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The European Union's Lifelong Learning Policies: A Review

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INTRODUCTION: THE EUROPEAN UNION & LIFELONG LEARNING

One of the aims of the LLL2010 project is to explore conceptualisations of 'lifelong learning', the 'learning [or 'knowledge'] society' and the 'learning citizen' in European Union policy.

In undertaking this element of its work, however, the research team had to interpret the nature and purpose of this objective in the light of the overall aims and purposes of the project. The central focus of LLL2010 is 'the contribution of education systems to the process of making lifelong learning a reality and its [*sic*] role as a potential agency for social integration' (Project Summary); the critical analysis of EU policy which follows is to be seen principally as a contribution to that over-arching purpose.

This chapter therefore focusses on the extent to which European lifelong learning policies and initiatives address issues with which LLL2010 is concerned, such as human and social capital concepts, active citizenship, knowledge society and equal opportunities. Attention is also paid to the way in which policy co-ordination between the European and national level can contribute to establishing congruence in lifelong learning policies.

1. EDUCATION POLICY & THE SHAPING OF EU LIFELONG LEARNING

It is a commonplace that only with the Treaty of Maastricht (signed in 1992) did education become unambiguously an element of EU competence. Education was 'not explicitly alluded to in the Treaty of Rome, and there is little evidence to suggest that it was considered important to the original design of the Community' (Blitz 2003, 2). With rather minor exceptions (such as the decision to establish the European University Institute), education appears to have been a 'taboo subject' in debates at European level until the early 1970s (Blitz 2003, 4). In 1971 Education Ministers agreed an uncontroversial and non-binding resolution which 'aimed to provide the population as a whole with the opportunities for general education, vocational training and life-long learning' (Blitz 2003, 5), and in 1974 – influenced by the first enlargement – the Education Ministers agreed to encourage 'co-operation' in various priority sectors, while preserving 'the originality of educational traditions and policies in each country' (CEC 1979, 2).

These two themes, of co-operation and diversity, enabled the Commission to move forward while minimising conflict with member states. Blitz describes the 1970s decisions as 'declaratory resolutions … agreed at minimal cost to the member states', but sees them as important in providing a basis for incremental development, led chiefly by EU functionaries: 'co-operation generated further co-operation and new ideas about the role of education in the Community' (Blitz 2003, 15). However, what stands out is the tendency of policy development creatively to conflate education as a universal value with the economic requirements of the single market. At the same time, the Commission and the Community put little emphasis on lifelong learning in the 1970s, the principal, if marginal, exceptions being in relation to the education of migrant workers and transitions from school to working life – both clearly related to the single market.

With a policy in being, the 1980s saw a continued incremental extension in educational activities, helped by European Court of Justice decisions and the establishment of a Directorate General. However, the focus remained on a limited range of activities, chiefly in support of improved school curricula and quality, though with a marked European content. In a mid-1980s statement on 'The European Community and Education', concern with lifelong learning, as now understood, was limited: limited to school-to-work transitions and 'adult anti-illiteracy campaigns'; even the commitment to education for migrant workers was now cast very clearly in terms of supporting the education of the children of migrants (CEC 1985). In general, the downplaying of lifelong concerns in the Community's education policy in the 1980s mirrored the attitudes of most international organisations: from the mid-1970s to the early 1990s, international and inter-governmental bodies 'said relatively little' about lifelong learning, and the notion of lifelong learning as formulated in the early 1970s (most notably in the Faure Report (UNESCO 1972)) 'almost disappeared from the[ir] policy agendas' (Dehmel 2006, 51).

A key characteristic of lifelong education as conceptualised in the 1970s was its humanistic dimension. As many authors have pointed out, when lifelong learning re-emerged in national and international policies in the 1990s, the emphasis was firmly on aiding economic performance, whether individual or societal (Boshier 1998; Field 2006).

Within the EU, however, this was in some respects a distinct advantage. The Community's 'competence' in education had always been restricted. The principle of subsidiarity implied that most educational activity should be organised and governed by member states; and any attempt by the Commission (or any other Community body) to intervene in national educational affairs had to be based on the EC's core aims, as expressed in the founding treaties. This implied that advances had to be grounded in how far specific educational measures furthered the common market. Vocational education clearly fitted this aim; but wider desires to create a 'people's Europe' were now 'subservient to economic concerns' (Blitz 2003, 9). Instead, action programmes in the 1980s, such as 'Erasmus', had to be based on the need to strengthen the Community's economic position.

