

Institutionalization of Lifelong Learning in Europe and East Asia: from the Complexity Systems perspective

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Abstract East Asia shows newly emerging experiments in lifelong learning that contrast with European experiences. The concepts and ideas share a similar platform, while the trajectories of institutionalization reveal great differences. It is because the idea of lifelong learning was coined by international agencies, like UNESCO, to share, it rather shows divergent mode of institutionalization in different contexts. In this article, I intend to grasp the particular characteristics of ‘institution formation’ in lifelong learning practices, especially shown in East Asian countries, including the Republic of Korea, Japan, and China. In so doing, I adopt social systems theories in interpreting the phenomena. Education is presumed to be a social system, or ‘autopoiesis’ that functionally differentiates and expands itself by self-referential reproduction. In this context, lifelong learning is a relative newcomer with new frameworks and ideas, which sometimes conflict with traditional education, and institutionalizes itself by competing the contested terrains of the system, most of which are pre-occupied by early sectors of education. In this paper, I focus on how the ‘idea’ of lifelong learning embodies into the system, secures its own education spaces, and keeps expansive reproductions as a part of the education system in general.

Keywords Lifelong learning system · Institutionalization · Self-referential systems · Korea · Japan · China · Autopoiesis

Introduction

“What is wrong with the term adult education? Why did Korean people replace it by lifelong learning?” It was a sudden question that John Dirx, an American professor of adult education, tossed when climbing the mount of Piazzale Michelangelo, Florence. Good question. I never thought that way. He was right, in a sense that the notion of adult education is still dominantly used in the USA, like any other countries, while the term lifelong learning implies nothing but the personal learning of senior citizens. In Korea, everything has changed over the threshold of the new Millennium: the notion of adult education was suddenly replaced by lifelong education; Lifelong Education Law was enacted at a national level; local municipalities declared learning cities with lifelong education ordinances and program delivery systems; not much for the employability issues of neo-liberalism, but rather for social inclusions and community citizenships; the provision of education programs prefer liberal arts learning than vocational education and trainings; higher education institutions adopt new programs for non-traditional adult learners, in the name of “lifelong education colleges.” The changes were quick and sudden, stabilized within a decade. Having the mysterious phenomenon caught in the eyes of an American scholar, it is no wonder that a question of ‘what happened in this country?’ was raised.

The concept of lifelong learning, being widely spread out, has conceived multiple variations in practices and institutions. It was unevenly dispersed and heterogeneously practiced. In Europe, it fabricated a supranational memorandum on lifelong learning, while it still refers to nothing but adult learning of the senior citizens in North America; in some continents, lifelong learning is a far and vague concept, hard to practice, or simply non-existent.

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Among many, the phenomenon in East Asia stimulates enough curiosities. Ogawa delineates lifelong learning in Japan with *neo-liberal characteristics* (Ogawa 2009) or Han highlights the context in Korea as *learning capitalism* (Han 2008), which are commonly found in Europe and elsewhere. Whereas, Okumoto contrasted UK and Japan with ‘liberalism’ and ‘quasi-communitarianism’ (Okumoto 2008, p. 183).” Surely East Asia shares common characteristics that contrasts from others, while it shows inner diversities within the member countries. My first aim in this article is to take a snapshot of the lifelong learning practices of East Asia, especially on the process of institutional formation, and compare it with European practices.

My second aim is to explain the institutionalization process as a situated process of self-organizing reproduction. Lifelong learning has not been simply ‘invented’ from the West, and mechanically ‘assembled’ in Asia. It was instead ‘cultivated’ in each of its unique soil, by interacting with peculiar environments. To me, how lifelong learning has established, practiced, and institutionalized in Korea and other East Asian countries reminds the image of ‘self-organizing complex system’ or ‘*autopoiesis*.’ The recently emerging complexity theories can presumably help capturing this phenomena as a tentative theoretical model.

Recently, complexity theories seem to successfully supersede the former correspondence theories that have been mostly expedient in theorizing the development of educational sectors (Baets 2006; Davis and Simmt 2003a; Fenwick 2003; Mason 2008). The education system, serving a social function as collectives of living human beings, is much like a living creature that forms one’s boundaries by self-referential reproduction, not by direct interventions from outer forces. The recent theories of systems approach, indebted to Maturana (Maturana and Varela 1998; Maturana 1981) or Luhmann (Luhmann 1984/1995, 2002; Qvortrup 2005; Seidl 2004), provide a meaningful epistemological turning point to re-conceptualize the whole mechanism. Human civilization in general, from this perspective, and education, in particular, have been practiced to create their own functionally operating territories and emerged as a super-stabilized social system. Lifelong learning is one of the latecomers that follow the second generation of the evolution in education system.

Lifelong learning has rapidly institutionalized itself in some regions of the world, surely in Europe, since the 1990s. East Asia was another example that showed secure institutionalization in lifelong learning, even up to forming a sub-system of education. Overall, a ‘system’ is something that is composed with several institutionalized bodies being interconnected, which enables to stabilize any arbitrary or ad hoc activities and interactions into sustainable entities. My interest in this paper is to trace how the lifelong

learning system, whatsoever, has emerged and developed to secure its own boundaries in practice.

Lifelong learning, by the way, is a comprehensive and integrative framework that is supposed to preside in the highest layer of the conceptual stratification, rather than a partial sector of education. It claims simply ‘all human learning that is life-long, life-wide, and life-deep,’ and requires ‘revolutionary changes’ by clashing with traditional schooling and universities. It is not like ‘special education,’ for example, that can claim an exclusive new space in the preoccupied domain of education system. It is interesting to observe how the ‘overwhelmingly comprehensive body of idea’ could sneak into the pre-structured system of education in Europe and Asia.

Education as complex system

Institutionalization in complex system

Durkheim says, “institutions are profound external sources for the regulation of human conduct and the stabilization of social structures (Bidwell 2006, p. 34).” An institutional lens is a general method to understand the nature social behaviors and structures, and new institutionalism, among many, is one of the attempts. The basic premise of the new institutionalism is that “large institutional complexes such as education, and the practices they give rise to, are *contingent* and *contested* (Meyer and Rowan 2006, p. 3).” In short, institution is something that has been selected, and in this process, someone’s interests might be best served by that selected arrangement. The approach, however, still limits the whole mechanism under the framework of political contestation and arbitrariness. The process of institutionalization, from my perspective, is far more complex than merely a matter of power contestation between the stakeholders. This is the exact spot where the theory of complexity intervenes.

