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Theoretical framework of the SP3 survey
of adults continuing studies in the formal education system

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This Working Paper is published in the Working Paper Series of an international research project “Towards a Lifelong Learning Society in Europe: the Contribution of the Education System” (acronym LLL2010) to reflect state of the art results of the research still in progress.

The project involves researchers from thirteen countries and regions of Europe: Scotland, England, Ireland, Austria, Belgium, Slovenia, Czech Republic, Estonia, Lithuania, Hungary, Bulgaria, Norway and Russia. Further information on the project is available online <http://LLL2010.tlu.ee>

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PURPOSE OF THE PAPER

LLL2010 subproject 3 focuses on the participation in formal adult education. From the literature we know that there are several potential determinants of participation and persistence in lifelong learning on the macro, meso and micro level. On the micro or individual level, the following determinants can be distinguished: age, gender, ethnic group, education, social position, social origin and motivation. The latter determinant, motivation, is – as one of the ultimate keys to implementing lifelong learning successfully - crucial, and arguably an important determinant to be influenced or optimized by interventions at the meso and the macro level. To foster a learning society, it is of prime importance that the formal education system and the characteristics of the learning environment (meso) and the broader institutional and policy context (macro) stimulate adults to develop a positive attitude towards lifelong learning and intrinsic, instrumental or autonomous motivation for participating, and continue participating, in it.

Within this theoretical overview, we describe the main determinants on the micro, meso and macro level which formed the theoretical basis for the implementation of the survey with 13 000 European adult learners.

INTRODUCTION

Participation issues have always been, and still are, one of the major concerns in the field of adult education (Courtney, McGivney, McIntyre & Rubenson, 1998; Gorard & Rees, 2002; OECD, 2005; Antikainen, Harinen & Torres, 2006). In the past decades, two main research movements have emerged in participation research (Jung & Cervero, 2002):

- The *traditional studies*, mainly from the US: on the one hand studies about the relationship between psychological attributes (such as motivation, attitudes, perceptions, intentions, ...) and participation, and on the other hand studies into barriers to participation, also with a focus on individual's and adjacent environmental attributes. These studies have often been criticized for being too individualistic.
- The *sociological perspective* on adult education: they indicate how demographic, technological, economic and cultural factors have an impact on aspects of adult education. In this view, which criticizes the traditional, rather individualistic studies, people can not be seen as independent from their social context in making decisions to participate in learning opportunities. These studies have on the other hand been criticized for being too deterministic.

In this project we try to reconcile both views into a 'socio-psychological approach' (as suggested by Jung, 2002, p. 318), following some recent evolutions in the sociology of education and educational psychology.

In the sociology of education, the '*life course perspective*', based on structuration theory (Shilling, 1992), tries to overcome the dualism between the individual and the social context, or between 'agency' and 'structure'. It focuses on the interplay between individual change and the changing social context. When examining the behaviour of adults in relation to participation and persistence, it is important to take account not only of the broader socio-economic context, but also the more immediate social situation of individuals (such as family and work dynamics) and the way in which these social factors play out at the level of the individual's experiences and perspectives (Davey & Jamieson, 2003).

In educational psychology, the *social cognitive approach* towards human agency (Bandura, 1989) also emphasizes the dynamic nature of engagement between learner and environment. Action, personal factors (cognitive, affective and other, e.g. motivation) and environmental events all operate as interacting determinants of human behaviour, in our case, participation and persistence in formal adult education.

Both movements in sociology and psychology thus agree upon the idea that 'people are making their worlds at the same time as their worlds are making them' (Watson, 2001, p. 223 in Webber, 2004).

In this research study, we describe the determinants of the individual by means of their socio-economic and psychological factors and the determinants of the environment by means of the characteristics of the educational institutions, the characteristics of the learning process, the characteristics of the adult education policy and the other dominating system characteristics within the European countries participating in this research study.

1. THE MICRO LEVEL: EXPERIENCES AND PERSPECTIVES OF ADULT LEARNERS

The *experiences and perspectives* of adult learners that ground their *motivation* are the central dependent variables in this subproject. In the literature, “motivation” is generally defined as the reason why someone participates, and continues participating, in an educational program (Gordon, 1993). It is a hypothetical construct, providing a possible concrete causal explanation of behaviour. A quote of Boshier states the importance of studying motivation: “*The nature of the individual learner and his reasons for participation is an important starting point for any research on adult education. An understanding of why adult education students participate would facilitate the growth of theory and models to explain participation, throw light on the conceptual desert that underpins adult education dropout research, and enhance efforts to increase the quantity and quality of learning experiences for adults*” (Boshier, 1991).

