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Developing a Typology of Approaches to Lifelong Learning in Europe: Varieties of Capitalism and Approaches to Lifelong Learning

LLL2010 SP1 Report

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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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TABLE OF CONTENTS

Table of Contents	3
Introduction	4
1. Existing Characterisations of European Social Welfare Systems	5
2. Methods Used In Developing The Typology Of Lifelong Learning	8
The Nature of the Variables Gathered.....	8
Difficulties Encountered.....	8
3. Analysis of the data: similarities and differences between European countries.....	10
4. How applicable are existing typologies of welfare to lifelong learning?	15
Scandinavian model	15
Anglo-Celtic Model	15
Continental model	15
Catching Up Model.....	15
Conclusion	17
References	18
Appendix 1 Data Contributing To Typology Of Lifelong Learning: Explanation Of Measures And Sources	19
General Context of the LLL 2010 Research Project	21

INTRODUCTION

One of the key objectives of the Sixth Framework project entitled Lifelong Learning in Europe 2010 (LLL2010) is to develop an understanding of the iterative relationship between lifelong learning systems and the wider social and economic systems in which they are embedded. This is particularly important task at the moment because, whilst there is a considerable literature on welfare and educational systems in the old member states, far less is known about the rapidly evolving new member states in central and eastern Europe. In this paper we provide some ideas on the development of a tentative typology which aims to locate lifelong learning within a broader political and social context. The development of typologies is, of course, a fraught business, beset with problems relating to which countries are assigned to particular groupings in terms of their commonalities and differences, reliability of statistical and policy data and the tendency to over-simplify complex social systems. Nonetheless, typologies may be useful in terms of throwing into high relief the similarities and differences between particular systems. In particular, it enables us to view critically the variants on the European socioeconomic model which are emerging in the context of globalisation, and, more specifically, the way in which capitalism is evolving internationally (Hall and Soskice, 2004).

Lifelong learning is clearly a key aspect of social policy, linking education, social security and employment. It is therefore useful to begin with a brief overview of existing typologies of social welfare regimes, considering their applicability to the field of lifelong learning. Most of these typologies have been developed in relation to the EU-15, and one of the major challenges of this project is to begin to understand the directions in which the new member states are moving.

It should be noted that a number of typologies have been developed of psychological models of lifelong learning (e.g. Schuetze, 2007), models of transitions within national education and training systems (e.g. the CATWE project <http://mzes.uni-mannheim.de/projekte/catwe/papers/chapter3.pdf>); and of individual approaches to lifelong learning (Field, 2006). However, the objective of this paper is to consider the links between the evolution of lifelong learning systems in specific national contexts, and therefore the typology we have developed draws more closely on existing accounts of social welfare systems.

Our central argument is that much may be learnt about particular varieties of capitalism in different European countries by analysing their approaches to lifelong learning.

1. EXISTING CHARACTERISATIONS OF EUROPEAN SOCIAL WELFARE SYSTEMS

The best known typology of welfare states is Esping-Andersen's 'three worlds of welfare capitalism' (Esping-Andersen, 1989). This is a theoretically founded typology which divides capitalist welfare states according to welfare regimes as follows:

- the 'liberal' welfare state which has a limited social insurance plan and means tested benefits. The beneficiaries are usually low-income and from a working-class background (e.g. United States and United Kingdom);
- the 'conservative-corporatist' regime which aims to retain existing difference in status within the particular society. There is a strong emphasis on social insurance (e.g. Belgium, Austria); and
- the 'social-democratic' regime that has its aim to promote equality and to provide universal benefits. It normally has a universal insurance scheme but uses some means-testing in provision of benefits (e.g. Norway).

Esping-Andersen's approach has been criticised on the grounds that even some of the countries for which it was originally developed do not fit neatly into one of the categories, and that it does not fully take into account gender issues. An alternative, developed by Castles, refers to 'families of nations', implying looser groupings than the more rigid notion of a typology. Each 'family' is based on shared cultural, linguistic, geographical and/or historical traditions which, it is assumed, lead to the development of particular welfare policies. Castles identifies four 'families' and in relation to Europe these are:

- a. an English-speaking family consisting of Ireland and the UK;
- b. a Nordic family consisting of the Nordic countries;
- c. a continental Western European group consisting of Austria, Belgium, France, Germany, Italy and the Netherlands; and
- d. a Southern European group consisting of Greece, Portugal and Spain.