Complexity is something that recent studies pay keen attentions. An OECD publication declares that “Complexity in education systems is on the rise (OECD 2016, p. 18).” Education system is increasing complexity in itself, according to the publication, with the characteristics of (1) multi-level systems (local, regional, national in many countries) and alignment is a major challenge, particularly in those most decentralized; (2) increasingly diverse—both in terms of the demographics of the population (of students, of teachers, and communities) as well as the values and identities; (3) a growing number of stakeholders who are increasingly vocal about their wants and desires, not only for themselves and their children, but for the systems as a whole; and (4) a field with strong a priori beliefs, strongly

tied both to our identities and our experiences (OECD 2016, p. 22).

Complexity is a key characteristic that a system possesses, and complexity theory is a theory about a system that learns, expands, and changes through a self-organizational process. The beauty of the theory comes from a few keywords, like autopoiesis, fractal, self-referential reproduction, and up to a 'complex learning system' (Baets 2006; Capra 2002; Davies and Ellison 1997; Luhmann 1984/1995, 2002; Miller and Page 2007).

Niklass Luhmann's social systems theory helps much on constructing the theory of education as complex systems perspective (Kolenc 2012; Qvortrup 2005). According to him, society is the social system, which "includes all social operations and excludes all others" like economy, law, science, politics, education (Vanderstraeten 2004, p. 255). Here, the 'functional differentiation' is key to understand the nature of modern society, and "the educational system is one of these functional systems (Kolenc 2012, p. 241)."

By the way, the functionalities are not entirely determined by external material conditions or competitions, but rather by internal self-referential codes.

Social systems are higher-order systems organized in such a way that their reproduction is governed by the reproduction of proper social units and not by the reproduction of the units that characterize their underlying material bases (Poli 2010, p. 17).

Luhmann continues that although social systems are not entirely independent from a supporting material basis, the reproduction of the higher system does follow its own relational laws, once such a basis has somehow been given. It is a process of 'autopoiesis' that was originated from biological contexts by Maturana and has set up in the sociological context, though the two theorists are still in debate on the applicability to sociological extension of the concept.

The notion of 'self-referential system,' or 'autopoiesis' as a translation of the term, is the key notion that comes from Complex Systems Theories, proposed by Maturana and Varella in a biological context, and later Luhmann or Capra as an application to other realms (Davis and Simmt 2003b; Jackson 2007; Luhmann 1984/1995, 2002; Peters et al. 2011; Poli 2010; Qvortrup 2005; Seidl 2004). Autopoietic systems, also sometimes translated into 'self-organizing systems,' are defined as networks of productions of components that (1) recursively, through their interactions, generate and realize the network that produces them, and (2) constitute, in the space in which they exist, the boundaries of this network as components that participate in the realization of the network. (Maturana 1981).

Luhmann explains in his book *Social System* about the concept of a self-referential system as follows:

The theory of self-referential systems maintains that systems can differentiate only by self-reference, which is to say, only insofar as systems refer to themselves (be this to elements of the same system, to operations of the same system, or to the unity of the same system) in constituting their elements and their elemental operations. To make this possible, systems must create and employ a description of themselves they must at least be able to use the difference between system and environment within themselves, for orientation and as a principle for creating information (Luhmann 1984/1995, p. 9).

To continue, Luhmann says "the concept of self-reference designates the unity that an element, a process, or a system is for itself (Luhmann 1984/1995, p. 33)" and that "the system draws its own boundaries by means of its own operations, that it thereby distinguishes itself from its environment, and that only then and in this manner, can it be observed as a system" (Luhmann 2002, p. 63)." In this sense, at the later stage, "systems are operationally closed, and they rely entirely on internal operations (Luhmann 2002, p. 64)." As a consequence, in the system, there is nothing but the system's own operation (Luhmann 2002, p. 70)," or as Qvortrup says, *it is the self-reference of a system that makes it possible for it to establish contact with its environment, while also preserving itself as a system.* (Qvortrup 2005, p. 7)"

A complex system has a few fundamental characteristics, and 'fractal' is one of the useful concepts. It refers to the preserved memory of the given structure, which creates a nested structure of multi-layered systems, from a tiny and simple system up to a larger and more complex system. Self-organizing system reproduces the 'fractals,' and the fractals represent self-references that guarantee the originality of the nature. Davies et al. provides a suitable example of the fractal concept.

in terms of brain organization, neurons cluster minicolumns, minicolumns into macrocolumns, macrocolumns into cortical areas, and cortical areas into the cerebral hemispheres. Each of these levels of organization has its own particular coherence, and is simultaneously a subsystem of a grander learning agent, a learning agent, and a collective of learning agents. Subsequent nested, overlapping, and interlaced systems include social collectives, disciplinary realms, legal systems, economies, cultures, species, and the biosphere (Davis et al. 2008, p. 86).

Considering institutionalization as a process of transforming shared ideas and values into a system routines, the system surely is something that draws its own boundary by means of its own operations, and it distinguishes itself from

its environment. The characteristics it differentiates from others is, needless to say, a functionality. The system is the interconnection of the ‘functions’ that embodies the shared idea into practice. The modern society is a ‘functionally differentiated society,’ as Luhmann asserts, and “each functional system is operationally closed, being autonomous in fulfilling its function and having its own structures (Poli 2010, p. 28).” Subsystem is each functional society that can be observed based on its own function. Luhmann distinguishes, by applying his own concepts, the whole social system with several subsystems: the legal system, the system of science, the system of economy, the political system, the system of mass media, the system of art, and the system of religion, and lastly the system of education (Luhmann 1984/1995, 2002). According to him, ‘education’ is a separated social function, and has its own system’s territory that is “operationally closed.” In this respect, education is regarded as a ‘self-organizational system that refers mainly to itself in its expansion and reproduction.’

