

Comparing Policies in Lifelong Learning

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Adult learning and education policies in Germany, Portugal and Sweden: An analysis of national reports to CONFINTEA VI

Abstract

The chapter presents a theoretical proposal of three analytical models of Adult Learning and Education (ALE) policies. Some analytical categories and the corresponding dimensions are organised according to the ALE rationale which is typical of each social policy model. Historical, cultural and educational features are mentioned in connexion with the different policy models and its interpretative capacity to making sense of policies and practices implemented in Germany, Portugal and Sweden. The analysis includes the states of the art and the official representations of ALE produced by the respective national authorities through national reports which were presented to CONFINTEA VI (2009).

Introduction

The analysis of adult learning and education (ALE) policies is a complex task, but it is crucial to understanding the multitude of supranational guidelines, governmental measures, strategies of public and private organisations, educational practices developed by schools, educational centres, social movements and civil society organisations, in addition to the study of certain individual lifelong learning dynamics.

Whenever we study educational reforms, priorities and objectives, projects and activities, ALE methods and practices in national and local, organisational or micro level contexts it is impossible to escape from certain core questions: What ALE conceptions are present? What are the priorities and goals to achieve? What are the most important concepts, methods of education, forms of organisation, administration and financing? What are the teaching methods, and who are the target groups and participants in educational activities? And on what grounds are they these and not others? Why is there not always consensus on these options? What are the dominant approaches and interests at national, local and international level? Who has the power to shape the educational guidelines that are followed by most national, regional and local governments? Why is public funding available for certain ALE activities but not for others? What are the most influential international and supranational organisations and how do they build and spread

their political agendas for ALE? What is the role of the state, civil society and the market in developing the policies and practices of ALE?

Considering that learning and education are cultural, socially constructed phenomena, its political nature, i.e. its politicity, is always based on worldviews, on choices that depend on certain agendas and certain interests. Even when, as now, the consensus seems evident and is apparently shared worldwide, resulting in ALE policy guidelines we call hegemonic or dominant guidelines, there are always other possibilities, divergent interests, alternative projects. There is always political activity (politics), not only in the state context but also dependent on different conceptions of the role of the state in social policies. This political action gives rise to decisions and choices that are then translated into legislation, programmes and measures, educational conceptions and learning modes, forms of regulation and provision of education we generically call education policy.

This means that ALE policies always result from discourses and practices, guidance and actions, the global setting of priorities and rules not only located in the transnational and supranational level (mega level) and national level (macro level), but also in concrete organisational contexts (meso level) and even through different forms of reception and action in small contexts of social interaction (micro level). Although the available resources, authority and power differ widely between these levels of analysis, levels whose scale is at a lower level, are certainly affected but not fully determined by the higher levels. The learning and education of individuals in specific contexts of social action is always influenced by the decisions of the most powerful political and institutional actors, but it is never a simple copy or perfect reproduction of these influences.

There are contextual, cultural, educational and other circumstances that can facilitate the exercise of margins of relative autonomy by states, organisations, social groups and individuals. The study of policies in action, of the recontextualisation of political decisions in different social contexts and of any distinct educational appropriations already requires empirical studies. It requires analysis of actors and educational activities in specific social contexts, which, while of great relevance in the investigation of policies and practices, is not, however, the purpose of this chapter.

This chapter will briefly introduce some analytical models of ALE social policies that can support the interpretation of the action developed by international institutions (such as the United Nations Educational, Scientific and Cultural Organisation – UNESCO), by supranational actors (like the European Union – EU), or by national and regional governments, public and private organisations and others. We shall only use the proposed analytical models to interpret some policy

documents produced by government agencies from three countries of the EU that sought to offer a “state of the art” of ALE for presentation at the International Conference on Adult Education (CONFINTEA VI) organised by UNESCO in 2009 in Brazil, in the city of Belém do Pará. This does not mean that the theoretical proposals presented here are not useful for the analysis of concrete ALE actions and models and lifelong education practices, just that this task would not be possible within the objectives and limits of this text.