In providing a new foundation for the Community (or as it now became, the European Union) the Maastricht Treaty (1992) provided a new foundation for EU educational policy. For the first time, the Union itself had competence to make 'a contribution to education and training of quality and to the flowering of the cultures of the Member States' (Article G). This general aim was of course circumscribed by the principle of subsidiarity. More specifically, however, a number of aims of Community action were set out. These related chiefly to initial rather than post-initial education:

- developing the European dimension in education, particularly through the teaching and dissemination of the languages of the Member States;
- encouraging mobility of students and teachers, inter alia by encouraging the academic recognition of diplomas and periods of study;
- promoting cooperation between educational establishments;
- developing exchanges of information and experience on issues common to the education systems of the Member States;
- encouraging the development of youth exchanges and of exchanges of socio-educational instructors;
- encouraging the development of distance education. (Article G)

To the extent that the Treaty explicitly addressed lifelong (in the sense of post-school or post-initial) education or learning, it did so again in relation to the economic priorities of the Community. The Community was to 'implement a vocational training policy' which should aim to:

- facilitate adaptation to industrial changes, in particular through vocational training and retraining;
- improve initial and continuing vocational training in order to facilitate vocational integration and reintegration into the labour market;
- facilitate access to vocational training and encourage mobility of instructors and trainees and particularly young people;
- stimulate cooperation on training between educational or training establishments and firms;
- develop exchanges of information and experience on issues common to the training systems of the Member States. (Article G)

Following Maastricht, therefore, those in the Commission who sought to develop lifelong learning policy were both newly empowered and constrained. The EU now clearly had a remit to develop educational policy – no longer could member states object on principle to the Commission's work in this field. Unsurprisingly, initial education or schooling was

clearly at the forefront of the Treaty-makers' minds, and for this purpose there was a clear specification of areas of Community activity. A stronger 'European' dimension was also explicitly to the fore. In relation to lifelong learning, it is clear that the Treaty-makers saw the priorities as relating to vocational training.

The Treaty does, of course, provide general authority for the EU, and thus to the Commission, to make a 'contribution to education and training of quality'; and this provides a basis for policy development in areas not specifically itemised in the Treaty. It is, however, a more qualified basis, and inevitably a very general authority such as this is in practice even more seriously circumscribed by the requirements of subsidiarity.

2. LIFELONG LEARNING & THE ECONOMY

Given the legal framework within which the Commission had to function, it is hardly surprising that as lifelong learning re-emerged in international policy debates in the early 1990s, the Commission (through its DG Education and Culture) developed and conceived policy chiefly in support of the EU's economic needs. Brine (2006) and Field (2006), among many others, have located the origins of EU lifelong learning policy in the White Paper on *Growth, Competitiveness, Employment: The Challenges and Ways Forward into the 21st Century* (CEC 1993). The overarching concern of this document was meeting the challenges of globalisation, information and communication technology, and the competitive threat from Asia and the USA. However, a key theme was the threat of unemployment which would arise if these challenges were not met. In so far as it was a preparation for working life, at least, education could no longer be a single episode, however extended, in the early years of life. Lifelong learning 'and continuing training' were essential.

Growth, Competitiveness, Employment was not, of course, an education White Paper. In some respects, however, it was more important for that reason, providing as it did a legitimacy for lifelong learning as entirely consistent with the rationale for EU education policy provided in the Maastricht Treaty. The education White Paper, *Teaching and Learning: Towards a Learning Society* (1995), which followed two years later, was able to work from this starting point and develop a case for lifelong learning which sat firmly within the Maastricht framework. Although often criticised, for example for a 'complete lack of imagination and creativity' (Hake 1999, 66), Dehmel correctly acknowledges 'its crucial role in establishing lifelong learning as a guiding strategy in EU policies' (Dehmel 2006, 53).

From the mid-1990s, Dehmel (2006, 52) argues, the 'primarily utilitarian, economic objectives' which had brought lifelong learning to centre-stage in international policy debates began to be complemented by 'more integrated policies' involving 'social and cultural objectives'. Within the EU, and within the framework offered by the White Paper, a range of programmes (Socrates, Leonardo da Vinci, etc.) were launched, in which lifelong learning was at least a strong theme; 1996 was designated the European Year of Lifelong Learning; and so forth. Although not always couched explicitly in such terms, many of these programmes were in effect contributions to building a European identity, and to the construction of European citizenship.

From *Growth, Competitiveness, Employment* until 1999, EU lifelong learning policy 'was exclusively located in the post-compulsory sector' of vocational education and training (and, to some extent, in higher education) (Brine 2006, 653). Brine sees two kinds of learner represented in the published texts: the 'high knowledge-skilled' and the 'low knowledge-skilled': 'those that know and those that do not'. During the later 1990s, she identifies two 'discursive shifts' – changes in the way central aspects of language was used: where 'disadvantage' was initially associated with social exclusion, multiple deprivation and particular social groups, increasingly disadvantage was framed in terms of 'individual needs and responsibilities' – a shift, as it were, from a structural to an individual

explanation of disadvantage. And in parallel, there was a second 'discursive shift': 'from the White Paper on *Growth*'s aim of employment to a new one of *employability*: the ability to become employed, rather than, necessarily, the state of employment itself (Brine 2006, 652).

By the turn of the century, therefore, lifelong learning had been established as a distinctive feature of EU education policy. It was, to be sure, mirrored in the policies of some member states, and of a range of international organisations, and in that sense was by no means unique; but within the EU it had become an organising theme by which a significant range of educational policy was linked with other policy areas – notably economic policy and social exclusion. It was also the umbrella under which a number of progammes designed to strengthen Europeans' identification with the EU were located.