Here, I do not adopt the notion of a self-referential system as a *theory*, but rather as an *epistemological platform*. Thus, the framework of social systems here is not a problem to be empirically ‘proved,’ but rather a theoretical and conceptual model for clutching separate shapes and relations put together as a cluster of theorization. This chosen perspective will help understand lifelong learning in a social process of differentiation, or being differentiated from, but closely interconnected with the traditional education system.

Now, having said that education is premised as a social system that reproduce its functionality by self-organizing process, Mason (2008) applied the perspective in explaining the complexity of school-level units of organizational changes. He states,

The paper posits the notion of inertial momentum as the conceptual link between the principle of emergent phenomena as developed principally in the natural sciences and the notion of socio-historical change in human society. It is argued that educational and institutional change is less a consequence of effecting change in one particular factor or variable, and more a case of generating momentum in a new direction by attention to as many factors as possible (p. 35).

Also, Davies and others brought the framework to explain the complexities in classroom activities, especially in his mathematics education. He asserts that “a complex system is a system that learns” (Davis et al. 2008, p. 78), where learning is understood as an “adaptive behavior of phenomena that arise in the interactions of multiple agents (Davis and Simmt 2003a, p. 137).” It can be a learner, a learning organization, an education system, a learning nation, etc. In

order to figure the images, he brought some signals like far-from-equilibrium, expansive growth, fractal forms, power law distribution (Davis et al. 2008, pp. 82–89).

Complex unities maintain their coherences without the help of a supervisor, overseer, director, or master organizer. They are self-organizing and self-maintaining... In this sense, learning a constant restructuring of internal relations in order to maintain sufficient coherence.... what is learned is determined by the system, not by the event that triggers the learning (p. 80).

Or, as Fenwick said,

Complex system emerges in unpredictable patterns that often defy attempts to control and direct, and it cannot be explained with any distinctive causations (Fenwick et al. 2011, p. 19).

Lifelong learning, in this context, can be presumed to evolve as a self-organizing system. It utilizes external sources to stabilize the idea of ‘lifelong and lifewide learning’ to be referred, in forming the relevant institutions and organizations, and the secured stabilities in turn being supported and legitimated by the ‘functionality’ of the system. In case of lifelong learning system formation, it is the idea of ‘lifelong and lifewide learning’ that is the sole function to be reproduced, and the ‘self-referential functionality’ produces fractal units of components, through which small ad hoc programs multiplies the cells of the programs into larger bodies of policies and institutions, as long as surrounding environment supplies critical momentum and resources.

Also, lifelong learning can be regarded as a set of institutional complexes, in that inner components, that interconnects the components like key competencies as new definition of human skills, RPLs as a way of recognizing the new skills, and various knowledge delivery systems including higher and adult education devices. A key here is whether each component is functioning with tight relations, or is “functionally closed” to enhance the coherence of the functionality of the larger system. Institutionalization is nothing but a process of enhancing the inner coherence of functionality and expansively reproducing the entity from the need that the system itself refers to. A clear circumscribable territory of concepts and practices are necessary that separates the ‘living system’ from the environment. The components are loosely coupled with one another, with logical and intrinsic connections, to reproduce larger layers of the system through self-referential and self-organizing processes. Here, the meaning of ‘self-referential’ focuses more on the internal dynamics of expansion, rather than mechanical correspondences by the outer forces or contestation.

Lifelong learning which had emerged during the last few decades was what has been differentiated from the traditional education system in general, and created new educational space outside the traditional territory; the inner connectivity between new policy devices and components within lifelong learning boundaries are ever strengthened functionally enough to create a coherent image of lifelong learning as a new human learning management system beyond schools and colleges. Lifelong learning system, in this sense, can be recognized as a self-referential system, in a sense that (1) people refer to the notion of lifelong learning distinctively by itself; (2) it operates and performs policies, programs, and structure, based upon the discourse of its own, and produce a differentiated functional entity; and (3) it continuously produces extra components that are to be produced in adapting fractal forms of the origin; (4) consequently, the interactions are stabilized and routinized by the framework; and finally, (5) the system has enough autonomy and identity to reproduce itself.

This theoretical assumption, not seemingly applicable to all the cases observed for the last few decades globally, can be plausible both in Europe and in East Asia. The beauty of this perspective lies in the process of systematization, being observed in lifelong learning process, which is not only influenced by external forces or by arbitrary powers, but also is stirred by an idea or pattern that has been self-referentially produced for itself. System's expansion is neither mechanically determined by external environment, nor a simple copy of existing structure. Urrestarazu's six rules are useful here as a guiding framework in speculating the emergence of lifelong learning as an evolution of a system (Urrestarazu 2013).

Now, regarding that a system is a set of activities that are institutionalized and stabilized to reproduce itself, the question in this research is to know what the nature of lifelong learning in institutionalization is, and what kind of theoretical framework we can apply for the process.

Europeanization and lifelong learning in Europe

Having said that education is a social system that differentiates itself by the functionality that produces, lifelong learning is a new functionality that rises in the context of Europeanization and learning economy, being differentiated from traditional front-end schooling system. A key point here is that, as mentioned earlier, lifelong learning is an 'overwhelmingly comprehensive body of idea' that has *comprehensive and integrative framework*. It is supposed to preside in the highest layer of the conceptual stratification, rather than a partial sector of education. Therefore, it does not fit in, or sneak into, any corner of the pre-structured education system. It reminds Wain's 'maximalist view' vs.

'minimalist view' contestation (Wain 1993, 2004). In Europe, the concept of lifelong learning circumscribed the clash by inventing a new space of 'Europeanization.'

New education policy space

The Faure Report (Faure et al. 1972) was the first major tablet of lifelong learning as idea and policy design. It was full of new philosophies with surprisingly detailed strategies with concrete recommendations that the future educational systems have followed. However, as Borg and Mayo argues, "the movement of writers on lifelong education associated with UNESCO seemed to have died out in the late 1980s (Borg and Mayo 2005, p. 207)," and never revived until the 1990s.