Analytical models of adult learning and education

The theoretical proposals that are presented here have their origin in research work that was initially developed by Lima (2005) and the subject of several courses in universities in Germany and other European and Latin American countries. This research work, as well as the accumulated teaching experience, were later resumed and deepened. In this process of review and academic development, which was incorporating other authors and other theoretical approaches, the doctoral work of Guimarães (2011) is emphasised, and this led the two authors to present an integrated joint proposal on analytical models for ALE social policies (Lima & Guimarães 2011). The authors have subsequently published analytical work on ALE policies, including a historical interpretation of the Portuguese situation from the democratic revolution of 1974 to the present day (Lima & Guimarães, 2015), an analysis of certain shorter historical periods, and government programmes developed in recent years in Portugal (Guimarães, 2013; Lima 2013). They have also directed courses and seminars in various countries and have developed educational tools on the interpretation of ALE policies in various national and international contexts. With another author they also produced a preliminary analysis and comparative policy documents on the participation of EU countries in CONFINTEA VI (Barros, Guimarães, Lima, 2012). In this chapter, they decided to work in collaboration with a young researcher from Germany (Nathalie Touma) to provide an interpretation of government representations on the state of the art of ALE in Germany, Portugal and Sweden, focusing on certain categories of analysis that are set out below and which include the above-mentioned publications.

Theoretical and methodological considerations

Three ALE social policy analytical models will be briefly described, referring readers who wish to look at this proposal in more detail to the book by Lima and Guimarães (2011):

the democratic-emancipatory model, in which democratic participation and critical education are very important in relation to ALE actions, in particular popular and community education; *the modernisation and state control model*, based on public provision, the intervention of the welfare state and generally dominated by second-opportunity education guidance; and *the human resources management model*, in search of economic modernisation and the production of skilled labour, led by vocationalist ideologies for the production of human capital.

These are models that, thanks to their breadth, seek to understand the very different public policies adopted in countries and regions that are themselves also very different.

Despite the identification of three distinct ALE public policy models, independent of each other, it is important to note that their construction is part of a continuum or imaginary theoretical line where each model occupies a specific position. This means that the three models, although different from one another, are not exclusive and can even coexist. So cross-fertilisation or hybridisation is possible: rather than rigid and artificial possibilities of analysis, it is expected that these models can be regarded as heuristic devices for understanding public policies on ALE. The discussion on the developments in ALE based on policy documents and public policies implemented by various countries therefore shows that, in a particular period, one or two models had a higher profile than the others, or other. But the dominant character of any one model at a particular time, at the expense of the previous ones, does not mean that the subordinate models simply vanish from the scene, tending towards a *marginal survival*, sometimes offering active resistance and at others persisting in a restricted, muted or modest form. In fact, though many countries favour policies based on the human resources' management approach and on appeals to the market and civil society, other models are also used: some are linked to strong state intervention in the development of adult education and training systems or to engaging civil society in the promotion of various public provisions. Since there may be some crossovers in the models the reality can be marked by a considerable hybridism of policy decisions, which should be examined in light of the models proposed.

The public policy models on ALE are characterised through different categories of analysis, each of which comprises several intrinsically consistent dimensions. These analytical categories are: *political-administrative guidelines, political priorities, organisational and administrative dimensions, main conceptual elements of public policies.*

Political-administrative guidelines

These orientations relate to the laws, rules and norms that allow a public policy to be adopted. They consist of the legislative apparatus that provides the means for a policy to be implemented and include the establishment of conditions for accessing ALE initiatives and the involvement of the people attending them, the financing, controlling and evaluation of the actions proposed, and the organisation and management related to the development of these activities.

Political priorities

The political priorities concern the ends assigned to ALE, and the domains that a public policy focuses on, the relevant objectives and targets, target-groups and the amount of public funds allocated.

Organisational and administrative dimensions

These relate to the organisation, administration and management involved in adopting a public policy, including centralised and decentralised structures, the procedures and technical processes involved in carrying out ALE activities, quality assurance processes, evaluation and accountability procedures.

Conceptual elements

These are concerned with the theoretical references underlying the ends, methods and processes inherent to implementing a public policy, for instance, ALE conceptions, pedagogical models, forms of participation and assessment, etc.