Within this micro level part of the text, we distinguish 2 dimensions. A first socio-economic dimension describes the social, cultural and economic inequalities in participation and describes who the actual participants are and to which socio-economic and socio-cultural groups they belong, a second psychological dimension describes the importance of the concept of motivation within research to participation in adult education.

1.1 Socio-economic dimension

The demand for participation in adult education is unequal (Nicaise, 2003). Different statistics over years show that adults having the highest need to participate – adults with low skills and knowledge, with a low educational attainment and a low literacy level -, participate very slightly.

The Human Capital Theory argues that the society can invest in people by means of adult education and training with a goal of increasing their productivity (Becker, 1964). Not only an increase of the productivity on the labour market, but also a growing knowledge and skill level within the personal life environment can improve the quality of life. The Rational Choice Theory, which is related to the Human Capital Theory, assumes that individuals try to realise the maximum of profits and the minimum of costs within their behaviour (Allingham, 2002). Within these perspectives, the decision to participate in adult education is an analysis of the costs and benefits.

Costs can be direct as well as indirect. Direct costs are made immediately to the course programme like the payment of an enrollment fee. Indirect costs are related to the fact that one is participating in an educational activity. Examples of these indirect costs are the payment of child care, the loss of income because one is spending time on education instead of time spending on work, less time for household tasks etcetera. On an overall level, indirect costs are more difficult to bear than the direct costs only.

Examples of benefits are an increased productivity on the labour market, chance of making promotion, chance of getting a higher salary, more chances to find a job etcetera.

Within the personal life, a better health condition, more social contacts, a more fluent practice of hobby's, ... are profits of participation in adult education as well. After all, we must admit that benefits are only visible after a certain amount of time and the benefits are never completely guaranteed.

The assessment between costs and benefits differs for every specific individual and leads to an increased or a reduced participation for some specific socio-economic and socio-cultural groups. Benefits are more visible for adults active on the labour market and the costs can be reduced by their employer. Youngsters have still long perspectives and thus more time to profit from benefits and the costs are usually lower for them as their income is not yet as high as for older adults. Edwards, Sieminski and Zeldin (1996) indicated that retired adults participate less, Bélanger (1997) stated a decreased participation from the age of 55 with a significant decrease from the age of 65. Also Doets, Hake and Westerhuis (2001) concluded that older participants participate less. Adults participating in adult education run the risk that the benefits are not in proportion to the costs they had to make. Those with a low educational attainment and a low economical position have less chances to succeed. The direct, but especially the indirect costs are of great inconvenience for them. Inactive adults cannot receive financial support from an employer and their own financial resources are rather small. Support from their own environment of family and friends is lacking in a lot of cases. Participation also differs towards the gender of the adult. Jacobs and van der Kamp (1998) noticed that women were underrepresented during a long time in history, but nowadays, females are overtaking the participation rates. Houtkoop and van der Kamp (1992) described differences in course subjects between males and females. Women participate more in leisure oriented courses, men are more active within labour market oriented programmes. Other authors concluding on gender differences within adult education participation are Hayes (1989), Sargent and Tuckett (1999), Tuijnman and Schuller (1999).

The cultural capital of this low socio-economic group is also not that high. A lot of adults within these poor socio-economic groups have less basic knowledge and skills to participate in an adult course fluently. Their literacy level is insufficient or they do not dispose of the entry qualification needed. Adults with a high educational attainment have the advantage of knowing how to learn which makes that they encounter less problems during the course. The importance of the educational attainment is dominant within a wide range of research reports. Statistics show that adults with a high educational attainment tend to participate more (OECD, 2000). Van Damme and Legiest concluded that adults with a low educational attainment have a poor confidence in their own educational abilities, were confronted with failing during their initial educational career and these aspects have a negative impact on their future willingness to participate. Other authors stating the importance of the educational attainment are Brunello (2001), Doerbecker and Hake (1979), Jung and Cervero (2002), McGivney (2001), Wössman and Schütz (2006). Not only the educational attainment, but also the general social class has his influence on the chance of participation in adult education.