It was not until when Delors Report, *Learning: The Treasure Within* (1996), released in 1996 that lifelong learning discourses returned back and initiated actual policies and programs. To look back, Faure and Delors were not on the same page. Delors Report did not intend to revive the old lifelong education framework, neither to distort the spirit (Borg and Mayo 2005; Dehmel 2006; Welton 2005). Rather it was simply the new opening of a new blank space for education policies at the EU level

The continuing critiques, nevertheless, specifically questioned the rhetoric of lifelong learning in the line of the Delors Report. Field criticized that "its publications on lifelong learning have often been long on rhetoric, but short on specifics (Field 2002, p. 5)." Coffield complained the march of lifelong learning as 'via dolorosa' or 'a way of suffering' (Coffield 1996, p. 3). Plenty of handbooks and methodologies, from his point of view, were only to construct the 'heavens of lifelong learning,' while "beatitudes" in this long revolution were mere "fallacies." Bhola described it as 'discontinuity.'

The Commission's recommendations (Delors report) are somewhat discontinuous with the spirit of the Faure Commission Report (1972). The former's conceptualization of both development and education seems to be apolitical. Ideologically the Commission's recommendations triangulate with the 'Education for All' initiative of 1990, and with the World Bank's conceptualization of its priorities and strategies for education (Bhola 1997, p. 210).

In fact, the third college of the Delors' commission was the starter of the European Union with the introduction of Euro currency in 1993. The Delors Report was in the continuum of opening the new sphere of *Europeanization*. Hereafter, European education, especially higher and adult education, was re-located to the shoulder of "unprecedented supranational polity" (Holford and Milana 2014, p. 1), and "Europeanization was the first priority in the whole

process. Lifelong learning was a key process that enabled the overarching goal (Klatt 2014, p. 64).”

Lifelong education, which was once promoted by UNESCO, but which had little impact on educational policy despite its having become part of the popular rhetoric, suddenly has been firmly placed on the international policy agenda, albeit with a modification to the terminology. The emphasis is now is on *learning* rather than *education* (Borg and Mayo 2008, p. 703).

Or, as Klatt claimed,

Processes of education policy development in Europe are no longer located within the political, historical and cultural context of a single nation state. They are mediated by an emergent EU education policy space. Education policy in Europe is a result of mutual constitutiveness of agents and structures. National policies of member states can no longer be analyzed in terms of independent and dependent variables, as the relationship is increasingly mediated (Klatt 2014, p. 68).

The ‘EU education policy space’ in this context was a new space of functionality that education policies at each sovereignty were pulled out to the level of EU platform to form a supranational organ of education policy. It was the ‘framework’ of lifelong learning implied for.

At the turn of 1996, the term of *lifelong education* was switched to *lifelong learning*, by detouring the main territory of the ‘education’ system. The original framework of lifelong education, once proposed by the 1972 Report (Faure Report), was invented to challenge domestic ‘education system.’ Two decades later, the Delors Report simply bypassed the terrain of education, and began to make a new mode of structural coupling of supranational functional layer of education policy, being differentiated from the domestic platform, and having interwoven the education functions of each country on the table of ‘learning economy’ at the EU level.

Establishing lifelong learning framework at the EU level was ‘a smart choice,’ in a sense that European Union needed to establish an unprecedented system of human resource and learning management system that does not conflict, but coordinate with domestic education systems of the member states. In the Lisbon Process, the notion of lifelong learning was adopted in order to adequately construct a new education system with a different identity, at the supranational level. It comes to the European embryo from which new organs of educational systems were invented, such as key competences, Recognition of Prior Learning, European Qualification Frameworks, etc. This

began to coordinate changes in each of the national education system to meet the needs of learning economy.

It is noteworthy that ‘learning economy’ that guided Lisbon Process and whole Europeanisation afterwards was the new context upon which the new ‘coupling’ of different educational organs can take roles. Being differentiated from domestic and traditional policies, it focused more on public–private partnership, key competencies, prior learning recognition, learning market and professional non-degree continuing education, or cyber learning, etc. The emerging devices were not to be found from the lexicon of the older domestic education system. Overall, though still education is regarded as a matter of national sovereignty, lifelong learning was re-located to a new space outside the rigid matrix and legitimacy of public education. Lifelong learning was, in a way, a Baconian *Novum Organum* that supersedes the old *Organon* of Aristotle.

As a consequence, while national education system looked as if remaining intact, lifelong learning ecosystem in EU reclaimed a new larger discursive space that accommodated multiple EU level issues like employability in learning economy (Lisbon Process), exchangeability in higher education (Bologna Process), vocational education and training (Copenhagen Process), etc.

Since the mid-1990s, then, the Commission has followed its agenda on lifelong learning, deviating little in either employment or educational spheres. Education and Training 2010 integrated all actions in education and training at European level, including vocational education and training (the Copenhagen Process), and higher education (Bologna Process). In 2005 the Commission adapted the European Qualification Framework (EQF) as a key priority (Spolar and Holford 2014, p. 42).

Now, EU has two layers of education framework: the lower deck for traditional education ecosystems at a nation-state level that has long been intertwined with larger numbers of domestic functions under the ‘law of national gravity’; the upper deck for lifelong learning policies and programs that ‘coordinate’ innovative management functions in education on the ‘law of supranational gravity,’ which gave significant impact on the lower level.

New organs of lifelong learning system and fractals

As argued before, the idea of lifelong learning was structurally coupled with the process of Europeanization during 1990–2010. Those were the two wheels of the same bandwagon at the EU level, where the notion of lifelong learning was made into a reality and constructed into a total mosaic of the phenomenon. A series of ‘Europeanization’

processes have detached lifelong learning from the former image of adult education, and provided new image of (another level of) a transnational education system. So to speak, it was an initial step to obtain new circumscribable identity that distinguishes itself from the environments.

In the Lisbon education benchmarks, the concept of lifelong learning was more or less identical with adult education and learning; but at the same time, it was acquiring a wider significance in EU policymaking... The Commission suggested in 2004 to establish a single integrated program called the Lifelong Learning Programme. This was realized, and lifelong learning actually came to designate education and learning in different stages and areas of life—childhood, youth, adulthood; school, work, and civil society... the concept remained ambiguous in the EU policy discourse (Rasmussen 2014, p. 24).