The democratic-emancipatory model

One of the most significant aspects of this model is the influence of critical pedagogies that uphold an idea of education as lifelong, humanist, aimed at social development, and promoting social responsibility, a collective destiny, and democratic and cosmopolitan citizenship (cf. Lima 2005). From this viewpoint, public policies are instruments of social, economic, political, and cultural action for the state. The state is thus a determining agent for planning and intervention (Griffin, 1999a, p. 334), although open to challenge with respect to bureaucratic state control and under pressure to undertake democratic and participatory reinvention, particularly through social movements. A multi-faceted view of development (social, economic, cultural, and political) and participation (social, political, and civic) is allied to this understanding. One of the political priorities of this model is to build a democratic

and participatory society by means of a fundamental social right: education. Concerns with solidarity, social justice, and the common good are important and justify the establishment of basic education and education for democratic citizenship programmes, and the setting up of a broad range of initiatives to promote a civic sense and a critical and thoughtful capacity (cf. Guimarães, 2011).

With respect to the conceptual elements of this model, attention is drawn to the educational (not simply instructional) nature of the initiatives, through which local cultural traditions are valued, along with the adults' own life experience and understanding of the world. Based on ethical and political principles, often associated with participatory action-research in coordination with programmes backed by social policies (for childhood, the third age, vocational training, or for fighting poverty, including local job promotion, rural development initiatives, etc.), these actions' chief goal is to promote critical-based education, aimed at the transformation of decision-making power, and at social change.

There is a concern here to connect the individual facet of the act of learning to the collective facet of what is learned. The goals of learning are above all of a social and indirectly academic nature. Learning starts in social relations, continues throughout life, in all its aspects, based on social needs and leading to educational programmes that are meant for adults and their perceived needs. Here, the education and learning contexts are expanding to other areas (apart from school) in life, and there is a flexibility of times and spaces in which to learn, as there is in content and methods (cf. Sanz Fernández, 2008, p. 82).

In terms of the political-administrative guidelines, the actions implemented under the democratic-emancipatory model are noted for the decentralised control of education policy and administration and for the high degree of autonomy enjoyed by the organisations that stimulate ALE actions, including those linked to civil society and social movements.

This critical education model has had a major impact in different contexts of ALE. Until the mid-20th century in Europe, workers' groups and trade unions, folk high schools, social movements, pedagogical missions, and so forth sought to build a "project to promote political and civic awareness in citizens" (Finger & Asún, 2001, p. 97). Influenced by the ideas of the Enlightenment or by others that are about workers' and trade union education, many of these projects were designed to solve the problems faced by societies and benefited from charitable and voluntary work.

For example, in Sweden, a number of bodies were created after 1868 to implement actions to promote education (*folkbildning*). These organisations were notable for their freedom, independence of thought and autonomy and they developed

group activities, open classes, and other initiatives that aimed to meet specific educational needs. At first these popular education initiatives were attended by landowners, and later the workers used them as a way of gaining power (cf. Norbeck, 1979; Vallgård & Lima, 1985; Larsson, 1998, 2001).

Among the popular education actions undertaken in Sweden and other Scandinavian countries, study circles have turned out to be particularly significant initiatives in terms of fostering democracy, self-management and critical and transforming education (cf. Vallgård & Norbeck, 1986; Larsson, 1998, 2001).

In Germany, the Society for the Propagation of Popular Education, founded in 1871, was set up to support the development of popular emancipation movements. This body worked to set up other organisations that would spread culture and knowledge, establish public libraries and increase the number of classes and presentation sessions open to the public. University outreach was also invigorated and here the aim was to disseminate academic knowledge in accordance with the principles of the Enlightenment (cf. Nuissl & Pehl, 2000, p. 11; Lattke, 2008, p. 41). This Society's efforts, and those of others in the field of popular education, led to that very expression, *popular education*, becoming widespread. Popular education started out as education of ordinary people who were distinguished from those who had an erudite culture. It was an elementary, entry-level, education that expressed boundary between the various social groups and between other bodies that stimulated job-related training actions and received public funds in return (cf. Nuissl & Pehl, 2000, p. 12; Lattke, 2008, p. 41). This was how civil society gained strength, becoming self-organised and demanding, with respect to both the state and the market.