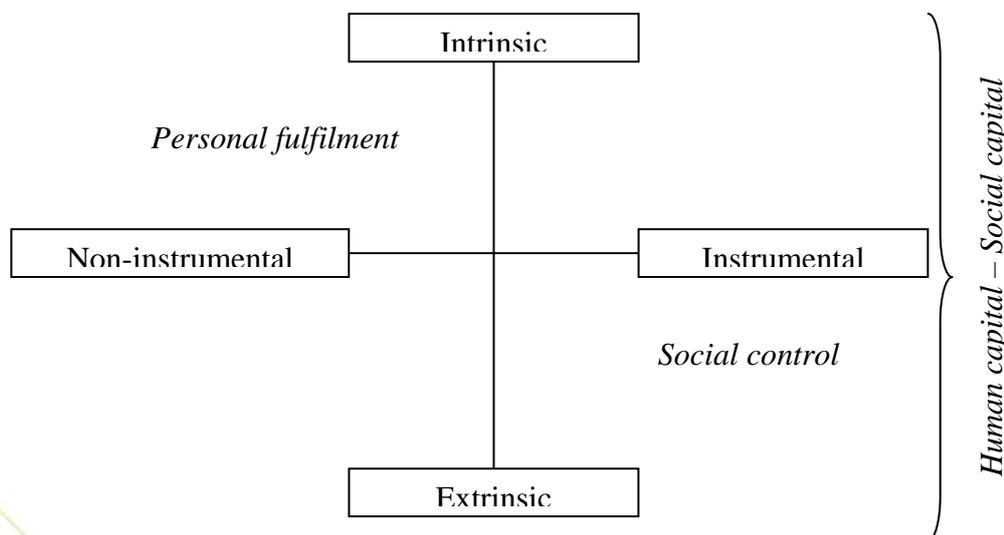
Tuckett and Sargent (1999) argued that participation is mostly a matter of the higher and the middle class. Van Damme and Legiest (1997) established an inequality in participation between white collar and blue collar workers, something we recognized within the work of different authors. La Valle and Finche (1999) concluded that employed people participate more and Field (2000) added that the higher perceived occupational groups participate more. Antikainen (2006), Beirnat and Smith (1998), Daley (2001) and Sawchuk (2003) come to similar conclusions. In the work of Pierre Bourdieu (1973) 'cultural reproduction' is a key term, meaning that the family in which one grows up, has a major influence on the progress of life, especially in the field of education and labour market. Bourdieu describes the family as the main serving hatch of cultural, social and economical

values which makes that the social, cultural and economical capital is unequal between individuals. These same issues are also important within the work of Field (2000), Nesbit (2006), DiMaggio and More (1985), Ganzeboom (1989), Nagel (2004), Brookover (1979), Coleman (1966), Collins, Moles en Cross (1982), De Graaf and Wolbers (2003), Kreft (1993) and Willis (1977).

1.2 Psychological dimension

Motivation can be intrinsic as well as extrinsic (Deci & Ryan, 2000). In the former case, the reason to participate in learning is inherent to the activity itself: adult education might give for example a lot of satisfaction. In the latter case, the reason to participate is based on something extrinsic to the activity, often in the form of a reward or punishment. In literature, intrinsic motivation is seen as ideal because it results in high quality learning (i.e. deep learning, intense concentration, absence of fear of failure,...) (Lambert & McCombs, 1998) while extrinsic motivation can result in surface learning, fear of failure, and so on. For adult learners who are not intrinsically motivated, extrinsic motivation can be the first step to increase the intrinsic motivation and also the participation (Schön, 1987).

Sometimes also the concept ‘instrumental motivation’ is used: learning because it is considered as ‘useful’ or because it is seen a way to obtain a socially valued reward (e.g. on the labour market), regardless of whether the initial reason to participate was intrinsic or extrinsic. The figure below illustrates how we conceptualize both dimensions of motivation, and how they relate to the specific functions of lifelong learning that are put forward in European policy, in the different national policies, and/or in the literature.



In the present day literature, psychologists involved in motivational research replaced the distinction between intrinsic, extrinsic and instrumental by autonomous and controlled motivation (Vansteenkiste, 2005). Autonomous motivation can be translated by the words “willing to participate”, controlled motivation by “having to participate”.