3. LIFELONG LEARNING & THE LISBON STRATEGY

The landscape of EU policy in the 21st century was set by the conclusions of the Lisbon European Council (March 2000). The EU set itself 'a new strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion' (CEC 2000). This was elaborated in relation to a number of areas of work, including a substantial section on 'modernising' the European social model and building an 'active welfare state'. A central feature of this was to encourage Europe's education and training systems 'to adapt both to the demands of the knowledge society and to the need for an improved level and quality of employment'. Adults (or more accurately, certain groups of adults) were given a central position, along with young people: specifically, 'unemployed adults and those in employment who are at risk of seeing their skills overtaken by rapid change' (CEC 2000). The document also included a slightly more detailed itemisation of the activities to be undertaken. *Inter alia*, there was to be 'a substantial annual increase in *per capita* investment in human resources'; a European framework for 'new basic skills to be provided through lifelong learning' (IT skills, foreign languages, technological culture, entrepreneurship and social skills); more elaborated mechanisms for 'mobility of students, teachers and training and research staff' through Community programmes (Socrates, Leonardo, Youth) and greater transparency and mutual recognition of qualifications (CEC 2000).

The Lisbon strategy was based on the key importance of the 'knowledge economy' to the future of Europe. The knowledge economy (and cognate terms such as 'knowledge-based economy' and 'learning economy') were much in vogue during the later 1990s, not least in EU circles (cf, e.g., Lundvall & Borras 1997), closely locked into discourses of modernisation and change. Brine (2006) has pointed out that not only did the Lisbon statement introduce the notion of the knowledge *society*, to complement the knowledge economy, but it did so with a consistency which suggests strategic intent. The 'knowledge economy' was used in relation to the high knowledge-skilled; 'knowledge society' in relation to the low knowledge-skilled. Moreover, this was carried through into specific policy concerns: graduate and postgraduate studies for the high knowledge-skilled in the learning economy; recurrent vocational retraining to increase employability for the low-knowledge skilled. '[W]ithin the knowledge society there is no reference whatsoever to higher education.' (Brine 2006, 654)

The importance of the Lisbon Strategy for lifelong learning is not, however, related only to its policies on lifelong learning and education. A key feature was the strong role given to the Open Method of Co-ordination, which had evolved during the 1990s but was now given a clear and approved role in policy development. The OMC has been the subject of extensive discussion (cf Hantrais 2007), but two elements are essential for lifelong learning policy: there was a restatement of the subsidiarity; but more important, the Strategy emphasised the importance of agreed timetables and goals, indicators and benchmarks, and 'monitoring, evaluation and peer review' (CEC 2000). The monitoring was part, of course, of the Commission's activities, but it was also of the EU's progress: and this implied – despite the emphasis on subsidiarity – an increasing level of intervention

in the policy and performance of member states. European guidelines were to be translated' into national and regional policies 'by setting specific targets and adopting measures', and by ensuring that monitoring, evaluation and peer review were 'organised as mutual learning processes' (CEC 2000).

The post-Lisbon years have, therefore, seen a marked increase in the rate of educational (and lifelong learning) policy-formulation, and in its level of detail and specificity. It does not, of course, attempt to organise lifelong learning or education within member states; Hantrais (2007, 71) maintains that the 'impact of European policy on the harmonization of education and training systems may … have been much less than anticipated'. In truth, it is very hard to separate the relative impact of the range of factors which influence national governments. The *prima facie* case that the extent of EU policy recommendation, monitoring and evaluation of progress against benchmarks using a developing range of indicators will have had a significant impact must deserve investigation; one of the aims of the LLL2010 research programme is to investigate how far member states' policies and practices have been shaped by the EU.

4. DEVELOPING THE LISBON STRATEGY

Since 2000, the EU – chiefly the Commission – has issued a range of policy documents. These have varying status: they include Commission Staff Working Papers (such as *A Memorandum on Lifelong Learning* (EC 2000)), Commission Communications (such as *Making a European Area of Lifelong Learning a Reality* (EC 2001) and *Adult Learning: It is never too late to learn* (EC 2006c)), and a Council Resolution on Lifelong Learning (27 June 2002). Together, they significantly raised the status of lifelong learning, though there is no little ambiguity within and between the various documents in terms of what is included within the term. In keeping with the emphasis established for the EU's role in education and training by the Maastricht Treaty, and in line with the predominant thrust of international policy literature, the strong emphasis remained on the role of lifelong learning in relation to economic needs – the knowledge economy (and the knowledge society conceived as a function of the knowledge economy).

The first document, *The Memorandum on Lifelong Learning* (European Commission, 2000a) is the first official document to set out a detailed strategy for lifelong learning. This document emphasises two important aims for lifelong learning: promoting active citizenship and promoting employability. As explained in Chapter 6, active citizenship is seen as focussing "on whether and how people participate in all spheres of social and economic life, the chances and risks they face in trying to do so, and the extent to which they therefore feel that they belong to and have a fair say in the society in which they live" (European Commission, 2000a, 5). Although there is acknowledgement that active citizens are "leading actors" in knowledge societies (European Commission, 2000a, 7), the notion of active citizenship deployed in the *Memorandum* has employability at its core: "the capacity to secure and keep employment" (European Commission, 2000a, 5).