More recently, following the expansion of the EU, challenges have arisen in terms of incorporating new member states into existing social welfare models. Aiginger and Guger (2006), drawing on the work of Esping-Andersen and others, look at the differences between the European welfare model and the new model now emerging in much of Europe, most specifically in the successful Scandinavian countries. They argue that the new European model, characterised by welfare and sustainability on the one hand and efficiency and economic incentives on the other, differs from the old welfare state model and from the US model, even though Anglo-Saxon countries are trying to combine some elements of both. Large continental countries (Italy, Germany and France) have been less successful than the Nordic countries in developing this new model. They also argue that the education system and institutions of the knowledge economy are playing an increasingly important role in the new European socioeconomic model, as well as the traditional components of welfare societies such as the social security and taxation

system. They suggest that there are three key dimensions, responsibility, regulation and redistribution, which characterise the European socioeconomic model and which are reflected in different ways in a variety of European countries. **Responsibility** refers to the activities which the state undertakes on behalf of its citizens, including providing welfare, health and social care services, housing, education and so on. In some European countries, individuals are expected to accept a greater degree of responsibility for the procurement of social support than in others. **Regulation** refers to the way in which labour relations are institutionalised and the labour market is regulated, as well as other administrative systems which control social relations. **Redistribution** refers to the way in which financial support is transferred to those in need and the extent to which social services are available to all. The taxation system is clearly of great importance in determining the extent and nature of distribution which occurs within a society. Overall, the European socio-economic model, as interpreted in different nation states, influences and is shaped by every aspect of life, including employment, production, productivity, cultural institutions and behaviour, learning and the creation and diffusion of knowledge.

The typology of countries suggested by Aiginger and Guger draws heavily on the Esping-Anderson model, and, despite emphasising the importance of education and lifelong learning, strongly reflects traditional economic indicators such as annual growth, GDP pre capita, employment rate and unemployment rate. It includes the following groupings:

- a. Scandinavian Model (e.g. Denmark, Finland, Netherlands, Sweden, Norway)
- b. Continental Model (e.g. Germany, France, Italy, Belgium, Austria)
- c. Anglo-Saxon Model (e.g. Ireland, United Kingdom)
- d. Mediterranean Model (e.g. Greece, Portugal, Spain)
- e. Catching-up Model (e.g. Czech Republic, Hungary)

The **Scandinavian model** places a great deal of emphasis on redistribution, with social benefits financed by high taxation. Social partnership is also stressed, with employers, trade unions and educationists/trainers contributing to the sustenance of a knowledge society. The model is characterised by active labour market policies and high employment rates.

The **continental model** emphasises employment as the basis of social transfers, but places much less emphasis on including those who are outwith the labour market or the education system, with little emphasis on redistribution. Industrial relations and wage-bargaining are centralised and education systems are relatively static and hierarchical.

The **Anglo-Saxon model** is economically and socially liberal, emphasising the importance of individuals adopting responsibility for their own education, training and social welfare. Social transfers are smaller, more targeted and means tested. There is less regulation of the labour market and freedom of movement within the education system.

Within the **Mediterranean model** social transfers are small and the family takes a major responsibility for providing support and care to its members. Employment rates, specifically those of women, are low.

The **catching-up model** is characterised by de-regulated labour markets and low taxes on individuals and companies. New EU member states are relatively much poorer than old member states, and whilst the old socialist forms of social support have disappeared or diminished, new forms of welfare such as those in the Scandinavian countries have not as yet emerged. Key features of the catching-up model have yet to be elaborated, and there is clearly a need to investigate existing and emerging differences between these countries.

Given Aiginger's and Guger's emphasis on the centrality of education and knowledge creation and diffusion systems in the creation of a particular country's socio-economic regime, these models seemed to be a good starting point for the development of our own attempt to characterise lifelong learning systems, and in the sections which follow, we explore the applicability of Aiginger's and Guger's models. However, we begin by explaining the variables we decided to focus on, the sources used and the difficulties in constructing the typology.

2. METHODS USED IN DEVELOPING THE TYPOLOGY OF LIFELONG LEARNING

The Nature of the Variables Gathered

Following Aiginger and Guger, the variables selected for inclusion in the table reflected key features of the national economy such as GDP and the proportion spent on education, employment rate, poverty risk and the extent of support for disadvantaged groups through social institutions and social transfers. The organisation of the compulsory education system was noted, and the proportion of young people attaining at least upper secondary education (ISCED 3) was used as a broad indicator of the general success of the school system. In relation to the system of lifelong learning, we noted the proportion of 25-64 year olds in formal education and also the proportion in undertaking any form of lifelong learning, which might be formal, informal or non-formal. Finally, we drew on the national reports produced as part of sub-project 1 to identify the emphasis within national lifelong learning systems on the generation of human capital, social capital and the fostering of personal development. We also attempted to include an indicator of the extent to which participation in lifelong learning was used as part of an active labour market policy, in particular as a qualification for the receipt of social transfers. However, we were unable to obtain this information from a significant number of countries and therefore were forced to abandon it. Clearly the selection of these variables and not others was somewhat arbitrary; the aim was to include broad indicators which provided some insight into multiple aspects of a country's social welfare system without ending up with a set of variables which was too long to be manageable.

The following sources of information were used (i) The national reports produced by team members and (ii) statistics and policy reviews compiled by bodies such as Eurostat, Euridyce. Every effort was made to obtain data from one source for all countries to try and ensure comparability, however, this was not always possible particularly for the new member states. In addition, it was sometimes difficult to disaggregate Scottish and Flemish data from the broader UK and Belgian data. The glossary to the table provides technical information on the meaning of each variable and its source.