Portugal developed later and it was not until, initially, in the First Republic (1910–1926) and then after the democratic revolution in 1974, that democratic and emancipatory initiatives were developed with government support. These actions were fostered by state bodies, but to an even greater extent by non-state ones, in all kinds of projects and programmes. The popular education activities that were developed in the wake of the 1974 revolution (April 25th) elucidated this aspect, in particular the work done between popular associations and the Ministry of Education through the General Directorate of Permanent Education. Several quite separate initiatives were implemented, in particular the literacy programme, cultural and socio-educational projects, basic education actions, etc. In this complicated historical context there was an explosion of highly varied initiatives, actions included in community development projects undertaken by popular associations, by relatively informal groups that were motivated to respond to requests that emerged in local communities.

The modernisation and state control model

This model values education in a context of social and economic modernisation. In light of the interplay between democracy, economics, society, and culture, education policies seek to unite functions that favour the processes of accumulation and legitimation, emphasising the interventionist, dirigiste character of state action. With a backdrop of a Fordist work pattern, the state controls the means and ends of public policies, for which it profits from a mandate to achieve certain goals and outcomes that target social justice, equality, family and community solidarity, and social cohesion. As education is an essential pillar of social policies in the construction of a democratic capitalist state, it involves a set of processes that are directed at ensuring equal opportunities for everyone, especially for those who are less able to get education and training. The rules associated with increasing and expanding opportunities of access to successful education are getting more and more attention from the government. Its impact is therefore increasingly evident in practice, leading to the formalisation and bureaucratisation of processes (cf. Lima, 2005). This model stresses the *functional* nature of education, in which the welfare state fosters economic growth and full employment. Education, seen above all as the teaching given in school, is essential to training citizens (cf. Griffin, 1999a).

The most striking conceptual elements are related to reducing the field of adult education to formal and second chance education and to stressing the importance of targeting vocational training at promoting economic growth. This is why the conception of ALE in this model is largely reduced to the tasks of “reading, writing, and arithmetic”, to learning of an academic, educational nature and to school-type vocational training. Memorising is emphasised and read texts are the main source of dialogue with the reader. Sanz Fernández says that it therefore promotes “receiving and mastering literacy”. Seeking to “discipline the adult population” and to “educate to obey”, it advances the instrumental (not social) use of reading and writing, and the results of education practices illustrate the efforts at social control and the reproduction of social inequalities (Sanz Fernández, 2008, p. 75 ff.).

In the European countries that share the welfare state format adult education took a form that is reminiscent of the centrality of the state in the context of specific historic circumstances (cf. Guimarães, 2011). These circumstances led to some countries putting in place mechanisms for formal education (for example, instruction and compensatory education) and non-formal education (retraining and professional adaptation, promotion of social participation, etc.) that were more structured than those seen up to the 2nd World War.

But there were variations. These are evident in the political ends which aimed to integrate workers as citizens into the modern state; they were intended to meet

the expectations of the people (and their children); and they guaranteed the public funding of education and training (cf. Esping-Andersen, 1990; Mishra, 1995; Giddens, 1999; Law, 1998; and others).

In post-war Germany, for example, adult education was directed toward new goals related to *re-education for democracy*, through political education (*Politische Bildung*) promoted by community education centres, by the education centres in the *Länder*, and by foundations. Companies, faith-based organisations and trade unions kept up the impetus for educational formats that already prevailed (cf. Nuissl & Pehl, 2000, p. 13). The schools, meanwhile, proposed a varied range of evening courses, lectures, courses on literature, religion, history, politics and music, the teaching of German and foreign languages, improving health, and so forth. They were voluntary activities and often involved people who already had some knowledge of the topics covered. On the whole these bodies did not offer courses that led to a diploma. Despite the range of programmes not many workers took advantage of them. It was different for boarding schools, since the content varied in terms of the trade union, religious, economic or social tendencies favoured by whoever ran them. Diversity also characterised the adults who took part in these initiatives; it was argued that these boarding schools helped to forge a high degree of social cohesion since they brought together people from different social groups (cf. Raapke, 2001, p. 188).