Active citizenship, the knowledge society and employability are therefore posed as interrelated key concepts, and lifelong learning becomes not only an important contributor to maintaining economic competitiveness and employability, but also (mainly because of its role in building employability) "the best way to combat social exclusion" (European Commission, 2000a, 6). Indeed, Brine has described the *Memorandum* as focussing on "the construction of the individualised, pathologised LKS [low knowledge-skilled] learner" (Brine 2006, 655).

The *Memorandum* contains six "key messages" which form the basis for action in the area of lifelong learning: new basic skills for all; more investment in human resources; innovation in teaching and learning; valuing learning; rethinking guidance and counselling; bringing learning closer to home (European Commission, 2000a). Since the Commission considers knowledge and competences a powerful engine for economic growth, the European Employment Strategy (hereafter EES) was identified as a key vehicle through which, at the European level, coherent and comprehensive strategies for lifelong learning could be developed, measured and monitored (Stuart and Greenwood, 2006, 133). The definition of lifelong learning presented in the *Memorandum* was taken from the EES and is formulated as:

> all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence (quoted Stuart and Greenwood, 2006, 135).

During the consultation exercise which the *Memorandum* heralded it was agreed that this definition placed too much emphasis on a labour market approach to lifelong learning, while giving little attention to the broader non-work, social and community related conceptions of learning. Rather than focusing merely on a human capital approach, other aspects of lifelong learning, such as personal fulfilment, active citizenship and social inclusion needed to be given more attention (Stuart and Greenwood, 2006, 135).

The Memorandum had introduced (though it did not significantly develop) the notion that lifelong learning should be "enriched" by the "newly-coined term 'lifewide' learning", which draws attention "to the spread of learning, which can take place across the full range of our lives at any one stage in our lives" ((European Commission, 2000a, 9).[1] The Commission's Communication, *Making a European Area of Lifelong Learning a Reality* (2001), responded to "concerns that the employment and labour market dimensions of lifelong learning were too dominant", and extended the definition of lifelong learning to include:

> all learning activity undertaken throughout life, with the aim of improving knowledge, skills, and competences within a personal, civic, social and/or employment-related perspective (European Commission, 2001, 9).

Despite introducing this new definition, however, *Making a European Area of Lifelong Learning a Reality* "continued to prioritise the relationship between lifelong learning and employability" (Brine 2006, 655). There was the occasional reference to wider lifelong learning needs: for instance, "more resources are called for in respect of non-formal learning, especially for adult and community learning provision" (European Commission 2001, 19), but the main focus was clear.

This is not, however, to imply that *Making a European Area of Lifelong Learning a Reality* was essentially a repeat of the *Memorandum.* Its key contribution was in the development of mechanisms for policy implementaion, monitoring and evaluation, in the spirit of the Open Method of Co-ordination (OMC). It therefore contained proposals for spreading best practice and achieving greater convergence towards the main goals. It also began the process of establishing indicators and benchmarks as a means of comparing best practice, it proposed that European guidelines should be carried through into national and regional policies, and it suggested periodic monitoring, evaluation and peer review. The title of the final chapter ("Driving forward the agenda") perhaps gives the flavour of this most clearly; but it is by no means confined to the final chapter.

Brine (2006, 655) correctly maintains that *Making a European Area of Lifelong Learning a Reality* proceed on the basis of (and indeed extended) the notion of "individualisation" in the location of responsibility for lifelong learning. It emphasised the need for recognition and transfer of qualifications, and not only in respect of high-level qualifications. It laid

[1] Brine (2006, 655) suggests that the Communication *Making a European Area of Lifelong Learning a Reality* (CEC 2001) "introduced the concept of life*wide* learning"; it was, in fact, introduced in the *Memorandum* (2000), and is entirely absent from *Making* (other than by being defined in the Glossary (p. 33)).

emphasis on quality assurance, and counselling and guidance.[2] She also sees it as continuing and deepening the distinction between high and low knowledge-skilled learners (various categories of the latter are specified (European Commission 2001, 13)), and she argues persuasively that the document sees risk "as lying in the knowledge *society*, not the economy". "The individualised and pathologised learner was thus simultaneously constructed as '*at* risk' and '*the* risk' – the 'threat'." (Brine 2006, 656; emphasis in original).