According to Keller (1987, 1999), there are 4 conditions that have to be fulfilled to motivate an adult to learn:

- attention
- relevance
- confidence
- satisfaction

These conditions are derived from a synthesis of psychological and educational research (English, 2005). Ideally, they must be seen as a sequential process. First of all, the attention of the adult learner must be gained and the learning activity must be accessible, otherwise the adult learner will quit the educational activity. Because SP3 focuses on participating adult learners, we can assume that this condition is fulfilled in our target group. Further, the learner has to see the relevance or the value of the courses for his own life. Once relevance is achieved, the student has to gain confidence in his own abilities. When the adult learner experiences success, he will be more motivated to continue his participation. Last of all, the feeling of satisfaction is also very important to take part in educational activities. The adult has to evaluate the learning process and outcomes as positive.

Inspired by the literature and by the SP1 comparative report, the following experiences and perspectives of the adult learners will be taken into account in SP3:

- *General attitudes towards lifelong learning*

The extent to which the adult thinks lifelong learning is (not) joyful, important and/or valuable for himself, others and the larger society.

- *Motives for (or the relevance of – or the expected benefits of) participation in formal education*

By analogy with the central functions of lifelong learning that can be discerned in European and national policy and the debate about whether LLL policy is an instrument of power and social control (see SP1 comparative report p. 7 and Ahl, 2006), 4 categories of motives for participation are distinguished at the individual level: human capital which focus on educational and professional advancement, to increase employability in the knowledge society, social capital in order to become a better, i.e. a more active, citizen (focus on community service), personal fulfilment for the intellectual enjoyment of learning and personal development and social control because participation is obligatory, to comply with external demands

- *(Lack of) confidence* in the ability to successfully complete the selected course in formal education
- *(Dis)satisfaction*
 - o With the formal education itself (process)
 - o With the expected outcomes of participation in formal education (outcomes)

2. CHARACTERISTICS ON THE MESO-LEVEL

2.1 The environmental context

The first general research question of this study is: ‘What is the role of the formal education system in stimulating participation in lifelong learning?’. The formal education system is the main environmental factor under study in this research project.

In fact, we want to test the central hypothesis that according to Ahl (2006) is implicit in traditional participation research, namely that participation and persistence follow a ‘homeostasis model’: ‘Initially, there is motivation. This is hampered due to various barriers. After removing those barriers motivation re-emerges, and all is well again. The model takes for granted that it is possible to affect motivation, and hence behaviour, by amending individual, situational or structural barriers’ (p. 396). Although it is dominant in the adult education (policy) literature and it is a central assumption in the LLL2010 project proposal, Ahl is rather sceptical about this way of thinking.

Within the formal education system, we distinguish characteristics on the meso-level of (a) educational institutions and (b) the learning process, and characteristics on the macro-level of the educational system (initial and adult education) and other system characteristics (economy, labour market, social protection, cultural context).

2.2 Educational institutions

During the 1960s, Coleman raised the question if schools can make a difference in the achievement of their pupils. In his Equity of Educational Opportunities Report, he came to the conclusion that children bring their socio-economic and socio-cultural characteristics into the class, and that these individual differences affect the differences in school attainment (Coleman, 1966). As a reaction against these conclusions, new research proved that the school can make a difference and narrow the inequalities between pupils (Mortimore, 1988). Within this research study, we are interested in the fact if the characteristics of the educational institutions have a relation with the experiences of the adult learners.

Based on an international comparative study Schuetze & Slowey (2002, p. 318) distinguished 6 institutional and policy factors (the latter being characteristics on the macro-level) which appeared to either inhibit or support participation by non-traditional students in higher education:

- Institutional differentiation in the adult education system: horizontal and vertical differentiation, articulation and transfer routes, student choice and information, no dead-end routes, equivalence of general and vocational routes, coordination between different sectors/programs. Note: these characteristics are not only important with regard to adult education but also with regard to initial educational.

- Institutional governance: institutional autonomy and flexibility
- Access: specific policy and outreach strategy for lifelong learners, open or flexible access, recognition of work and life experience, special entry routes, involvement in regional development/service for the community
- Mode of study: modular courses and credit transfer, part-time mode, distance learning, independent study
- Financial and other support
- Adult education opportunities: provision of relevant courses, appropriate scheduling, affordable fee levels

McGivney (2001) argues that only a broad range of strategies can change patterns of participation. These strategies need to be proactive in their approach, and include policy (national and institutional) backed by a realistic level of funding. Comparable factors appear in the review by De Rick & Van Valckenborgh (2004) and in OECD (2003). All these sources state the power of the educational institutions in attracting adult students.