Difficulties Encountered

General problems with welfare state typologies

Questions arise as to whether it is feasible to develop a typology which makes assumptions using the nation state as the basic unit of analysis. Clarke (2005), for example, has questioned the validity of assuming that welfare states equate to nation states. In the past, he argues, nation states consisted of people who were united by their residency, culture and were governed by a sovereign state that was responsible for the legislation in that country. This is shifting to more multi-level governance, influenced both

by regional and trans-national processes. It could be argued that this is particularly evident in some of the new EU member states where independence led to a move away from communist social protection to one that not only had to take account of the capitalist market, but also, after EU accession, had to demonstrate that social protection was in line with EU demands based on the social model (Hantrais, 2002).

Including the new member states

For the purposes of the LLL2010 research, existing typologies have significant limitations. Neither includes any of the previously communist European countries, having been developed prior to or around the period of transition from the communist to capitalist regimes. Cousins includes the Czech Republic in his analysis of European countries and notes in relation to the Central and Eastern European (CEE) countries that: 'One could not, at this time, argue that the CEE countries make up a coherent world of welfare or even, in any strong sense of the term, a family of nations' (Cousins, 2005: 123).

Consistency and reliability of data

Problems of reliability and consistency existed in relation to the European statistics which were gathered as well as the national reports. In relation to the statistics, this was particularly apparent in the context of the measurement of rates of participation in lifelong learning. The 2003 Labour Force Survey data were particularly unreliable, including all forms of informal learning for some countries and not for others. This, for example, suggested that 89% of people in Austria (96% of those who were economically inactive) were participating in lifelong learning, compared with 11% in Hungary and 76% in the UK. Having examined these data carefully, we discovered that the 2004 data appeared to be rather more consistent, having tightened up the definitions of lifelong learning employed and harmonised the questions asked in different countries.

Difficulties also emerged in drawing data from the national reports. These were compiled in a two-stage process; first, team members reminded to a questionnaire about their country and secondly wrote a report under pre-specified headings. However, the information provided in the reports was patchy and tended to reflect the perspective of the individual or team writing the report. For example, some team members from an education background had little knowledge or understanding of the relationship between lifelong learning, employment and social transfers. As noted above, this became particularly clear when we asked people to comment on the extent to which participation in lifelong learning was a condition of receiving some or all social security benefits including unemployment or incapacity benefit.

3. ANALYSIS OF THE DATA: SIMILARITIES AND DIFFERENCES BETWEEN EUROPEAN COUNTRIES

The table 1 on next page includes some key data on country characteristics and rates of educational participation. In this section, we briefly review some of the messages on similarities and differences between countries, before considering how well they fit into the Aiginger/Guger model.

The accompanying glossary in Appendix 1 provides details of how particular measures have been calculated and which sources of data have been used.

It is evident that there is a major divide in terms of the wealth of the old and new member states, with Norway by far the richest as a result of its small population and plentiful natural resources, in particular North Sea Oil. Ireland has a considerably higher GDP than Scotland, which is somewhat poorer than Austria and Flanders. Scotland's GDP is twice that of Slovenia, the wealthiest of the new member states included in the study. In turn, there is a gap between Bulgaria, a recent accession state, and the more established of the new member states. Countries vary in the percentage of GDP spent on education, with Norway and Scotland spending a relatively high proportion compared with Flanders, Austria and Ireland. The new member states in general spend a slightly lower proportion of GDP on education than the old member states.

Countries differ with regard to the proportion of their working age population in employment, with Norway having the highest proportion followed by Scotland. New member states, particularly Bulgaria, have lower employment rates, than the old member states, although Slovenia and Ireland are very similar. Employment protection also varies, with the UK and Ireland having less regulated labour markets than all other countries, including the new member states. Norway, Flanders and Austria have the highest level of employment protection. The risk of poverty is greatest in Ireland and the UK, and lowest in the Czech Republic and Norway. In terms of support for disadvantaged groups, Norway and Slovenia are identified by the EU as providing adequate support in terms of social inclusion initiatives and measures for those at risk of social exclusion, whilst support in all other countries is seen as partial.

Data contributing to typology of lifelong learning (2004)