The new space of education policy was declared by the 1992 Maastricht Treaty, which established a legal foundation for educational initiatives and policies. Since the Maastricht Treaty, the European commission began to engage in a series of concrete programs like the ‘Memorandum on Lifelong Learning,’ ‘Key competence development,’ ‘RPLs,’ ‘higher vocational education and training,’ and ‘European Qualification Frameworks,’ etc., all of which were invented to coordinate educational functionalities of national educational systems.’ They were *new modes of structural drifting and coupling between the education systems of each country* that gave a huge impact not only on innovating the education policies of the member states, but also on the relation between education and other functions like economy, politics, or culture in general (Borg and Mayo 2005).

The institutional processes were largely sequential and structural: bringing necessary parts of the components in the lifelong learning system, interlinked with each other to function in the whole circulations of policy streams. Indeed, the Lisbon Strategy was a key initiative that made lifelong learning more important. Memorandum on Lifelong Learning as well as Education and Training 2010 followed the Strategy. “By defining investment in knowledge as a key element in a new growth strategy for the EU, the Lisbon strategy gave education and training systems a much more important role in the overall EU policy process (Rasmussen 2014, p. 22).” Though having been the same in dealing with adult education in individual state level, the notion of lifelong learning was re-positioned to the cover term at the supranational level. The two consequences, *Memorandum on Lifelong Learning* (2000) and *Making a European area of lifelong learning a reality* (2001) included new components that previous approaches of lifelong learning had never attempted. The Lifelong Learning

Program 2007–2013 provided lifelong learning a legitimate locus to cover all the levels of education, so-called from cradle to grave.

To sum, lifelong learning since the 1990s was a series of producing new organs or components of a human learning management system on a new education policy space of EU. The learning economy needed new definitions of adult skills, teaching and learning delivery system with equivalent technologies, and learning outcome recognition systems, all of which are interlinked functionally to be connected with the labor market. In this sense, the system of lifelong learning looks ‘operationally closed,’ and ‘functionally self-referential.’ Lifelong learning in this context, along with the learning society platform, has been deployed as “an overarching strategy of European co-operation in education and training policies and for the individual.” As Tuschling and Engemann argue, it “is not to directly change the national approaches to education as in the Bologna process, but to find ways to compare and evaluate the different systems on the European meta-level (Tuschling and Engemann 2007, p. 39).”

Lifelong learning in East Asia: context

Indigenous context

The idea of ‘learning throughout life course’ is not exceptional in East Asia. Asia was second to none in emphasizing the societal values of learning and education. The concept of lifelong learning has been long rooted, even deeply, in East Asia (Sun 2010). According to Zhang, “the philosophy and practice of lifelong learning has a long history in China, being traceable to the Confucius idea of ‘education for all (Zhang 2010, p. 53).’”

Under the shared value of Confucian culture, the primary task of a society was to educate ‘scholar-officials’ who are able to govern the regime succeeding to the ‘way of heaven.’ A phrase of *The Doctrine of Mean* says “What Heaven imparts to man is called Human Nature. To follow our Nature is called the Way. Cultivating the Way is called Education” (Han 2013, p. 8). Education, in traditional connotations, embraces the spirit of universe, and humans are born to fulfill the spirit during one’s lifetime. Well-educated people were supposed to be selected through national scholar-official examination, to become local governors or central government officials. Many passed the examination even after fifty or sixty years of age, so in this vein, learning should have been lifelong process. It was the lifestyle of ‘scholar-officials.’ In this vein, Cheng et al. summarize well the characteristics of East Asian education, being embedded in the tradition: (1) education was a matter of scholarship; (2) learning was understood as self-

motivated and multi-modal; (3) learning had no age limit; (4) learning was for recognizable success which was often realized in examinations; (5) the ultimate aim of learning was to become a member of officialdom; (6) there was little left for learning when one has succeeded in the examination (Cheng et al. 1999, p. 120).

Lifelong education as institutionalized: “a stranger in an old town”

The tradition, however, has been disconnected since modern schooling was introduced around the nineteenth century by the Western colonialism. Schooling exclusively demarcated the recognized legitimate territory of education strictly within formal education. Education was a state apparatus for modernization and economic development. Higher education undertook the role of selecting ruling class, and seized the key steering authorities. Adult education,¹ in the meantime, was considered a supplementary education for the underprivileged in Korea, Japan, and China, or sometimes represents counter-hegemonic disposition to change the societies.

Lifelong education or learning becomes a core academic discourse as soon as it was introduced in the 1970s. Related researches were frequently published in the field of adult education, mainly from the 1980s in all the three countries. Due to cultural heritage, the terminology of ‘education’ was more principal one than ‘learning’ in East Asia, and ‘lifelong education’ was frequently used in interchangeable manner with ‘lifelong learning’ regardless of the contexts of each of their origins. Lifelong education especially was known as post-initial education, mainly for adults. In this sense, the ‘institutionalization’ of lifelong education (or learning) was inevitably overlapped with the territories of adult education practices.

The conceptual as well as institutional negotiations between lifelong education and adult education would be pretty much interesting: (1) In Korea, the notion lifelong education simply replaced the notion of traditional adult education at the first stage, and this further institutionalized the schemes and practices of former adult education policies. It later enlarged to the domain of formal education by targeting adult mature students at higher education and vocational training; (2) In Japan, the notion of lifelong education being discarded, both lifelong learning and traditional adult education were two overlapping, even competing, layers of practices, managed by different parts of the government gaining shared resources in local

community policies; (3) In China, lifelong learning was conceived of a dedicated territory of local community education, seemingly compartmentalized from other major parts of adult education and training.

Social risk and government’s countermeasure

The evolution of the lifelong learning system was ignited by immediate and transparent social issues to challenge, and in this sense, lifelong learning was institutionalized as a countermeasure of governments to face the newly emerging social problems, while the ways of institutionalization were clearly different in the three countries. In Korea, lifelong learning became state policy by the Ministry of Education, as a part of “adult education policy,” similar to that of the UK, separated in concept from vocational and continuing education. In Japan, on the contrary, the policy was adopted by both the Ministry of Education and the Ministry of Commerce and Industry, which expanded the range of its application wider. In China, it was a main work of larger metropolitan governments like Shanghai or Beijing, where lifelong learning is rather a matter of civil participation and citizen autonomy, not solely of a responsibility of education department.

My previous articles had attempted to show how the Asian Financial Crisis has awakened the neo-liberal version of a lifelong learning and learning society in Korea, and elsewhere as well.