2.3 The learning process

In educational psychology, it is generally agreed upon that it is part of human nature to be curious, to be active, to initiate thought and behaviour, to construct meaning through experience, and to be effective at what people value. Learner-centred education values these primary sources of motivation and capitalizes on them (Lambert & McCombs, 1998; OECD, 2000), by stimulating a learning process which is:

- active (= the learner actively constructs new knowledge on the basis of what he already knows and is able to do)
- functional (= learning takes place in real and realistic situations, aimed at functional application in a work context, community, ect.)
- social (= in co-operation with others; learning with and from others)

Furthermore, the psychosocial climate of the learning environment is very important in explaining adults' motivation and persistence. Research has shown that the more academically and socially involved adult students are, the more they feel connected to other students and faculty, the more likely they are to persist (English, 2005; New England Adult Research Network, 1999; Tinto, 1998). From O'Fathaigh (1997) and De Rick & Van Valckenborgh (2004), the following relevant characteristics can be derived:

- affiliation: the extent the students like and interact positively with each other
- teacher support: the extent of help, encouragement, concern and friendship teachers direct towards students

- task orientation: the extent to which students and teachers maintain focus on task and value achievement
- personal goal attainment: the extent to which the teacher is flexible, providing opportunities for adults to pursue their individual interests
- organisation and clarity: the extent to which activities are clear and well organised
- student influence: the extent to which the teaching is learner-centred and allows for student influence in course planning decisions
- involvement: the extent to which students are satisfied with class and participate actively and attentively

These characteristics of the learning process above are taken into account during the survey. We will return to these items within the following methodology chapter.

3. CHARACTERISTICS ON THE MACRO-LEVEL

3.1 The educational system

In this part of the text, we leave the perspective of the concrete educational institutions and their learning process and widen the scope into the broader system elements within the countries and Europe.

According to Brunello (2001) participation in training is influenced by the type and level of education, the characteristic of the individual as well as by peculiarities of the education system. Previous studies have shown that participation in further education and training depends on the level of education people have already attained (OECD 2000a). Further education occurs least often among those with the lowest level of initial education. Inequalities persist past basic schooling. Participation in adult education tends to follow closely the patterns of success in initial education. Additional training supplies cumulative advantages to individuals with higher levels of education (Gangl *et al.*, 2003). So further education occurs least likely in countries/regions where the proportion of people with low qualifications is high and the proportion of a cohort that is able to move to higher levels is high. There might be two explanations for this pattern: education increases the demand for more education or, low educated adults are less motivated.

The education systems differed to quite a great extent, ensuing from longer-term traditions of several countries. The structure of education system affects how individuals acquire education and training, how it is distributed across the population, and how credentials are valued in the labour market.

Education systems vary in the extent to which they either provide more general education or include vocational training as distinctive tracks in educational levels. Also important is the time period (the age of students), when the students are sorted in the respective education systems into different tracks and how rigid the boundaries between different tracks are. When examining the level of differentiation of education systems it is also important whether and how the opportunities differ to continue tertiary education of graduates from different types of school, and whether there is any educational dead-ends. In a differentiated education system each education track is designed to specialise in awarding rather narrowly defined occupationally relevant credentials. There is little opportunity to change direction once a student has entered one of career branches.

As to the education system, the degree of its stratification tends to influence participation in non-formal education. The degree of stratification of the education system is about the extent, to which general education and vocational training are separated into distinctive tracks and the rigidity of the boundaries between different tracks. In a highly stratified education system, each education track is designed to specialise in awarding rather narrowly defined, occupationally relevant credentials and those from the vocational track have a lower chance to continue with tertiary education. More comprehensive school systems with more emphasis on the general skills are defined as those of low stratification. In countries with these kinds of education systems, participation in non-formal education is higher than in countries with highly stratified education systems. Brunello (2001) suggested that participation in non-formal education is a kind of compensation for lack of

specialisation in initial education. But the same difference between education systems had been considered as yielding opposite outcomes: as Bassanini et al. (2005) argue vocational schools in stratified educational systems produce very specialized skills that become more rapidly obsolete in the presence of technical progress. So more training might be required to update existing skills.