	Nor	UK - Sco	UK - Eng	UK	Ire	Bel - Fla	Aus	Slo	Hun	Cze	Est	Lit	Bul	Rus
GDP (% GDP spent on education)	153 (7.6%)	118.6 (7%)	:	119 (5.4%)	139 (4.4%)	120.5* (5.6%**)	122 (5.5%)	78 (6%)	61 (5.9%)	72 (4.6%)	50 (5.7%)	48 (5.2%)	30 (4.2%)	:
Employment rate	74,8	71,5	:	71,7	67,6	64,3	68,6	66	56,9	64,8	64,4	62,6	55,8	65
Employment protection	2,6	:	:	1,1	1,3	2.5 (B)	2,2	2,9	1,7	1,9	2,6	2,7	:	:
Poverty risk	11	:	:	18	21	15 (B)	13	10	12	8	18	15	14	:
Support for disadvantaged groups	Adequate	Partial	Partial	Partial	Partial	Partial	Partial	Adequate	Partial	:	:	:	Partial	No info in NR
Compulsory ed.	Comp	Comp	Comp	Comp	Comp	Stratified	Stratified	Stratified	Comp	Comp	Comp	Comp	Comp	Comp
% with upper sec ed	95,3	70,6	:	76,4	85,3	69,8	85,3	89,7	83,4	90,9	82,2	86,1	76	70.7***
% in any LLL	34,7	:	:	39,8	48,9	41.9 (B)	89,2	82	11,7	28,7	31,4	27,8	16,1	:
% in formal LLL	3,9	:	:	8,4	5,4	4 (B)	3	7,6	2,9	1,4	3,7	3	1,2	:
% in formal and non-formal LLL	17,8	:	:	27,5	7,4	9,1	12,9	15,3	3,9	5,6	5,9	6	1,3	:
% in LLL by work status	:	:	:	Em: 23.1 Un: 20.5 In: 13.9	Em: 6.1 Un: 5.5 In: 6	Em: 11.4 Un: 12.6 In: 5.2	Em: 12.7 Un: 14.9 In: 8.1	Em: 18.3 Un: 15.4 In: 9.5	Em: 4.5 Un: 3.2 In: 3.2	Em: 6.6 Un: 2.2 In: 3.7	Em: 7.2 Un: 4.6 In: 4.2	Em: 6.8 Un: 3.8 In: 3.4	:	:
% in any learning by educational attainment	Low: 15 Med: 30 High: 51	:	:	Low: 12 Med: 37 High: 61	Low: 35 Med: 51 High: 66	Low: 23 Med: 42 High: 67	Low: 87 Med: 89 High: 95	Low: 67 Med: 83 High: 97	Low: 4 Med: 11 High: 27	Low: 10 Med: 26 High: 63	Low: 10 Med: 25 High: 52	Low: 6 Med: 21 High: 60	Low: 2 Med: 12 High: 45	:
Emphasis on HC	High	High	High	High	High	High	High	High	High	High	High	High	High	High
Emphasis on SC	High	High	Medium	High	High	Low/ Medium	Low	Medium/High	Low	Low/ Medium	Medium/ High	Medium/ Low	Low/ Medium	Low
Emphasis on PD	High	High	Medium	High	High	Medium/ Low	Low	Medium/Low	Low	Medium/ Low	Low	Medium/ Low	Low	Low