ALE played an important part in promoting the ideas of the Enlightenment until the 1960s and, as since then it integrated education policies, the responsibility of the state was obvious. It seemed that actions run by civil society bodies in the same decade had these goals diverted, since in an increasingly more plural context the organisations were more reliant on their ideological positions (religious and trade union related, for example) (cf. Nuissl & Pehl, 2000, p. 14).

But it was felt that the state should be responsible for stimulating a *fourth sector in the education system*, one that was stable and solid. This new sector included areas like continuing vocational training, political education and liberal education for adults (cf. Lattke, 2008). In 1970 the state, through the national education council, sought to incorporate different facets of the education system. It aimed to structure and organise *centrifugal tendencies* that were apparent in education, especially in adult education. That was when another expression emerged, continuing education (*Weiterbildung*), to describe the rebuilding of adult education; this expression came to include continuing vocational education, vocational retraining and compensatory adult education of a non-formal nature (cf. Raapke, 2001, p. 188 ff.). The older expression for ALE (*Erwachsenenbildung*) kept its association with liberal, general, civic and political education (cf. Lattke, 2008).

In Sweden, after World War II, popular education (*folkbildning*) emerged as the fundamental domain for promoting social change. In this it was a progressive force, a *reformist project in development*, since “the study circles have been educational arrangements which have chosen contents, forms and participants so as to promote social change” (Larsson, 1998, p. 58). But the dialectics established between popular education and Swedish society became less obvious after World War II. For example, since then the state has been supporting folk high schools and paid the monitors of the study circles, the teachers and the administrative staff. It has also given scholarships to students. It should be noted that these institutions nonetheless enjoyed a high degree of autonomy; they could set goals, decide on the nature of the education (usually comprehensive), teaching methods (usually active) and the participants, who came from various social groups (though these mostly belonged to the working middle class), and the length of most of the courses (short, medium or long duration) (cf. Vallgård & Lima, 1985).

Meanwhile, with consolidation of the welfare state, the minimisation of social problems and increasing income earned for work led to the emergence of *active social policies* as a determining factor for economic stability and the promotion of full employment. As a result, training programmes aimed at integrating people into the labour market were implemented and so, as Rubenson says, the reform of adult education demonstrated the influence of the theory of human capital (cf. Rubenson, 2004). In the same vein, the successive reforms in the second half of the 20th century allowed the formal education system to expand to include more and more people. *Recurrent education* appeared as a basic idea used to argue that everyone should enjoy equal rights with respect to education, regardless of their social origin, gender, etc. (cf. Rubenson, 1994).

In Portugal this rationale became clearer after the Basic Law for the Education System and Portugal’s membership of the European Economic Community (EEC). In terms of priorities, therefore, we should note the return to educational guidance and second-chance education, i.e. compensatory education. This return was confirmed by the emphasis given to second-chance education in evening classes. Supplementing the endeavour to modernise the economy, this rationale downgraded issues of literacy, basic education and popular education. These were areas of intervention seen, as far as public policies were concerned, as being generically incompatible with the idealised place and coveted status of an EU country whose main challenges were identified with its economic modernisation and in relation to infrastructure, with the efficacy and efficiency of public and private management, increasing productivity, and internationalisation and competitiveness in the economy (cf. Lima, 2005).

The human resources management model

This model stresses the withdrawal of the state that is justified by the internationalisation of the economy, global competition, and diminishing public resources (cf. Guimarães, 2011). Despite the problems arising from an adverse economic, social, and political context, public policies favour the maintenance of redistributive principles, given that lifelong learning remains a way of providing education and training (a function of the state) and that it embraces the concern of preserving the state's strategic ability to establish policy, albeit on an increasingly short or medium-term basis. But the state is also losing control of the purposes of education. The reduction of its ability to determine the results of these policies has become clearer, despite the efforts to regulate and the adoption of measures of enforcement (cf. Griffin, 1999a, 1999b).