The *Memorandum* and *Making a European Area of Lifelong Learning a Reality* were followed up and essentially endorsed in 2002 by a Resolution of the European Council. This saw lifelong learning as "cover[ing] learning from the pre-school age to that of post-retirement, including the entire spectrum of formal, non-formal and informal learning". It encouraged member states "to develop and implement comprehensive and coherent strategies reflecting the principles and building blocks identified in the Commission's Communication", and "in conjunction with the European employment strategy, to mobilise the resources for such [comprehensive and coherent lifelong learning] strategies and to promote lifelong learning for all". This would be achieved, *inter alia*, by "setting targets for an increase in investment in human resources, including lifelong learning, and optimising use of available resources". There was specific reference to several particular priorities, of which "to promote learning at the workplace" and "to develop strategies for identifying and increasing the participation of groups excluded from the knowledge society as a result of low basic skill levels" should perhaps particularly be noted.

[2] However, to say that *Making a European Area of Lifelong Learning a Reality* "introduced the notion of quality assurance and the need for guidance and counselling" (Brine 2006, 655) rather understates the importance of the Maastricht Treaty, which delineated the EU's role as contributing not to education or training *per se* but to "education and training of quality"; and it passes over (e.g.) the 1995 White Paper's emphasis on "information and guidance" as "the first condition" which is "necessary if individuals are to be able to exercise responsibility in building up their abilities" (CEC 1995, 16).

5. PROGRESS ON THE LISBON GOALS

A principal theme of the period since 2002 has been the development and elucidation of "benchmarks" and "indicators" which will permit the EU to measure and assess progress in lifelong learning (and education and training) on a consistent and fair basis across the EU's member states. For several years, therefore, the policy documents have a "heavy" feel: they are dominated by seemingly relatively technical issues in the formulation of benchmarks and indicators. The technical issues have clearly been substantial; but in social policy, technical issues are seldom merely technical. The 2004 Commission Staff Working Paper, *Progress Towards the Common Objectives in Education and Training: Indicators and Benchmarks*, for instance, explains that four of the 42 indicators presented to 'Spring summits' of the European Council were "specifically relevant for education and training". There were: "Spending on human resources", lifelong learning, science and technology graduates and early school leavers. However, it was apparent that the data available to construct these indicators was often rather imperfect:

> Due to the very large number of indicators necessary to cover the full range of policy fields involved in the follow-up to the Lisbon conclusions, efforts have been made by the Commission services and especially DG RTD and DG EAC to develop specific composite indicators on "investment in the knowledge-based economy" and "performance in the transition to the knowledge-based economy", …. Such indicators can in due time be applied to give an aggregated view of progress towards the Lisbon targets for the European knowledge economy. (CEC 2004, 10)

The construction of indicators is a far from simple process, and the Commission noted that the data available did not permit construction of indicators to cover all the 13 Lisbon objectives. "For example very important areas such as: Access to Information and Communication Technology, Active citizenship, Entrepreneurship or European cooperation are not covered by indicators." (CEC 2004, 13) In these areas, further work to choose or develop indicators was required; it has proceeded.

It is, of course, one thing for the European Commission to develop indicators and benchmarks; it is quite another to bring about change in member states' education systems. By 2005 it was apparent that progress toward the Lisbon goals in education and training (as in many other areas) was lagging. The 2005 Report *Progress Towards the Lisbon Objectives in Education and Training* (CEC 2005), asserted that meeting the objectives (or more precisely, the benchmarks set against the objectives)

> still pose a serious challenge for EU education and training systems. In the fields of increasing participation in lifelong learning and decreasing the proportion of low achievers in school education, the EU has made little progress up to 2003, the last year for which data is available (CEC 2005, 13).

The detailed data on which these conclusions were based – and the detail perhaps needs to be emphasised: is a document of 135 pages – revealed, for instance, that adult participation in education and training in 2004, at 9.4% across the EU, was 1.5 percentage

points higher than it had been 2000. However, part of the increase was due to “a break in time series in 2003”; before and after 2003 progress had been “only slow”. The objective of 12.5 per cent rate of adult participation by 2010 would require “Member States to step up efforts and to develop an integrated, coherent and inclusive lifelong learning strategy” (CEC 2005, 5). Perhaps as a result, there was a new rhetorical emphasis on the “high ambitions” involved:

> The onus put on European education and training systems by the institutionalisation of this goal [to become ‘the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth, with more and better jobs and greater social cohesion’ by 2010] is immense. The very nature of education and training systems has had to be thoroughly reconsidered to accommodate the changing needs and values of society and citizens (CEC 2005, 12)

6. OPERATIONALISING 'LIFELONG LEARNING': FORMAL, NON-FORMAL AND/OR INFORMAL

One of the submerged themes in the EU policy literature since 2000 has been the shifting of terminology. Sometimes, 'lifelong learning' appears to be regarded as a subcategory of Education and Training; sometimes it is a synonym for them; sometimes it is a broader concept within which education and training are an important part, but by no means the whole. In this respect, of course, EU literature is far from unique. The 1995 White Paper, though foregrounding the terminology of the 'learning society', explicitly linked itself to the 1996 European Year of Lifelong Learning: lifelong learning was an inclusive and largely undefined concept. As noted above, the *Memorandum on Lifelong Learning* (2000) had defined lifelong learning as "all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence" (CEC 2000, 3), while (following the consultation) this was revised in *Making a European Area of Lifelong Learning a Reality* (2001) to:

> all learning activity undertaken throughout life, with the aim of improving knowledge, skills, and competences within a personal, civic, social and/or employment-related perspective (European Commission, 2001, 9).