* Belgium = 119

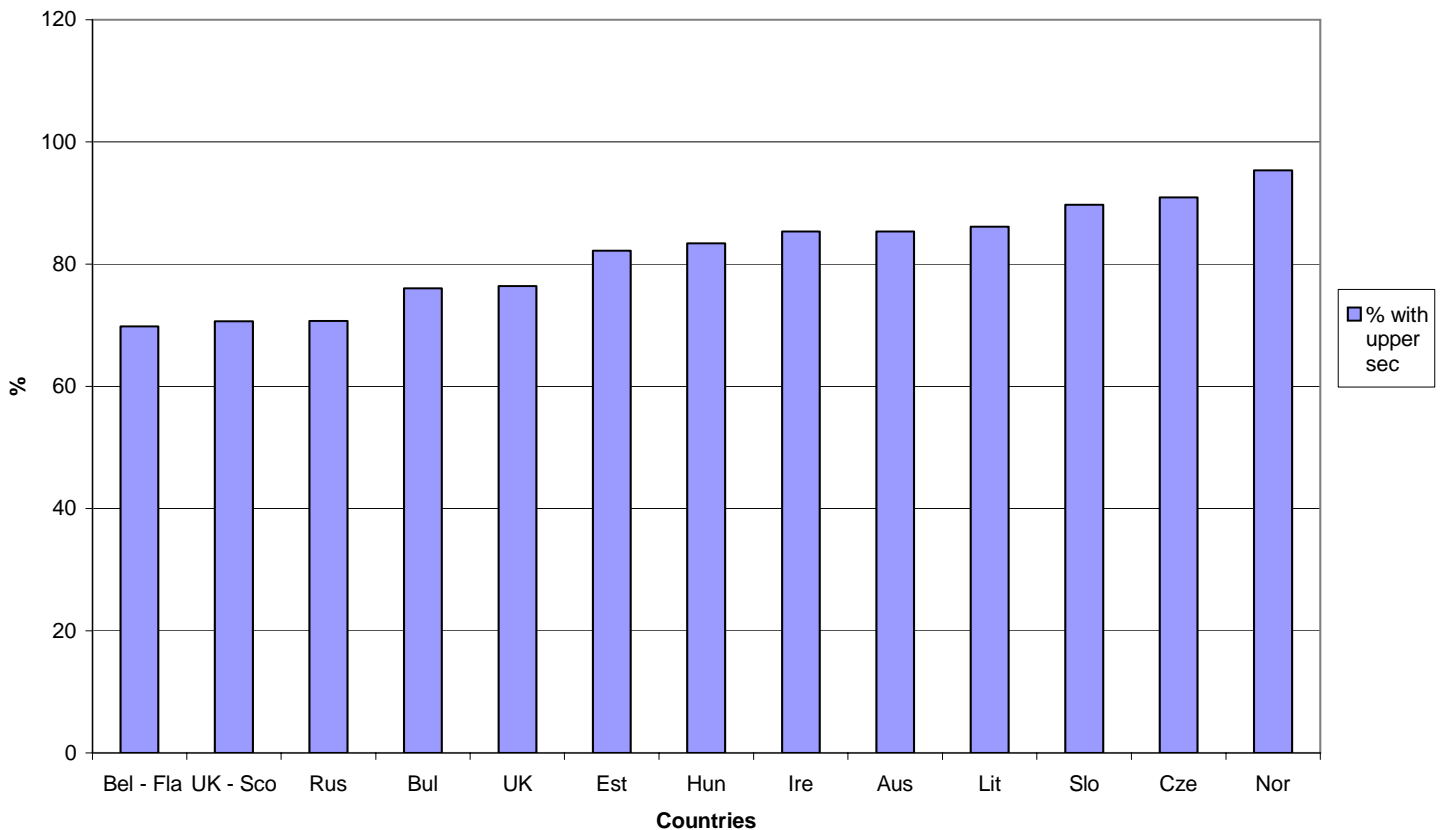
** 2001 figures, ***2002 figures



As noted above, the school system is seen as playing an increasingly important role in socioeconomic development. Most of the old and new EU states have comprehensive school systems for the compulsory states of education. Austria and Flanders have stratified systems, where entry to particular sectors is on the basis of academic selection. At least in Flanders, this is associated with low levels of educational attainment, as shown in the percentage of the population having completed at least upper secondary education (see figure 1 below). Whilst the countries are grouped fairly closely together, Scotland appears to perform relatively badly on this measure and Norway, which spends the most in absolute and relative terms, has the highest success rate in terms of completion of upper secondary education.

Figure 1 (Source: Eurostat)

Percentage with at least upper secondary education (2003)



Moving on to consider participation in lifelong learning, figure 2 below shows participation in formal lifelong learning (i.e. certificated courses delivered in school or college) drawing on 2003 Labour Force Survey Data. It is evident that the UK has a particularly high proportion of the adult population in formal education, followed by Norway and Slovenia. In the UK context, this is attributable in part to the development of non-traditional routes into further and higher education such as part-time study and distance learning, and open access arrangements so that students without formal qualifications may be admitted to higher level courses. This also reflects the relatively high proportion of young people in the UK who leave school without qualifications and therefore need to seek educational credentials at a later point. Of the old member states, Austria has a relatively low

proportion of adults in formal education, with Estonia and Lithuania having higher proportions of adults in formal education. Austria has a particularly rigid system of higher education, with students requiring formal qualifications for course entry and having to follow strictly pre-specified courses with no modularisation. As a result, many undergraduates who go straight from school to university do not graduate until they are nearly thirty, and the system is very difficult for adults without formal qualifications to access. Norway does not lead the field on this measure, possibly reflecting its success in helping young people to gain formal qualifications in the compulsory states of schooling. However, Norway is developing particularly innovative forms of non-formal education, with trade unions and employers working closely with educationists on work-based learning.

Figure 2 (Source: Labour Force Survey 2003)

Percentage of the population in formal LLL (2003)