Although education retains an important collective dimension, the individual acquires new responsibilities. Among these are “learning to adapt oneself” to the changes being faced, and “being able to choose and decide” about the best options for the social and economic transformations taking place. This is where we find education and economics drawing closer, in an appeal for greater productivity, competitiveness, and flexibility; and it is in this context that we find an understanding of education (training and learning) as an investment, with frequent analogies between training and financial capital. In these policies, learners are those who “learn throughout life” in places and at times outside the school context, and those who are “better educated”, that is, those who have spent more time at school, and are “better trained” in terms of knowledge and skills related to the workplace. Some degree of interaction between the school and the lifelong learning strategies outside this organisation is thus sought. Although they have different emphases, these policies are backing the maintenance of state involvement, while they denote a distance from training policy and planning and a nearness to “government strategies” (Griffin, 1999a, p. 339).

The human resources management model focuses on the acquisition of competences (which are not promoted in the provisions currently available in the education systems). The term *competence* may embrace a wide variety of meanings; here, it is taken to be something that adults should have, because it is believed that each individual must have the “competence needed to compete”, namely to gain employment (cf. Lima, 2005). Despite its relevance, competence has been viewed as knowledge acquired by each individual from his/her experience in different non-formal and informal contexts. Above all, it has a utility value. It shows that individuals are able to carry out a specific task. In addition, competence has been seen as measurable ability and knowledge that has yet to be assessed and formally

documented. Consequently, learning is to convert one-self “into one of the most attractive investments for businessmen and one of the priority claims (besides pay and health) of workers”. In this scenario, “the productivity and competitiveness of economic agents are based on their ability to process and apply knowledge effectively” (Sanz Fernández, 2008, p. 94).

In Germany the possibility of establishing a permanent training market was discussed in 1984. It would be linked to giving adults qualifications with the aim of combating unemployment. Although it was not fully followed, according to Nuissl and Pehl, this discussion marked the start of the steady withdrawal of the state from ALE by instituting competition between promoters of adult education, at federal level and within the states (*Länder*). But even today the *Länder* retain certain control and regulatory functions, typical of the welfare state (cf. Nuissl & Pehl, 2000).

Since then, according to Raapke (cf. 2001), though deregulation has not been complete, there have been important reductions in the financial, material and human resources bestowed on adult education. These reductions had an unequal distribution: in some places ALE seemed to strengthen its position since some public organisations still had some budgetary independence, but market mechanisms appeared to rule in others. But the overall responsibility of the state declined and it now has fewer responsibilities for adult education; in fact it was often argued that adults should take charge of their own education and training and that state support could only be justified in very special circumstances or for particular social groups. So training for the common interest involved some tension, since the state and local authorities still controlled and funded some initiatives, though this represented only a small part of continuing education (*Weiterbildung*).

In Portugal the policies adopted from the end of the 1990s, like adult education and training, which can be related to this model, tended toward modernisation “so as to respond positively to the so-called *challenges* of European integration, requiring the state and public administration to make a greater structural effort and devise active policies for integration and convergence”. These concerns were not completely unknown in Portugal since, even in the 1950s, the significance of modernisation and the content of measures dependent on efforts to develop the economy were discussed. But after Portugal joined the EEC and adopted policies influenced by guidance issued by this supranational body, the emphasis was on ideas like “useful learning”, “acquisition of skills to compete”, “lifelong upskilling” and “education for employability”. It was asked to adopt measures that were “instant and short term that chose ‘trainability’ over education, and individual

responsibility over social responsibility and collective destiny, as pillars of the proposed policies” (cf. Lima, 2005, p. 46).

The recognition of learning acquired throughout life became a central issue in policy discourses in recent times in Sweden. This involved several risks. With respect to the Northern European models of the welfare state and adult education, in the last twenty years universalist and focused on employment, they have faced two threats, according to Rubenson. The first concerned political discourses in which education was strengthened as long as it considered the needs of the market and individual responsibility in adapting to the challenges that the knowledge economy entailed. In these discourses the needs of individuals, especially those arising “from the needs of the labour market”, were the starting point for planning the provision of education. The second threat was linked to lifelong learning as public policy and individual project. In this context the collective efforts of the social movements and the associations that were promoting the study circles, for example, were downplayed and the traditional connection between civil society and popular education came out weaker (cf. Rubenson, 2004, p. 44).