We have already noted that this extended the definition to include non-work related learning. However, two features of the revised definition deserve attention. First, the phrase "on an ongoing basis" was replaced by "throughout life": this made the lifelong dimension of learning far more explicit, since it allowed for learning which was episodic, rather than ongoing, over a person's lifespan. Second, learning no longer had to be "purposeful", although the learner was still required to have the "aim" of improving knowledge, skills of competences in some way. The implication of these was that lifelong learning included not only formal and non-formal learning, but also *informal* learning.

The notions of non-formal and informal education were originally developed in order to address learning which occurs outside the formal educational system (Coombs 1985; Coombs & Ahmad 1974). The strong policy emphasis in many countries on lifelong learning and on the recognition of learning undertaken outside the formal education system in recent years has led to modifications of, and attempts to operationalise, the typology, as well as to some important critiques. The fast-moving terrain has clearly presented major problems for measurement. The UNESCO International Standard Classification of Education (ISCED-97) offers the following definitions:

> Formal education (or initial education or regular school and university education): Education provided in the system of schools, colleges, universities and other formal educational institutions that normally constitutes a continuous 'ladder' of full-time education for children and young people, generally beginning at age five to seven and continuing up to 20 or 25 years old. In some countries, the upper parts of this 'ladder' are constituted by organized programmes of joint part-time employment and part-time participation in the regular school and university system: such programmes have come to be known as the 'dual system' or equivalent terms in these countries.

> Non-formal education: Any organized and sustained educational activities that do not correspond exactly to the above definition of formal education. Non-formal education may therefore take place both within and outside educational institutions, and cater to persons of all ages. Depending on country contexts, it may cover educational programmes to impart adult literacy, basic education for out-of-school children, life-skills, work-skills, and general culture. Non-formal education programmes do not necessarily follow the 'ladder' system, and may have differing duration. (UNESCO 1997)

ISCED, issued in 1997, however, offered no operational definition of informal learning. Eurostat, which by and large utilised ISCED definitions, has struggled to address this problem. In its *Taskforce Report on Measuring Lifelong Learning* (Eurostat 2001, 12) it described informal learning as "generally intentional but … less organised and less structured learning" which might include "for example learning events (activities) that occur in the family, in the work place, and in the daily life of every person, on a self-directed, family-directed or socially directed basis".

With rapidly-changing definitions, it was evidently sometimes difficult for all parts of the system to keep up. In a methodological note relating to the Labour Force Survey of 2003, for example, Eurostat stated that

> According to the European Union definition, "lifelong learning encompasses all purposeful learning activity, whether formal or informal, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence".

This was, of course, the definition amended two years earlier. On this basis, Eurostat noted:

> The intention/aim to learn is the critical point for distinguishing learning activities from non-learning activities (like cultural activities, sports activities etc) especially when discussing informal learning. The concepts used in the ad hoc module [of the Labour Force Survey] took into account the discussions on concepts and definitions included in the report of the Eurostat Task Force on measuring lifelong learning (TFMLLL) which was released in February 2001.

By 2007, Eurostat had adopted an example-based definition:

> informal learning corresponds to self-learning which is not part of either formal nor non-formal education and training, by using one of the following ways: making use of printed material (e.g. professional books, magazines and the like); computer-based learning/training; online Internet-based web education; making use of educational broadcasting or offline computer-based (audio or videotapes); visiting facilities aimed at transmitting educational content (library, learning centres, etc.). (Eurostat Yearbook 2007, 94)

7. SOCIAL CAPITAL & EQUAL OPPORTUNITIES

Active citizenship, employability, knowledge society and social inclusion are key concepts mentioned in EU and national policy documents. In addition to these key concepts, equal opportunity is a principle underlying the lifelong learning strategy. The European Parliament has strongly supported the view that lifelong learning is the key to ensuring social integration and to achieving equal opportunities (European Commission, 2000a, 6).

The European Social Fund (ESF) is a main initiative that aims to achieve the goals of social integration and equal opportunities. The overall aim of ESF is to 'promote economic and social cohesion', which is achieved by adhering to the goals agreed in the *European Employment Strategy* (EES) (European Commission, 2000b). From 1 January 2007 a new programming round for the Structural Funds began for 27 member states (including Bulgaria and Romania). During this round the links between the ESF and EES are reinforced so that ESF can contribute more effectively to the employment objectives and targets of the 'Lisbon Strategy for Growth and Jobs'. Particular importance is being placed on the strategy's three main objectives of full employment, quality and productivity at work, social cohesion and social inclusion (European Commission, 2000b). With regards to the objective of equal opportunities, ESF 2007-2013 will place particular emphasis on

> reinforcing social inclusion by combating discrimination and facilitating access to the labour market for disadvantaged people; … supporting specific measures to improve women's access to the labour market; … and supporting equal opportunities between women and men as part of a mainstreaming approach (European Commission, 2000b).