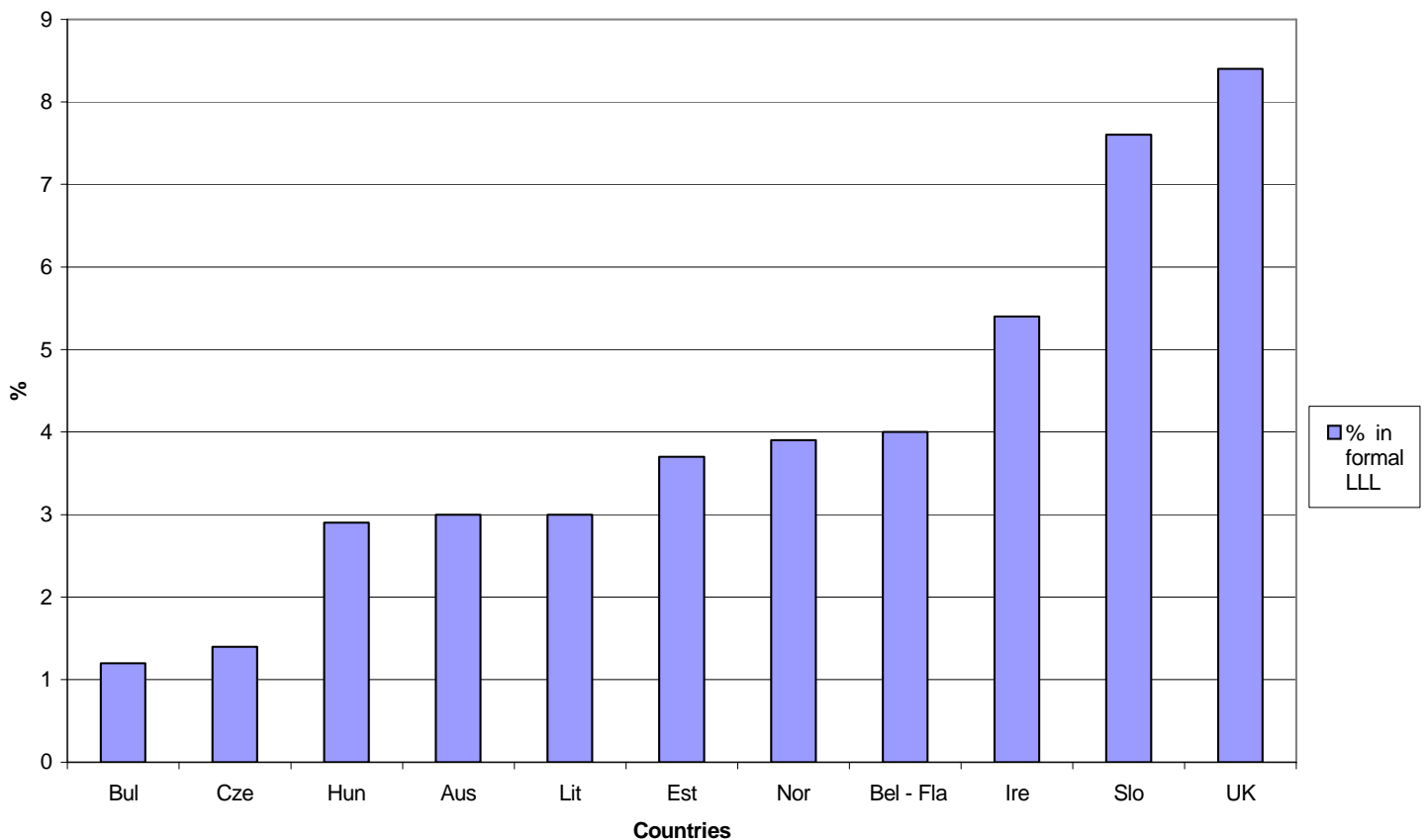
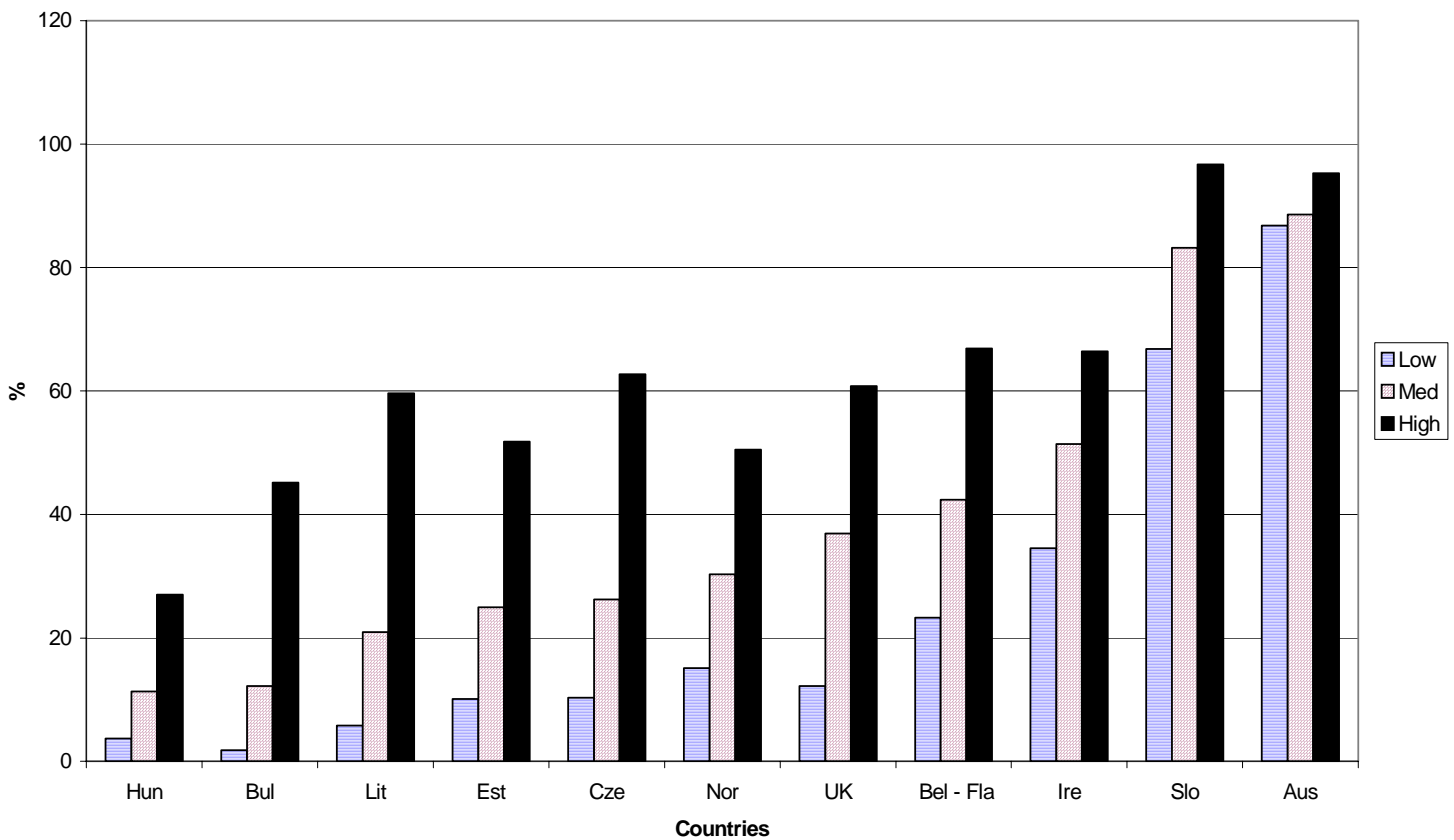


Figure 3 shows participation in any form of lifelong learning (formal, non-formal and informal) by educational attainment.

