong learning opportunities as close to learners as possible, in their own communities” but to “support [this] through ICT-based facilities wherever appropriate” (CEC 2000, p. 18). Over the past two decades, online learning provision has become more familiar to learners, with a significant impact on informal learning. In fact, the provision of LLL has been largely influenced by technological advancements, both for online and blended delivery and for more engaging and interactive teaching, learning, communication and evaluation practices. Therefore, more research efforts have focused on: measuring the learning occurring in all contexts (Tuijnman 2003); reducing inequalities in access to learning through ICT tools for communication and learning access (Tuparevska et. al. 2020); evaluating the utilisations of ICT for teaching and learning purposes (Demirbilek 2009); and highlighting the potential of and emerging trends in its educational use (Billett 2010).

Section five of the *Memorandum*, labelled “Mobilising resources for lifelong learning” (CEC 2000, pp. 20–23), mentions one additional aspect, namely the “[d]evelopment of indicators and benchmarks”, though this is not explicitly defined as a key message in its own right. The *Memorandum* states that “Indicators that reflect the full meaning of LLL as defined in this Memorandum are not presently available” (ibid., p. 20). The development of suitable indicators is a crucial prerequisite for implementing the open method of coordination and establishing common benchmarks for guidance, legitimation and policymaking (Tuijnman 2003). The *Memorandum* presents certain indicators in Annex II (labelled “The scope for

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<sup>8</sup> Launched during the first International Conference of Learning Cities held in Beijing in 2013, the Global Network of Learning Cities (GNLC) meanwhile has 356 members in 79 countries. For more information, visit <https://www.uil.unesco.org/en/learning-cities> [accessed 13 March 2024].

developing indicators and benchmarks on lifelong learning”, *ibid.* pp. 31–36), which are related to its key messages, such as participation rates, time spent “in education and training” (not learning!) (*ibid.*, p. 34), sources of financial support, and the transparency of learning opportunities. The *Memorandum* suggests that the optimal solution would be the design of a dedicated adult learning survey. Indeed, the *Memorandum*’s proposal did prompt the development of the Adult Education Survey (AES; see footnote 3), which ran its pilot survey in 2007. Due to this survey, it became possible to collect *data* on adult participation and non-participation in LLL. It is conducted by each EU member state, under the coordination of the statistical office of the European Union (EUROSTAT), and the data on LLL participation are incorporated annually into the European Education and Training Monitor.<sup>9</sup> Based on the AES, it is now possible to compare the state of adult education and LLL in all EU member states, offering valuable information for improvement and development in education.

## Conclusions

Generally speaking, it can be asserted that the *Memorandum on Lifelong Learning* has been the most central document on LLL in the European Union since its inception in 2000. It became a fundamental document for ALE in subsequent years, given the amplitude of the follow-up developments and the numerous citations it received in academic literature. To identify the extent to which the *Memorandum*’s key messages were reflected in European and international debates during and after its creation, we conducted a scoping review, highlighting the vivid discussions and analyses it stimulated.

Through a soft and open discourse, the *Memorandum* gained a significant degree of recognition all over Europe, resulting in its substantial influence on the future development of ALE in Europe and in shaping new policies and research agendas. The broad and intensive discussions around the *Memorandum* in EU member states and candidate countries in 2000 raised awareness about the importance of this educational field and led to a shared understanding, ranging from a common terminology to similar aims and objectives. While it is rather challenging to directly correlate the *Memorandum* with specific developments, many topics, measures and innovations which emerged over the past two decades seem to be in line with the *Memorandum*’s approaches and its six key messages.

The actions of the EU itself influenced the impact of the *Memorandum* in the years following its inception. In 2001, the European Commission released the seminal document “Making a European Area of Lifelong Learning a Reality” (CEC 2001), which is closely aligned with the *Memorandum*’s key messages and incorporates the amendments from member states. While modifying some of the *Memorandum*’s positions, this document particularly emphasised the importance of general and political education and learning, in contrast to the *Memorandum*’s emphasis on

<sup>9</sup> For more information about the European Education and Training Monitor, visit <https://education.ec.europa.eu/about-eea/education-and-training-monitor> [accessed 13 March 2024].

employability. The European Commission itself, with its instrumental capacities, put into practice a few of the *Memorandum's* key messages. For instance, the budget lines of programmes like Leonardo, Grundtvig, Socrates (the predecessor of LLP) and Erasmus in the ensuing years illustrate this aspect. Additionally, further policy papers, such as “It is never too late to learn” (CEC 2006b) and its corresponding action plan, “It is always a good time to learn” (CEC 2007), followed the *Memorandum's* key messages. However, this article may not cover all the references to the *Memorandum* in the follow-up policy documents and measures since our main focus has been on mentions of the *Memorandum* in the scholarly discourse. Further research could be undertaken to provide a more comprehensive analysis of the *Memorandum's* influence on LLL. (Alves et al. 2010).