With the urgency of coping with the [Asian Financial Crisis in 1997], the countries invented a number of ‘magic wands’ to stabilize the skyrocketing numbers of lay-offs and rising unemployment, which goes beyond the level of traditional handling of the labor market. What the Asian countries actually adapted was ‘restructuring the education system’ instead of its ‘simple shrinkage’ to link economic needs to the education sector, under a different name and different system: Lifelong learning instead of school education; competence instead of a subject-based curriculum; qualifications instead of diplomas; recurrent and ever continuing models instead of front-end models (Han 2007, p. 479).

The description seemed to well explain how Lifelong Education Law was launched in Korea in 1999. It, however, proven to merely open the door of the scene, while actual practice of lifelong education in Korea was more focused on curing the scars of communities and enhancing social integrations. Lifelong Education Law has functioned more toward supporting community education, rather than vocational training for employability.

About Japan, Makino succinctly explains the reason why lifelong learning, being separated from traditional

¹ The terminologies of adult education were ‘사회교육’ (sahoe gyoyug/) in Korea, ‘社會教育’ (shakai kyoiku/) in Japan, and ‘成人教育’ (chéngren jiàoyù/) in China. For the sake of convenience, I am going to call all of the term as ‘adult education’ in English expression.

adult education, had to emerge as a government policy (Makino 2013, pp. 46–47). Since the end of the 1990s, Japanese society entered into a serious depression (In fact, the depression had already begun from 1989): (1) With a huge amount of debt, the government had difficulties in even maintaining the previously operating social security system; (2) Government gave up on protecting people except for the minimum necessity. What the government was doing instead was to mobilize residents to participate in local activities under the slogans of decentralization and self-responsibility; (3) Nevertheless, such ‘community revitalization through lifelong learning’ urged by the state has not been very successful so far. Still, ‘adult education’ keeps dominant core activities in Japan.

Meanwhile, the declaration of a ‘harmonious society’ (和諧社會) was a direct context of lifelong learning in China. The notion of harmonious society was a countermeasure on the image of China as the ‘world factory,’ conducted with the sacrifice of low wages of larger domestic immigrant workers, and increasing income gaps and social inequality in urban areas. Also, China was rushing into an ‘ageing society.’ Social discrepancies and confrontations between the sectors reached a critical level, and the government added the issue of ‘social dimension’ to the previous trinity slogan of economic, political, and cultural construction, similar to the slogans of ‘social inclusion’ or ‘sustainability’ in Europe. Sun says “a learning society facilitates the establishment of a harmonious society” (Sun 2009, p. 34). Han and Makino explain more about the social discrepancies in the larger cities, as follows:

Ageing populations have grown rapidly and the proportion of the elderly in Shanghai have reached up to 20%, equivalent in average to the proportion of the aged population in Japan. In the meantime, cities have become full of under-skilled and poorly educated workers, who came in from inland areas. The inflow of domestic immigrants not only made the cities vast in terms of population, but also too heterogeneous to cohere into a unified entity of a community. The population officially registered in Shanghai in 2010 was about 14 million, while the actual population, either registered or not, is estimated to have reached up to 21 million around 2010. A third of the population in Shanghai is constituted by workers from inland areas and their families. These cities need to find solutions to handle increasing discontent, in a balanced mode of socialism and a market economy (Han and Makino 2013, p. 462).

Platform: community and social inclusion

Community in this context was an available open and shared seedbed in all the three countries where the concept

of lifelong learning took its roots in. Community education was a non-credit, non-diploma activity that had been relatively invisible in the diploma-centric education system. ‘Education’ in Asian culture mainly referred to schools and colleges, and served as the key ladder for social upward mobility under the morale of meritocracy. Formal education, in this context, was an exclusively restricted terrain in the process of institutionalization in education, and learning outside schools or colleges were relatively unnoticed. Adult education practiced in communities without any recognitions of learning outcomes was relatively unseen and also less institutionalized until the concept of lifelong education or lifelong learning has arrived (Choi and Yang 2012)

The community meant to be a public sphere (Daly and Cobb 1989; Park et al. 1993). The adaptation of lifelong learning policy created a new space of public education space, especially for individual learning for adults, and it was communities that nurtured and re-identified the learnings within the realm of ‘public’ space. In East Asia, adult learning has mostly been regarded a matter of private consumption (Makino 2013), and obtained least attention. However, the context of community strengthened a new space of adult education, with rationale of lifelong learning and learning society. In short, lifelong education in the three countries was educational institutionalization processes, in communities, for a new realm of personalized and individualized learning based on communities.

Among many, the main energy that brought lifelong learning into the surface was ‘social inclusion’ and the need for social capital, rather than employability and labor productivities. It does not mean that employment issue was less urgent. It was because the lifelong learning was initiated, and part of the Ministry of Education, in all the three countries as a leading agent, while employability issue was responsible to other government functions, alongside the promotion of vocational training and labor market education.

Institution forming: three different modes

The notion of lifelong education has been introduced in this region by the university academics, and the researches were relentlessly published. However, it was not until the 1990s that lifelong learning was put into practice. In short, Korea first adopted the idea in amending the Constitution in 1980, while no further action was executed until the Lifelong Education Law was enacted by replacing former Adult Education Law in 1999. Japan legislated ‘Lifelong Learning Promotion Law’ in 1990, with maintaining the Adult Education Law previously enacted. China currently does not have a dedicated law on lifelong learning in national level, but larger cities like Shanghai have established ordinances at a local level.

Korea: “embodiment”

Korean trajectory of lifelong learning institutionalization is so dramatic. It begins with inserting a simple statement, “The state should promote lifelong education” in the Amended Constitution of the Republic of Korea in 1980. The small fractal later multiplies itself by reproducing its own reference to Lifelong Education Law, Lifelong Learning ordinances, and organizations hereafter. Yet, this had to wait until the end of the 1990s.

The years of 1980–1990 were turbulent decades in Korean contemporary history. The Political resistance, with long lasted pro-democracy movements as well as labor movements by students, workers, and civilians, ended up with the establishment of the Civilian government in the election of 1992. The new government attempted to clear up the past authoritarian images in all the sectors including education policies. The government adopted the democratic framework of ‘learner-centeredness’ in educational policy making. The Presidential Commission on Educational Reform restructured educational legislations by and large in 1995–1998. Education Law was divided into four separate, but interlinked sets of laws, that includes Foundational Law of Education, Primary and Secondary Education Law, Higher Education Law, and Lifelong Education Law.