In some countries with strong vocational components at the secondary level vocational and general education are highly segregated and it is hard to progress from vocational studies at the secondary level to tertiary studies. There is little opportunity to change direction once a student has entered one of career branches. Such differentiated and inflexible systems hardly provide opportunities to correct earlier educational decisions, to return to education after leaving the system, pass through school and work episodes or combine work and training activities. We assume that in countries with a differentiated system adults have lower opportunities for returning to the education system. These systems cultivate inequalities constraining the chances of the less educated.

The reliability of educational signals is crucially influenced by the degree of standardisation in education systems (Shavit and Müller, 2000). In highly standardised systems educational credentials send clear and reliable signals to employers about the quality of education and skills training of a potential worker. In a majority of European countries the general education system is rather standardized. Yet, the differences, if any, are revealed in vocational education systems. In part of the countries (primarily in German language countries) standardization is considered especially important for vocational schools, because if there are established professional standards issued to school graduates, the employers can rely on school leaving certificates, when hiring labour force. They can be confident then that those new workers will meet their expectations. We assume that the standardisation would have a twofold impact on lifelong learning opportunities. The standardisation will form the basis for achieving adequate job-person matches. From the employers' viewpoint there is less need to develop firm-internal career structures and to promote additional training for workers because recruitment from the external labour market becomes a more viable option (Müller and Gangl, 2003). Nevertheless standardisation would help to make educational paths more flexible and to facilitate the return to the education system.

Recent explanations of participation in non-formal education tend to take into account the rather complex character of the link between the education system and participation in non-formal education. Among theoretical frameworks that inform such explanations are those of labour market segmentation and internal labour markets (Maurice *et al.* 1986); welfare production regimes and the social, economic, and political institutions that support them (Estevez-Abe *et al.* 2001).

From Maurice *et al.* (1986) differentiation between systems of 'organisational space' and 'qualificational space' and their linkage to the education system, implications for non-formal education might be derived. In a system of organisational space, education is academic or general in character with specific occupational skills learned on-the-job. By means of additional training individuals obtain the skills that are necessary in a given company to make internal upward moves. The intensity of additional training is expected to be high in a system of organisational space. In *qualificational space* education is closely tied to job requirements and more importance is placed on diploma requirements and certificates (Maurice *et al.* 1986). Access to skilled jobs is reserved for those workers who have the specific skills needed for these jobs. In qualificational space the education system produces workers with occupation-specific skills (vocational education dominates). The acquired skills are transferable across firms and are recognised by employers. In qualification space adults having no certificates have a higher necessity to return to the education system because without certificates their career opportunities are low. But as a rule this space is

combined with a differentiated education system and so the rate of adults without education certificates is quite low.

3.2 Other system characteristics

Different institutional typologies had been developed to explain life course variation. Impact of education systems, employment relation systems, family systems, national welfare state regimes and the varieties of welfare capitalism on the life course had been explored.

Recently more comprehensive approaches have emerged. They view the institutional environment as multi-dimensional and highly interactive. Institutional systems and social structures in modern societies are seen as mutually interdependent arrangements that have a high degree of internal complementarity and might be best understood as a kind of country-specific 'institutional packages' (Blossfeld, 2003). A 'varieties of welfare capitalism' approach seeks out 'institutional complementarities' between different production regimes, industrial relations and social protection systems (Hall and Soskice, 2001). Rather than grouping countries under a single regime, it seeks to develop multi-dimensional models of institutional structures that are country-specific. According to this logic, the education system is part of a country-specific institutional package and thus educational opportunities are formed in interplay of different institutions and actors.

It has been argued, that basically, two alternative roads to competitiveness have been followed in Europe: 'low road' based on a low-wage, low-skill, low-involvement, and low-quality equilibrium and 'high road' entailing high wages, high skill, high co-operation and high product quality (Berger and Dore, 1996; Crouch and Streeck, 1997; Regini, 2000). Economically developed countries identified by varieties of capitalism approach as coordinated market economies (CME) (Hall and Soskice, 2001) might be also characterised as 'high road' competition economies, while those identified as liberal market economies (LME) rather follow 'low road' of competition. According to varieties of capitalism approach important institutional settings that contribute to different mechanisms of functioning in CMEs versus LMEs are financial systems, systems of industrial relations, education and training systems and inter-company relations. Specific features of these institutions have certain implications for the type of innovation firms prefer and type of skills they rely on.