Although ESF activities also include 'promoting and improving training, education and counselling as part of lifelong learning policy', the new EU action programme in the field of lifelong learning 2007-2013 comprises several sectoral programmes on different levels of education focusing on European integration and equal opportunities. *Grundtvig* forms part of this action programme. Its aim is to

> improve the quality and strengthen the European dimension of adult education of a non-vocational nature by means of European co-operation activities of various kinds, thereby helping to make better lifelong learning opportunities more widely available to European citizens (European Commission, 2006a).

Through *Grundtvig*, the European Commission provides funding to promote exchanges of experiences and the development of a European dimension in all sectors of adult education. However, ratios between the three constitutive parts of the Socrates programme (which *Grundtvig* is part of), presented in the Table 5.1 below, illustrates the scope of *Grundtvig* programmes which promote non-formal learning and other forms of learning activities aiming at "social capital" enhancement; this is much smaller than the other two, which mainly focus on formal learning or educational attainment.

Table 5.1 Socrates Budget 2004 and 2006

SOCRATES BUDGET	2004	2006
School education (COMENIUS)	26,7%	25,5%
Higher education (ERASMUS)	52,5%	55%
Other educational pathways (GRUNDTVIG)	8,1%	8%

Source: EU Commission, Socrates ex ante budget, 2004, 2006

Implementing the new EU action programme will be achieved by improving the existing processes, including OMC, coupled with a stronger guiding and coordinating role for the European Council to ensure more coherent strategic direction and effective monitoring of progress. A meeting of the European Council to be held every spring will define the relevant mandates and ensure that they are followed up (European Report).

A final point worth mentioning in relation to equal opportunities, is the EU's initiative to organise "2007 – European Year of Equal Opportunities for All" (European Commission, 2006b). Its aim is "to make people in the EU more aware of their rights to enjoy equal treatment and a life free of discrimination" (European Commission, 2006b). 'Equal access to education' is one of the key aims mentioned on the website.

On the EU level, the most prominent mechanism for assessing and monitoring national developments in the area of lifelong learning is the Luxembourg Process of the EES. This process takes place in the context of an annual round of National Action Plans which are assessed by the Commission and the Council in a Joint Employment Report (hereafter JER) and fed back through National Employment Guidelines (Stuart and Greenwood, 2006, 139).

The Draft JER (2002) notes that *lifelong learning is still far from a reality for all*. The areas most pronounced in terms of 'partial' progress include the focus on disadvantaged groups; overall levels of investment and funding; and cross-cutting aspects. Furthermore, overall rates in participation by the adult population in education and training across all age groups are low and inequalities remain (Stuart and Greenwood, 2006, 139-141). These issues indicate a neglect of general and specific social capital initiatives, which was also addressed by a number of countries involved in the EC Project on lifelong learning (2005-2010).[3]

[3] It should be mentioned that, following the revision of the Lisbon Strategy in 2005, the European Employment Strategy (EES) was integrated with the European economic policy into the 'new partnership for growth and jobs'. There will no longer be separate employment guidelines, but 'integrated guidelines for growth and jobs'. Three-yearly 'national reform programmes' will be jointly monitored by means of an annual 'progress report', to be discussed at the annual Spring Summit. Among the integrated guidelines, guidelines 22 (expanding and improving investment in human capital) and 23 (adapting education and training systems in response to new competence requirements) refer most explicitly to lifelong learning. Whereas this revised strategy obviously subordinates lifelong learning to economic objectives, it simultaneously acknowledges the indispensable role of lifelong learning at the heart of the EU's common agenda.

8. EUROPEAN QUALIFICATIONS FRAMEWORK

In the context of creating a knowledge society, the European Commission places emphasis on establishing a *European Qualifications Framework* (EQF) (European Commission, 2005b). The development of an EQF is considered an essential contribution towards the Lisbon Strategy, as it meets the need for a continuous updating and renewal of knowledge, skills and wider competences (European Commission, 2005b, 8).

The EQF framework would be developed and implemented on a voluntary basis, not entailing any legal obligations. The objective of the planned EQF is to facilitate the transfer and recognition of qualifications held by individual citizens, by linking qualification frameworks and systems between national and sectoral levels. National authorities are responsible for developing a *National Framework of Qualifications* and link this single national framework to EQF. The EQF framework will function as a translation device and will be one of the main European mechanisms intended to facilitate citizen mobility for work and study, alongside for example, Erasmus, the European Credit Transfer System and Europass (European Commission, 2005b, 4, 5).

9. ADULT LEARNING: EFFICIENCY & EQUITY?

Two important EU publications relating to lifelong learning appeared during 2006: the Communication from the Commission to the Council and to the European Parliament on *Efficiency and Equity in European Education and Training Systems* (CEC 2006d) and the Communication from the Commission entitled *Adult Learning: It is never too late to learn* (CEC 2006c). Together, these suggest significant shifts in the rhetoric of EU lifelong learning policy; whether they represent any major change of direction is less certain.