This reasoning is based on the idea popular in political discourses that Swedish society, like other countries, is at risk and so the skills of its people are important to the construction of a knowledge economy. Everyone should have the competences that make them employable, and in this context the recognition, accreditation and validation of competences are essential. The skills that people develop during the course of their life should be utilised. In this regard, Andersson and Fejes state that the validation of competences was introduced into the discourse and public policies in Sweden in 1996, thereby increasing the chance of gaining qualifications. It also allowed education and training to develop to be more useful and relevant to people, since “there was no need to learn what was learned in the past”. Competence took on a new meaning, stressing its usefulness (cf. Andersson & Fejes, 2005).

Analytical categories and dimensions

The three analytical models briefly presented here simultaneously comprise heuristic dimensions of research and didactic dimensions. They should be viewed as proposals open to social research and to the historical, cultural and educational diversity of the different contexts under study. This means that there may be a need to increase the number of models or to build sub-models and specifications within some or all models now presented. They are not the realities and political specificities of ALE that are expected to integrate perfectly into the

three analytical models proposed, instead they are the analytical models that should prove sufficiently open and flexible to handle the multiplicity of social policies of ALE.

A greater degree of openness is required in the case of aspects which are indicated below for each of the four categories of analysis presented earlier (Table 1). The inventory offered by the authors is merely indicative, in terms of both theoretical consistency and empirical occurrences in various contexts that have been studied over the last decade. Just as policy documents such as the national reports submitted to CONFINTEA VI are often marked by a certain “rhetoric” (Keogh, 2009, p. 9), by normative and mobilisation aspects that are typical of the role historically played by UNESCO (Milana, 2014), by dominant approaches and concepts of fashion, so, even in the case of our interpretation of instruments, it is necessary to avoid the nominalist approaches that reduce complexity, contradictions and paradoxes present in political speeches to the search for certain words or concepts. It is not, for instance, because legislation or a government report repeatedly mentions the words *democracy* and *participation* that they can immediately be integrated in the *democratic-emancipatory model*. There are, of course, several concepts and very distinct practices of democracy and participation, so it is necessary to understand the political-educational rationale and the historical and cultural context in which these concepts should be interpreted. In practical terms, it is more plausible to find practical situations that are characterised by the need to muster different analytical models simultaneously rather than a single pure and internally consistent mode.

Table 1: Analytical policy models of ALE (Adapted from Lima & Guimarães, 2011)

Rationales predominating in adult learning and education policies (Social Policies Models) Categories	Democratic-Emanicipatory Model (Dimensions of DEM)	Modernisation and State Control Model (Dimensions of MSCM)	Human Resources Management Model (Dimensions of HRMM)
Political-administrative guidelines	<ul style="list-style-type: none"> * Polycentric education systems based on participatory democracy * Decentralised control of policy and administration of education * Appreciation of bottom-up dynamics * Support of local, self-managed initiatives * Leading role of education associations and social movements [...] 	<ul style="list-style-type: none"> * Appreciation of education in the effort to modernise, encouraging efficacy, efficiency of public and private management, increasing productivity, the internationalisation of the economy and competitiveness in capitalist democracies * Centralised control of policy and administration of education by the state (supply-side) * Appreciation of state intervention as guarantee of universal, free public education [...] 	<ul style="list-style-type: none"> * Leading role ascribed to the market, civil society and the individual (demand-side) * Adoption of active policies for integration and convergence in EU context * Combination of logic of public service and programme logic, although the programme logic in EU backed projects dominates * Promotion of partnerships between state and other institutional actors [...]

Rationales predominating in adult learning and education policies (Social Policies Models) Categories	Democratic-Emanicipatory Model (Dimensions of DEM)	Modernisation and State Control Model (Dimensions of MSCM)	Human Resources Management Model (Dimensions of HRMM)
Political priorities	<ul style="list-style-type: none"> * Construction of a democratic and participatory society * Integration of basic, non-governmental groups in the definition and adoption of public policies * Solidarity, social justice, common good * Education established as a basic social right * Political, economic and cultural change * Education and training as process of empowerment [...] 	<ul style="list-style-type: none"> * Literacy programmes and encouragement of functional literacy * School education as means of social control * Appreciation of school-based guidelines * Second-chance education * Recurrent education and evening school for adults * Vocational training with school influence * Support for formal education according to formal rules and bureaucratic processes established by the welfare state [...] 	<ul style="list-style-type: none"> * Fostering employability, competitiveness, economic modernisation through education and training * Education and training as instruments of human capital and adaptation to economic imperatives * Education for adaptive function; citizenship for the market of consumers' economic freedoms * Development of vocational training * Upskilling, economically valuable skills * Certification of knowledge acquired by experience (from school and vocational) * Appreciation of market logic and individual choice [...]