To keep on the high quality road certain protection of investments into asset-specific skills is needed. Three different types of such protection have been distinguished: employment protection, unemployment protection and wage protection (Estevez-Abe et al., 2001). For firms pursuing product market strategies which depend heavily on firm- and industry-specific skills, promise of employment and unemployment security is of great importance as it is an incentive for workers to invest in (firms- and/or industry) specific skills. The more successful these firms are, the greater their demand for specific skills, the greater need for (employment, unemployment and wage) protection. Firms are prepared to invest in training because they can expect that workers remain in the firm for a sufficient length of time. It is the logic of specific skills equilibrium in CME.

The more fluid markets of LMEs provide economic actors with greater opportunities to move their resources around in search of higher returns, encouraging them to acquire switchable assets, such as general skills of multi-purpose technologies. The institutional framework of liberal market economies is considered to be highly supportive of radical innovation, which entails substantial

shifts in product lines, the development of entirely new goods, or major changes to the production process (Hall and Soskice, 2001: 38-40).

Labour markets with few restrictions on layoffs mean that companies interested in developing an entirely new product line can hire in personnel with the requisite expertise, knowing they can release them if the project proves unprofitable. Fluid markets and short job tenures make it rational for employees to concentrate more heavily on the development of general skills rather than the industry- or company-specific skills. Individual and firm investments in training are therefore small. There is no quality standardisation and there are no formal degrees and certificates, which are accepted across firms.

In case of general skills equilibrium (most firms are pursuing general skills strategies, while there is weak employment and unemployment protection) as in LME, higher protection would undermine workers' incentives to invest in these skills, without significantly increasing their appropriation of specific skills (because there is little demand for such skills). Accordingly in the industrial relations arena, firms in LME generally rely heavily on the market relationship between an individual worker and employer to organize relations with their labour force. Top management normally has unilateral control over the firm, including substantial freedom to hire and fire.

Unemployment protection, as protection from income reduction due to unemployment, is deemed to reduce uncertainty about income throughout one's career and is therefore an important incentive for investment into industry-specific skills (Estevez-Abe et al., 2001). It is the arena where welfare state policy is of a great importance for formation of skills and their renewal as a component of lifelong learning. There appears to be correspondence between types of political economies and welfare states. While social-policy regimes that accompany coordinated market economies are quite varied, virtually all liberal market economies are accompanied by 'liberal' welfare states, whose emphasis on means-testing and low levels of benefits reinforce the fluid labour markets that firms use to manage their relations with labour (Esping-Andersen, 1990). In the 'varieties of capitalism literature' the set of product market strategies, employee skill trajectories, and social, economic and political institutions that support them, are referred to as welfare production regimes; the welfare state can also be understood as a complement within national production systems (Hall and Soskice, 2001).

Two welfare production regimes have been distinguished: one combining high protection on at least one of two (employment or unemployment) protection dimensions with firm- and/or industry-specific skills, represented by the continental European countries and one combining weak employment and unemployment protection with a general skills profile, represented by the Anglo-Saxon countries and Ireland (Estevez-Abe et al., 2001). In the latter countries there is high demand for semi-skilled workers with general skills; general skills are usually obtained in the formal educational system; students who are academically strong do their best to get as high level of education as possible, while student who are not academically strong, are offered relatively few opportunities for improving their labour market value outside of the school system and as a result, there are fewer incentives for them to work hard inside the school system (Estevez-Abe et al., 2001). Hence, there are fewer incentives to both employers and workers to invest into intensive further training in LME. To put it another way the total demand for work-related lifelong learning in these countries should be more differentiated (shifted rather to low skills but to very high skills as well) compared to CME where most firms pursue specific skills equilibria

As in the long run both LME and CME had proved their sustainability, the same might be expected in relation to general versus specific skills equilibrium. 'Generated by the globalizing economy' the

demand for lifelong learning is supposed to be filtered by the country-specific institutional package. This generates different challenges and allows different space for change of education systems. This embeddedness of educational institutions into the wider institutional context has certain implications for the learning career.