The Lifelong Education Law was not a new one, but what replaced the former Adult Education Law to inherit the spirit and enhance the functional stabilities, such as its structure, institutions, and policy delivery systems. It adopts a “fractal mode” of policy delivery system; in that the central model was referred to reproduce the metropolitan and provincial bodies of organizations and the local municipalities, in designing long term policies, providing education programs, and monitoring the achievements.

For example, the law enforced the central government to organize a National Committee for Promoting Lifelong Education, responsible for providing Basic Plans for Promoting Lifelong Education every five years, then metropolitan cities and provinces to set up an ordinance of regional lifelong education that adopts the central plan into the local level. It also required the central government to establish a National Institute for Lifelong Education (NILE), then obligated provincial institutes for lifelong education to follow the system. The link between central and provincial levels of regulations required the sharing of the blueprint of the Five Year Basic Plan of the central body to the local level (Choi and Yang 2012).

Since inheriting the legacy of adult education, lifelong education was identified as a part of educational activities, mainly focusing on literacy, liberal and cultural education in community, and citizenship education. The vocational

education and training for adults were differentiated with “lifelong career development” that juxtaposes with “lifelong education,” taken by the Ministry of Employment and Labor.

The philosophy of lifelong education by and large gave a significant impact on educational reforms in general since 1995: It set a higher value on the philosophy of learner-centeredness at schools and colleges; promoted mature students back to higher education level, including ‘lifelong education colleges’; established non-traditional academic qualification system like RPL and the learning accounts; set new teaching and learning methods like cyber universities and MOOCs.; built bilateral bridges of work-learning transitions. Recently, the education policy called ‘Lifelong Education Colleges’ are coined by the Ministry of Education, and support establishing separate colleges for housing mature students within a university framework.

National license of ‘lifelong educator’ is issued to those who completed 20 credit hours of college coursework, and specifically work for public community learning centers or institutions. The specialists distribute shared ideas and practical experiences of lifelong learning to those who are not familiar to this concept. Larger networks of the practitioners diffuse and share model practices.

Overall, lifelong learning in Korea embodies in the idea and practices of adult education. It performs in the area of adult and community education, trains adult educators in the name of lifelong learning, focusing on mature students in formal education system. It has its own legal territories and identities, being embedded in the body of adult education, and the components of the practices including the philosophy, laws, specialists, administrative systems, organizations and educational institutions, government funding scheme, etc. are interconnected to produce and reproduce more parts and components on its own references. It is a functionally closed system and produces continuously the fractals of the components.

Japan: “contestation”

In Japan, it was in the 1980s when the new notion of lifelong learning was seriously being considered by the Japanese government. With conceptual confusions between ‘lifelong education’ and ‘lifelong learning,’ The 1985 State Council for Education Reform unified the concept into lifelong learning, as a cover term that comprises both school education and adult education, under which adult education remained as a field of practice (Makino 2013).

It began to be institutionalized in the 1990s–2000s. Lifelong Learning Promotion Law passed the congress in 1990, which included the following items: (1) Formal education is the foundation of lifelong learning, and lifelong learning needs to support the school activities; (2)

Prefectural governments need to secure lifelong learning ordinances and organizations; (3) ‘Lifelong Learning Center’ will be set up at every Prefectures, which parallels with Kominkan at the municipality level; (4) Lifelong learning is coordinated at the national level by both the Ministry of Education and the Ministry of Commerce & Industry (Kono 2014).

In 2006, the vision of lifelong learning was added in the amended Educational Basic Law that declared the purpose of lifelong learning as ‘a collaboration between school, family, and local community,’ much larger than what Adult Education Law had comprised for community education. Adult Education Law, still having focused on Kominkan activities, was amended in 2008 in order to grasp the change of Education Basic Law. The main function of adult education became not only to facilitate local community education but also school activities and youth’s extra-curriculum activities.

Consequently, the two bodies of practices—old adult education and new lifelong learning—were unavoidably overlapped in rivalry against each other. The adult education was in the old tradition of community education aiming at people’s democracy and self-governing based on Kominkan facility in every small cities and villages, while lifelong learning was made possible by the Ministry of Education and the Ministry of Commerce & Industry that regulate the new organizational agency of ‘Lifelong Learning Centers’ in the prefectural level, with program provisions on after-school activities, labor market participation, and liberal education. Also, contrary to the adult education of Kominakan being financed by public expenditure, the lifelong learning framework was based upon private–public partnership that might threaten the Kominakan to be privatized and marketized (Uehara 2011).

To overview, lifelong learning in Japan is rather was keeping the comprehensive form and notions that original terminology implied as invented in Europe. They adapted the term lifelong learning instead of lifelong learning; comprises formal, nonformal, and informal learning; intended to include both social inclusion and employability. In so doing, lifelong learning is paying more attention to schools, while community education is still maintained by old adult education tradition framework.

China: “new concept in new issue”

China has a clear reason to adopt the notion of lifelong learning into state policy. President Jiang Zemin addressed at the National Education Conference of 1999,

Lifelong learning is the trend of the world... We should gradually set up and perfect the educational system that is helpful to lifelong learning. General

education, vocational education, adult education, and higher education should strengthen their articulation and integration, providing various education services for learners (Huang and Shi 2008, p. 502).

Cheng Kai-Ming and others (Cheng et al. 1999) divide the Chinese adult education frameworks into four different historical stages: (1) traditional education framework under Confucianism, (2) Adult education in the Socialist System, especially under Mao’s influence (1949–1976), (3) Adult education under the impact of open market and reformation, since Deng Xiaoping (1980s), (4) introduction of the Lifelong education framework since the 1995, being adapted and recognized as an official policy framework.

In retrospect, adult education system in China was established in the 1950s, right after the Revolution, to complement the shortage of formal education provision. The continued Cultural Revolution further devastated the whole intellectual basis. Also, the ‘open policy’ from 1978 gave rise to individual aspirations for education in all areas. The so-called ‘two-wheel approach,’ a dual system of youth education and adult education in all the primary, secondary, higher, and adult education stages, symbolizes the two-tier character of the Chinese education system.