In a broader sense, albeit somewhat challenging to prove empirically, the *Memorandum* inspired discussions on ALE towards a more coherent vision of the various sectors of education (Zarifis and Gravani 2014). It introduced new ideas which encouraged viewing all pedagogical institutions as being integrated in a unified system, and viewing general and vocational education as two sides of the same coin. The *Memorandum* also painted the picture of a European adult education, traversing national boundaries and pointing out the core values of learning for personal emancipation, economic development and societal growth. In addition, it influenced further debates in the field of LLL, particularly revolving around the benefits of LLL, enlarging the view beyond education to areas such as health, sustainability and quality of life.

It seems fair to assume that the *Memorandum* and its key messages influenced the educational offerings and demand in various states, extending beyond ALE to higher education (Sabria-Bernardo et al. 2017). The *Memorandum* had a strong impact on fostering international cooperation, not only in the EU, where it implemented a common reference concept (van der Kamp 2004), but also on a wider scale. In fact, it can be said to have shaped the formation of a European identity within the global discussion on LLL.

Moreover, the literature published by scholars outside Europe highlights how the *Memorandum* inspired and reflected discussions on LLL in countries all around the globe. This proves the far-reaching influence of the *Memorandum* even in non-European countries. International organisations, such as UNESCO, have actively contributed to harmonising the understanding and approaches to LLL, further proving the global impact of the document.

The *Memorandum* had different impacts among EU member states; a systematic analysis of these nuances was beyond the scope of our article. National debates likely took place in national languages and were analysed by national scholars, contributing to the international debate to a varying extent. However, what is noticeable in the international debate is that scholars in EU candidate countries in Eastern Europe have contributed less to the academic analysis of the *Memorandum's* implications for their respective countries compared to their colleagues from Greece, Spain, Portugal and the Nordic countries. In Northern and Western Europe, such as the United Kingdom, the Netherlands and Scandinavia, the impact of the *Memorandum* is very visible. This is also due to the fact that in these countries the *Memorandum's* key messages aligned with an already developed education system. The idea and concept

of APEL, for example, became prominent in the Netherlands, basic competences became popular in Sweden, and a ten-year programme for “learning regions” (partly financed by the EU) was launched in Germany in 2001. Further research is needed to more closely examine the influence of the *Memorandum* in various countries, to analyse national policy documents in a timeline to trace their origin (in the *Memorandum* and its follow-up papers), and to evaluate the adjustment of aims, measures and programmes due to national needs in education over the years.

One follow-up to the *Memorandum*, despite not being included in its key messages and recommendations, is the development of benchmarks, indicators and statistics. The European Adult Education Survey (AES) now provides quantitative data for political initiatives and comparisons. The role of this instrument and others (such as financing benchmarks and participation indicators) in the development of ALE in the European Union cannot be overestimated.

Another development in Europe which can be traced back to the *Memorandum* is the increased qualification of professionals in the field of academic development (AD). In the late 1990s, adult education teachers were almost overlooked, with the concept of self-directed learning and the theory of constructivism seemingly making them less visible. The *Memorandum* played a crucial role at that time by underlining the need for qualified staff to maintain quality in ALE in Europe (Nuisl and Lattke 2008; Sava 2014). Since then, the focus on the quality of adult learning in Europe has been closely linked to the improvement of the staff qualification in this field. However, looking back on the performance of European adult education in the first decade(s) of this century, one might argue that the development of ALE was more visible at the conceptual and policy formulation stages than at the levels of implementation and impact. Over these past two decades, the participation rate of adults in lifelong learning was rather modest, with only very little increase over the years. It is likely that the vision of the *Memorandum* was too optimistic in this sense.

Indeed, not all developments in ALE over the past 20 years can be attributed to the key messages of the *Memorandum*. During this period, other important documents were launched, such as the United Nations 2030 Agenda in 2015 with its Sustainable Development Goals (SDGs), of which SDG 4 (Quality education) has become one significant reference point (UN 2015). This is true even in the case of those developments explicitly emphasised in the *Memorandum*. One example is the need to increase participation, which was actually only identified in different political contexts from 2010 onwards. Even though the scholarly debate did not always find it easy to identify papers analysing the actions and the impact of the SDGs on ALE and societal development, the language and terminology used in the 2030 Agenda are a reminder of the concepts and themes of the *Memorandum*. For instance, UNESCO’s recently launched handbook, *Making lifelong learning a reality* (UIL 2022), which extensively covers the ways in which the SDGs can be achieved, recalls the follow-up document to the *Memorandum* “Making a European Area of Lifelong Learning a Reality” (CEC 2001).