The broad pattern to emerge here is that in all countries, those with higher levels of educational attainment are most likely to be involved in any form of lifelong learning. In terms of the relative position of the countries, the data should be treated cautiously because of the inclusion of informal learning in some countries such as Austria and its exclusion from other countries. This problem was rectified in subsequent sweeps of the Labour Force Survey.

Figure 3 (Source: Labour Force Survey 2003)

LLL participation by educational attainment (2003)



Finally, we were interested in the relative emphasis within different countries' lifelong learning policies on the creation of human and social capital and on personal growth. It was clear that policies in all countries reflected the view very strongly that the development of lifelong learning was the key to future economic prosperity. However, the way in which this was done, and the institutions engaged in this enterprise, varied enormously. For example, in the UK and Ireland, flexible entry into higher education was prioritised. In Norway, work-based learning involving partnership arrangements was emphasised. Austria and Flanders had strong and well-developed (if somewhat rigid) systems of vocational education and training, and in the Nordic and Central and Eastern European countries, networks of adult education colleges were involved in the delivery of a variety of forms of lifelong learning. On the other hand, measures to promote social capital and personal growth were much less emphasised, although Norwegian policy appeared to place roughly equal value on lifelong learning as a means of developing a knowledge economy, creating socially cohesive communities and encouraging its citizens to engage in personal growth and development.

4. HOW APPLICABLE ARE EXISTING TYPOLOGIES OF WELFARE TO LIFELONG LEARNING?

On the basis of the discussion above, the countries in the study appear to fit, at least to some degree, into the following categories.

Scandinavian model

Norway has high GDP and high investment in all forms of lifelong learning, which are seen as contributing to human capital, social capital and personal growth. Systems are highly flexible and efforts are made to include those at risk of social exclusion, contributing to a relatively low poverty risk. Unlike the Anglo-Saxon model, labour markets are fairly tightly regulated. Norway exemplifies the new European socioeconomic model, combining economic efficiency and effectiveness with strong social inclusion measures, and in both these areas lifelong learning plays a central role.

Anglo-Celtic Model

England, Scotland and Ireland fall under this heading, with relatively high GDP, but low employment protection and relatively high risk of poverty, reflecting the wide spread in household income. There is relatively high participation of adults in formal education, and a major stress on lifelong learning as the means of generating economic prosperity for the future. In line with Ireland's traditional emphasis on education, lifelong learning, rather than social transfers tend to be seen as the means of tackling social exclusion.

Continental model

Austria and Flanders exemplify the continental model, with fairly rigid and stratified systems of compulsory and post-compulsory education, highly regulated labour markets but fewer efforts to include socially excluded groups through lifelong learning or social transfers.

Catching Up Model

Within this grouping of countries, there are some similarities, but also very wide variations. Lifelong learning is valued in terms of its potential contribution to economic growth. There

is less emphasis on using lifelong learning to combat social exclusion and the collapse of earlier social protection systems which existed in the Soviet era means that there is high risk of poverty (although the Czech Republic appears to be an exception here). Slovenia stands out from other Central and Eastern European countries and appears in many ways to be much closer to the old member states in terms of investment in compulsory and post-compulsory education, participation rates in lifelong learning and attention to the needs of groups at risk of social exclusion through access to adult learning opportunities and social transfers. However, it should be noted that the political situation in Slovenia is volatile, and a more right-wing government has been elected, with a commitment to enhancing economic growth and curtailing redistributive measures.

The organisation of compulsory and post-compulsory education in the Central and Eastern European countries still shows some influences from the Soviet legacy, but it is also possible to discern commonalities in education and lifelong learning systems which pre-date the Soviet era. For example, aspects of the education system in Hungary and the Czech Republic have certain commonalities with the Austrian system, with which there were clearly strong historical links. However, while data is limited, it is clear that the educational systems are changing in these countries. Tertiary education expanded considerably in the 1990s but the expansion was slower in Estonia than in Slovenia and Hungary (Kogan & Unt, 2005). Estonia's education system is now characterised by a high level of standardisation and a medium level of stratification (Saar, 2005). In addition, despite significant disparities in GDP, educational arrangements in the Baltic countries (Lithuania and Estonia) have some similarities with those of the Nordic countries, and these may develop further in the future.