The idea of lifelong education was introduced in China in as early as in the 1960s, but with no direct impact on policies until the early 1990s. It was included in the National Education Law of China (1995), claiming that ‘the state will progressively establish and perfect the lifelong education system’ (Huang and Shi 2008, p. 499). A series of state documents emphasized the importance, and “The China’s National Plan Outline for Medium and Long-term Education Reform and Development (2010–2020) was one of the key documents that adopted the concept of lifelong education as an important guiding principle, and put the building of a learning society in a more prominent position” (Carlsen and Yang 2012, p. 10).

The *shequ* education based on learning cities were core of the policy that the local governments adopted to meet the need. Basically, education policies in China were state-led and state-planned to meet the nation’s vision and goals, and it was not until the end of the 1990s that attention was paid to personal learning for adults at a community level. The notion specifically includes such expressions as learning freely, individualization of learning, diversified learning, sustainability and abundance to the learners, etc. (Liu 2003, p. 107). In this context, larger cities set up lifelong education ordinances and learning cities programs, like those in the Fujian Province (2005) or the City of Shanghai (2011). This transition has been termed “from the unit socialism to individual marketism” (Han and Makino 2013, p. 462).

Analysis

I have proposed in Chapter Two the self-referential system as a theoretical model. I argued there that social systems, though not the same as biological systems, can be elucidated by the *epistemological platform* that binds separately dispersed parts of social institutions together. I assumed that the legitimacy of institutionalization comes from the original values of what a system refers to.

The process of systematization, observed in lifelong learning process, is not only the arbitrary power games; rather, it is directed by the idea or pattern that has been self-referentially produced for itself. The series of European policy frames including Memorandum on lifelong learning, European Qualification Framework, Copenhagen Process, etc. include key components for lifelong learning system.

In Asia, the process of institutionalization of lifelong learning was observed in the community context by appropriating the heritage of former adult education, where a clear boundary of the policy identities was witnessed. Especially in Korea, legal structure and administrative system dedicated for lifelong learning were exclusively constructed in fractal modes. Meanwhile, in Japan, the lifelong learning was clearly identified, contrasting with adult education practices that has already dominated community basis. In China, the territory of lifelong learning in practice was still blurry, but clearly surrounded by traditional adult education system and practices, enough to be observed.

Concluding remark

Education itself, as a social system, has a clear border that distinguishes itself from other components of the society. It is differentiated from training or socialization (Dewey 1928/1987; Jarvis 2007), and not all kinds of teaching–learning activities are regarded as education. Education is known as a specifically elaborated way of managing human learnings, mostly associated with academics and state governance, that constituted a significant part of human civilization. As of public education systems, the ideas of education were proposed in around seventeenth to eighteenth century, then the education as a state apparatus was established during the nineteenth to twentieth century. As a whole, it has taken a couple of hundred years to be established as a functionally organized social system. Lifelong learning is constructing itself in the same manner. The notion of lifelong learning and learning society, departed from the territory of the education system, establishes a new layer of social systems that share little spaces with the traditional education system. It is based on

a post-school, post-diploma, post-institutional platform. It looks to organize itself by a self-referential manner, and the notion of learning society attracts key icons in this process.

In this paper, I contrasted two sets of lifelong learning in their institutionalization: Europe and East Asia. Both cases, I believe, have enough reasons to be considered as a process of self-referential reproduction. The economic crisis in the 1990s in Europe provided transparent impetus of a learning economy, as Delors and EU presumed, that consisted in the whole environment to emerge efficient tools of human resource development system, which in this case is what we call lifelong learning. The supranational context opened a new education zone of conceptual as well policy deployment on which new picture was to be created with less challenges from preoccupying rules and regulations of each member state's internal structure. The idea was translated into a simple Memorandum on Lifelong Learning that inscribed necessary signals, like a DNA, to produce organs and muscles for the learning economy. The memorandum in turn began to be 'a reality' with accordingly created first steps of "processes" like Lisbon, Bologna, Copenhagen, etc., that again bore specific and functional components like the European key competence, European Qualification Framework.

In Asian cases, it is not so straightforward. The idea of lifelong learning needed to squeeze into the traditional old town of education system. Community, in this case, was a blank sheet, far from formal credential education, on which to draw the picture of lifelong education (or learning). The institutionalized boundary was relatively clear, since it was equipped with laws, administrative systems, expertise, and separate funding for practices. In Korea, for example, some organizations and educational institutions are named "lifelong education institutions" by law, administrative management system was clearly defined, and national public expenditure had its own category. The interlinkage of those components accelerates the process of institutionalization and stabilization of the system's reproduction. Despite the lack of legal system on lifelong learning in the national level, China presides lifelong learning in the context of community autonomy, which is so clearly differentiated lifelong learning from other adult education practices. In Japan, lifelong learning as an institution is clearly visible in competing situation with adult education to prevail in overall community revitalization activities. The dedicated laws, identified organizations, shared cultures, depicted mechanisms to promote learning participations, recognition system for learning outcomes, qualification frameworks, etc. were continuously produced, adding up the whole system.

Before concluding the paper, I would value the notion of learning society, in this context, still important as a keyword that contains the momentum of lifelong learning as a

complex system. Complex system is a system that learns by itself to differentiate its functionalities, then learning society should still be appreciated the key context where new form of education system learns to reproduce itself upon the platform. In this sense, I would like to quote the following statement.

Anna Tuschling and Christoph Engemann describe how the discourse on and the administration of lifelong learning in the European Union is generating a European population of self-organizing learners. They trace the origin of lifelong learning to the discussions on alternative education in the 1960s and 1970s and demonstrate, along the lines of the distinction between formal and informal learning, how the field of learning is transformed from enclosed environments into a totality of learning events, while simultaneously, as a strategy of subjectivation, individuals are provided with the necessary skill-sets to become inhabitants of Europe as a learning society. We can see from this how ‘Europe’ is not to be considered so much as a kind of super-state, but rather as an assemblage of discourses and governmental techniques and strategies (Simons and Masschelein 2007, p. 9).

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