While the *Memorandum* is frequently referenced in a number of articles, books and papers and serves as a foundational document, its influence in helping to implement concrete actions and programmes seems rather limited. In fact, we found only



about one third out of the 172 selected articles we included in our scoping review to feature distinct indications of having been inspired by the *Memorandum's* text and key messages. There is not always clear proof that concrete actions, decisions or programmes were prompted by or dated back to the *Memorandum*; they are more likely linked to national needs and priorities. The *Memorandum* can be viewed as a theoretical framework rather than a textbook for fieldwork. However, it has contributed to shaping a framework for European ALE policy and a historical reference for reflection on what has been done and must be done in education and particularly in adult education learning.

Considering the developments reflected in this scoping review, it can be concluded that the *Memorandum* has had an impact and continues to exert an influence on the international scholarly debate, as it is still a source of reference in recently published papers. If in the first decade following its publication the analyses mainly tried to critically examine the implications of the *Memorandum's* key messages, during the second decade, the focus shifted to the long-term impact of its recommendations. This was in line with the *Memorandum's* goal of contributing to framing a knowledge-based economy in Europe by 2010:

the move towards lifelong learning must accompany a successful transition to a knowledge-based economy and society ... [The] purpose [of this Memorandum] is to launch a European-wide debate on a comprehensive strategy for implementing lifelong learning at individual and institutional levels, and in all spheres of public and private life. ... The coming decade must see the implementation [*sic*] of this vision (CEC 2000, p. 3).

The publications in the second decade were more numerous than in the first decade. However, it was not our aim in this scoping review to look at the changes in the scholarly debate. It would be fruitful to analyse the evolution of the latter, both nationally and at European and international levels, exploring the change of views since the *Memorandum's* publication and the increasing use of empirical data. In this regard, it could be beneficial to create closer interdisciplinary collaboration between the fields of political and educational sciences.

## Declarations

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**Ekkehard Nuissl** Prof Dr habil Dr h. c. mult., University of Kaiserslautern (Germany) served as director of the Institute for Empirical Educational Research AfeB in Heidelberg (1974–1988) and as director of Hamburg Folk High School (1988–1991), connecting his scientific research to the practical field. In his capacity as director of the German Institute for Adult Education (1991–2011), he successfully combined scientific, practical and political interests. His activity in these institutions has always been coupled with his pursuit of an academic career as a Full Professor at several universities in Germany (Hanover, Marburg, Duisburg, Essen) and as a Visiting Professor at several international universities. Since 2011, Professor Nuissl has been teaching at the University of Kaiserslautern. He has chaired national and international associations and conferences, and acted as a consultant for governments and the European Commission. In 2006, he became a member of the International Adult and Continuing Education “Hall of Fame”. Since 2016 he has been a research fellow of the UNESCO Institute for Lifelong Learning (UIL) in Hamburg. He is Editor, Co-Editor and member of several journals and scientific boards. His most recent publications include *Erwachsenenbildung. Eine Einführung in Grundlagen, Probleme und Perspektiven* ([Adult Education: An introduction to basics, problems and perspectives], co-authored with Rolf Arnold and Matthias Rohs, WBV 2017), *Kultur aneignen* ([Acquiring cultural identity], co-authored with Ewa Przybylska, Schneider/WBV 2017) and *Wörterbuch Erwachsenen- und Weiterbildung* ([Adult and continuing education dictionary], co-authored with Rolf Arnold and Josef Schrader, 3rd, completely revised edn, Verlag Julius Klinkhardt 2023).

**Simona Sava** Prof Dr habil, has been teaching at West University of Timisoara since 1997 and became Full Professor in 2009. In 2003, she received her PhD in distance and online education from the University of Bucharest, and in 2015 she habilitated there in the field of lifelong learning policies. She was director of the Romanian Institute of Adult Education (IREA) from 2000 to 2013. Her main research topics are professionalisation from a lifelong learning perspective; teacher education; educational policy; educational management; learning communities and learning cities. Her publications include more than 80 studies and articles, and she has authored, co-authored and edited more than 20 books. She is a member of the International Adult and Continuing Education Hall of Fame.