Rhetorically, in neither document are the knowledge economy, or the knowledge society, prominent terms. In *Efficiency and Equity* there are two references to the latter, and one to "knowledge based economy and society"; all are deep in the body of the paper. In *Adult Learning*, neither term appears at all. Similarly, references to the Lisbon objectives, while not entirely absent, are reduced in number and prominence in comparison with earlier policy documents.

Efficiency and Equity is concerned to point governments toward the best areas in which to make investments in education and training. It argues that "pre-primary education has the highest rates of return of the whole lifelong learning continuum, especially for the most disadvantaged, and the results of this investment build up over time" (CEC 2006d, 3). It argues against separation of children into separate schools based on ability before the age of 13, as this "exacerbate[s] the effect of socio-economic background on educational attainment and do[es] not raise efficiency in the long run" (p. 7). It argues, however, for differentiation in higher education, free access to which "does not necessarily guarantee equity" (p. 8).

The paper hardly addresses adult learning except through the medium of vocational education and training, where it notes that the less well-qualified "are least likely to participate in further learning and so to improve their employment prospects" (p. 9) It argues, for "clear and diverse pathways through VET to further learning and employment" (p. 11). It takes the view that courses for "the unemployed and those who have not succeeded in the compulsory education system" are "important" in "equity terms", and that such people "require access to publicly-funded adult training schemes". However, it asserts that "the track record of such schemes in improving the employment prospects of disadvantaged adults has been generally poor" (p. 10), and proposes that this situation can be improved by targetted programmes "based on partnerships between business, the public sector, social partners and local third sector organisations". It also argues that "training must be strongly linked to employers' skill needs" (p. 10), especially the skills needed in "the regional and local economy" (p. 11). Although the language of the knowledge economy and the knowledge society has disappeared, the distinction between high knowledge skilled sheep and low knowledge skill goats remains.

Adult Learning (CEC 2006c) is also situated in the context of educational policy development in an increasingly diverse range of member states. In order to meet Lisbon strategy benchmarks, four million additional adults would have to participate in lifelong learning. Adult learning leads to legion benefits (employability, reduced welfare expenditure, better civic participation and public health, and so forth), but "has not always gained the recognition it deserves" (p. 3). It is posed as relevant to competitiveness, demographic change (chiefly ageing and migration), and social inclusion.

In contrast to initial education, adult learning is characterised by a wide diversity of "learning providers and settings". "Better coordination and partnerships are vital to improve coherence, avoid duplications and contribute to more efficient spending of scarce resources." (p. 5) Beyond this, however, it tends to state problems rather than prescribe or suggest solutions. Barriers to participation need to be lowered: several are listed, but how they are to be lowered is not specified in detail – though "public authorities must take the lead" (p. 6). Member states should invest in improving quality of provision: staff, teaching methods, providers, delivery systems, all need to be addressed: but again, there is little detail on what needs to be done. There should be "sufficient investment in the education and training of older people and migrants", though "above all" they should "ensure efficiency by designing education and training which matches the needs of the learner" (p. 9). The clearest specification are in relation to implementing "systems for validation and recognition of non-formal and informal learning", within the European Qualifications Framework (p. 8), and to improved data for indicators and benchmarks. In general, EU documents on adult learning tend to emphasise the importance of recognising non-formal and informal learning, rather than on drawing adults back into the formal sector.

SUMMARY

Lifelong learning has become a key term in the EU lexicon. In recent years, it has in some respects displaced and stood for “education and training”, though it has had some success in drawing attention to a wider role for learning in the “learning society”. From the outset, EU policy in education has been constrained by a vocational orientation; this is noticeable in all documents. The economic orientation was reinforced by the Maastricht Treaty, although this itemised certain other issues (e.g., quality); while it did not prohibit developments in other directions, it did set EU educational policy on a particular course. This economic and vocational course was strengthened by the economic framing of lifelong learning discourse in the 1990s. With the growth of the EU, and the need to establish a European identity, a stronger orientation toward “citizenship” would have been desirable; given the shaping of EU education and training discourse, attempts to build the citizenship agenda have met with very qualified success.

Key conclusions from this chapter include:

- EU education and lifelong learning policy have been shaped by the demands of competitiveness, and the requirements of subsidiarity;
- a European dimension in education is becoming increasingly apparent,
- the terminology relating to lifelong learning has evolved rapidly, causing some uncertainty and even confusion;
- the *Memorandum of Lifelong Learning* and subsequent policy documents represent a significant forward movement, beginning to draw together disparate national education policies across Europe,
- active citizenship, knowledge society and employability are interrelated key concepts in EU policy documents on lifelong learning;
- there is a strong differentiation in most EU lifelong learning policies between the needs of the high-skilled and those of the low-skilled, and the strategies required to address their needs;
- lifelong learning is seen as a key way of addressing social exclusion, as well as being a key to economic competitiveness and employability. In recent documents, the focus on social exclusion tends to widen, so as to include equity arguments;
- establishing a *European Qualifications Framework* (EQF) is a key priority.

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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.

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 Sub-project 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.

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