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GENERAL CONTEXT OF THE LLL 2010 RESEARCH PROJECT

In March 2000, the then 15 European leaders committed the European Union to become by 2010 “the most dynamic and competitive knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment”. The Lisbon strategy, as it has come to be known, was a comprehensive but interdependent series of reforms, which has significant implications for a whole range of social policies, including policies for learning.

As part of the Lisbon strategy, the European Union has set the goal of raising the number of adults participating in lifelong learning to 12.5% by 2010. However, the proportion of learning adults in Europe differs widely across countries. The project "**Towards a Lifelong Learning Society in Europe: the contribution of the education system**", which forms part of the European Commission's 6th Framework Research Program, is dedicated to identifying the reasons behind these differences and to studying the policies and practices related to adults' participation in and access to lifelong learning in a number of European countries (see project's web-page <http://LLL2010.tlu.ee>).

The project involves researchers from thirteen countries and regions of Europe: Scotland, England, Ireland, Austria, Belgium, Slovenia, Czech Republic, Estonia, Lithuania, Hungary, Bulgaria, Norway and Russia.

Project objectives

The objectives of this project are to:

- Show to what extent the countries differ in terms of patterns of lifelong learning.
- Reveal how these differences depend upon specific institutions and policies of each country.
- Assess the contribution of each country's education system to the development of lifelong learning.
- Trace the ways institutional and policy prerequisites for lifelong learning have been developed in European countries.
- Identify the barriers to participation in lifelong learning in terms of policies, educational institutions, enterprises' practices and potential learners' motivation.
- Identify the best solutions and most successful practices in terms of participation in lifelong learning and to decide to what extent these would be applicable in other countries.
- Propose changes, which would enhance adult participation in lifelong learning and decrease social exclusion.

The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

Potential impact

Project is expected to contribute both to competitiveness and cohesion of the EU by (a) developing and carrying out a joint agenda for a better understanding of the tensions between the knowledge-based society, lifelong learning and social inclusion in the context of enlargement of the EU and globalisation, (b) identification of best practices and suggestion of ways for implementation in order to reach the objectives for lifelong learning. The LLL2010 research project extends over five years

(commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

The plan for disseminating the knowledge

The project aims to examine and report on national differences in approaching formal lifelong learning, but also to assist policymakers and practitioners in learning appropriate lessons from contrasting practice in other countries. Therefore, disseminating knowledge to relevant audiences – individuals, institutional actors and policymakers – is of the core issues within this project, and so dissemination activity will take place throughout the life of the project.

The preliminary results will be discussed in the workshops and conferences and introduced to national as well as international audiences. The results of the different research projects within LLL2010 will be presented in five comparative reports – one per subproject – and a final report, and two books will be published as a result of the project. A Conference “The Contribution of the Education System to Lifelong Learning”, scheduled in the end of the project, is aimed at discussing findings, conclusions and expert opinions on a European level.

To contribute to scientific discussion and enhance comparative studies in the field, further analysis of the results of the research will take place in articles published in specialized and interdisciplinary journals. As LLL2010 will undertake a number of original studies, the data, questionnaires and codebooks, and all the other relevant materials generated in the project will be made available to the scientific community at large.

Research Institutions in LLL2010 Consortium

1. Institute for International and Social Studies, Tallinn University, Estonia
2. Higher Institute for Labour Studies, Catholic University of Leuven, Belgium
3. University of Nottingham, England, United Kingdom
4. Moray House School of Education, University of Edinburgh, Scotland, United Kingdom
5. Educational Disadvantage Centre, Centre for Human Development at St. Patrick's College, Dublin City University, Ireland
6. Fafo Institute for Labour and Social Research, Oslo, Norway
7. Slovenian Institute for Adult Education, Ljubljana, Slovenia
8. TÁRKI Social Research Centre, Budapest, Hungary
9. Centre for International Relations and Studies, Mykolo Romerio University, Vilnius, Lithuania
10. Institute of Sociology, Sofia, Bulgaria
11. St. Petersburg State University: Department of Sociology, Department of Retraining and Improvement of Professional Skills for Sociology and Social Work, Russia
12. 3s research laboratory, Vienna / Danube University, Krems, Austria
13. The National Training Fund, Prague, Czech Republic
14. Institute for Social Research, Vilnius, Lithuania

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