CONCLUSION

Lifelong learning is clearly playing a major role in the development of the new European socioeconomic model, with its emphasis on economic efficiency and social inclusion. Within this overarching frame, there are key differences between particular country groupings, and the typology refined by Aiginger and Guger from earlier models appears reasonably applicable. Representing the Nordic approach, Norway, at one end of the spectrum, combines a regulated labour market with high social transfers and a flexible education system emphasising lifelong learning as a vehicle for economic development, social inclusion and personal growth. Countries within the Anglo-Saxon model have less regulated labour markets and less generous social transfers, and lifelong learning is used to combat social exclusion and promote the growth of a knowledge-based economy. Post-compulsory education is extremely flexible and provides opportunities for individuals to move between employment and education. Countries within the continental model are much less flexible and provide lifelong learning and other forms of protection and welfare to those within the labour market, rather than those who are outside it. The grouping together of Central and eastern European countries within a catching-up model is clearly inadequate. The indicators presented here point to significant differences between Slovenia, Estonia and Lithuania and Hungary and the Czech Republic. Antecedents of the Soviet era, including cultural features of the Austro-Hungarian and Baltic states, are still reflected to some extent in the educational systems of these countries, and may emerge as even more important in the future.

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APPENDIX 1 Data Contributing To Typology Of Lifelong Learning: Explanation Of Measures And Sources

GDP and total public expenditure on education as % of GDP (2003)	<p>GDP is a measure of economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation (Eurostat). The EU GDP is set at 100 and measures how much countries deviate from the EU average.</p> <p>This indicator looks at the percentage that each country spends on its education system. It also shows the extent to which each country deviates from the average EU GDP of 100.</p>
Employment rate (2005)	<p>The employment rate is calculated by comparing the proportion of those aged 15 to 64 who are in employment with those of the same age that are not in work. In the UK the rate is based on those aged 16-64; in Estonia and Hungary it is 15-74 and Norway 16-74. For further details see Eurostat and International Labour Organisation.</p>
Strictness of employment protection legislation (EPL)	<p>This measure refers to labour market regulation and the extent to which there are measures that protect employees (for further detail see OECD)</p>
At risk of poverty rate after social transfers (2003)	<p>Risk-of-poverty rate is defined as the proportion of people with an equivalised disposable income below the risk-of-poverty threshold, which is set at 60% of the national median equivalised household disposable income (after social transfers) (Eurostat).</p>
Welfare measures in place to support disadvantaged	<p>Measures for EU 15 drawn from European Commission 2002 <i>Communication from the Commission to the Council: Draft Joint Employment Report</i>. Other information drawn from National Reports</p>
Degree of stratification in education system	<p>This is based on information from Euridyce and looks at whether a country's system is comprehensive or stratified. A stratified system uses selection according to ability</p>
% of population having completed at least upper secondary education (2004)	<p>This indicator is based on Eurostat data. Upper Secondary = ISCED 3</p>

% of population participating in any learning activities (2003)	This measure is based on the Labour Force Survey and it includes all types of learning (formal, non-formal and informal) undertaken during a period of 12 months prior to the survey. It is based on a sample drawn from the 25 to 64 age group.
Participation in formal lifelong learning by those aged 25-64 (2003)	This indicator refers to education and training in the regular system of schools, universities and colleges. It is based on a sample and it includes any education or training undertaken during the past 12 months by a person. (Eurostat).
Participation in formal and non formal learning by those aged 25-64 (2005)	This measure is based on the Labour Force Survey and it includes some types of learning (formal and non-formal) undertaken during a period of 4 weeks prior to the survey. It is based on a sample drawn from the 25 to 64 age group.
Participation in lifelong learning by working status (2004)	This measure is based on the Labour Force Survey and it includes some types of learning (formal and non-formal) undertaken during a period of 4 weeks prior to the survey. It is based on a sample drawn from the 25 to 64 age group of those who are employed, unemployed and inactive.
Participation in LLL by educational attainment (2003)	Educational attainment is expressed by the highest completed level of education, defined according to the International Standard Classification of Education (ISCED) (OECD).
Emphasis on Human Capital in lifelong learning policy	This measure is based on the National Reports that each country team on our project prepared. It looks at the extent to which the development of human capital is stressed in the policy documents that relate to lifelong learning.
Emphasis on Social Capital in lifelong learning policy	This measure is based on the National Reports that each country team on our project prepared. It looks at the extent to which the development of social capital is stressed in the policy documents that relate to lifelong learning.
Emphasis on Personal Development in lifelong learning policy	This measure is based on the National Reports that each country team on our project prepared. It looks at the extent to which the development of personal development is stressed in the policy documents that relate to lifelong learning.

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.

Results achieved

The present summary covers the findings of the team during the first Sub-project, ‘Review of Literature and Policy Documents’; the full comparative report of the results of this Subproject will be made available on the project website by the end of 2007. The Subproject undertook comparative research on lifelong learning policies and practices. The aim was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe.

Purpose & Methodology of Sub-project 1

The purpose of the first Sub-project was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe. The nature of the educational and lifelong learning regimes in each country, and how they are changing, were investigated. The report considers how far lifelong learning has entered the policy rhetoric in each country, and in what forms it has done so – in particular, how far it has been shaped by the European Union’s thinking, or by national or other influences. It considers how far rhetoric and practice diverge in each

country. It also considers how far actions of different areas of policy and government support lifelong learning, or hinder its development.

The Sub-project applied a comparative documentary analysis of approaches to lifelong learning, through analyzing national policy documents and addressing lifelong learning in participating countries.

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, Bukarest, 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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