Rationales predominating in adult learning and education policies (Social Policies Models) Categories	Democratic-Emanicipatory Model (Dimensions of DEM)	Modernisation and State Control Model (Dimensions of MSCM)	Human Resources Management Model (Dimensions of HRMM)
Organisational and administrative dimensions	<ul style="list-style-type: none"> * Appreciation of intervention of civil society (associations and community sector concerned with adult education, popular associations) * Local self-organisation, autonomy and creativity of bodies behind initiatives * Participatory forms aiming at collective decisions, i.e. participatory budget [...] 	<ul style="list-style-type: none"> * School as central organisation in public adult education policies * Courses for young people and adults * Strongly educational administrative and management procedures [...] 	<ul style="list-style-type: none"> * Adoption of managerialist, procedures for induction and management of human resources * Appeal to non-state organisation (third sector and market) involvement * Partnerships * Creation of state management and administration structures having some independence, though with limited scope for educational intervention (minimalist structures, for induction, mediation) [...]

Rationales predominating in adult learning and education policies (Social Policies Models) Categories	Democratic-Emanicipatory Model (Dimensions of DEM)	Modernisation and State Control Model (Dimensions of MSCM)	Human Resources Management Model (Dimensions of HRMM)
Conceptual elements of public policies	<ul style="list-style-type: none"> * Adult education as a sector characterised by heterogeneity and diversity * Appreciation of basic education, popular education, basic literacy, socio-cultural and socio-educational animation * Educational nature of the actions, appreciation of collective knowledge and experience * Ethical and political dimension of education * Participatory action-research projects, participatory research * Basic civic education (aims at political and economic democratisation, power relations transformation, social change, empowerment) [...] 	<ul style="list-style-type: none"> * Formal education of adults as a social right * Integration of non-formal education into the public education system according to the latter's rules * Education as instrument for promoting equal opportunities * Appreciation of vocational training (according to educational guidelines) * Adult education as second-chance education and recurrent education * Education for modernisation and economic development of the nation state [...] 	<ul style="list-style-type: none"> * Vocationalism and continuing vocational training * Production of human capital * Continuing training aimed to remedy obsolescence of vocational knowledge, retraining, recycling * Useful learning and education for employability * Lifelong upskilling and acquisition of skills to compete * Recontextualisation of active methods and participatory techniques (like collaborative work) * Resemanticisation of ideas like democracy, participation, autonomy, freedom * Promotion of trainability and individual responsibility [...]

National reports as policy documents and representations of ALE

National reports submitted to CONFINTEA VI are ALE policy documents that are particularly useful for drafting a preliminary analysis based on the three analytical models proposed by Lima and Guimarães (2011). Indeed, these documents represent rational choices made by government authorities in each of the participating countries as to what in that historic moment they understood to be the organisation, priorities and the development of ALE. They are, therefore, government representations of social policies of ALE that have been adopted internationally, involving historical and cultural aspects, and perhaps some diversity of policy guidelines. In each national report we can find normative statements and implicit and explicit definitions of ALE as a field of policy and practices. The limitations of these documents are, moreover, those which depend on the greater or smaller distance between policy statements and the dominant social representations on the one hand, and effective and practical achievements in terms of specific activities and projects of ALE, on the other.

Political-administrative guidelines

As mentioned before, Germany has a tradition in the field of public policies on ALE (Nuissl & Pehl, 2004), as stated in the report under consideration. In line with this expression and with that tradition, this domain refers to processes that happen after primary education and carry on throughout life but not including higher education. Over the past four decades, public policies for this sector have been framed by the *Deutscher Bildungsrat* of 1970, which states that ALE is the “the necessary and lifelong complement to initial education (...), the continuation or the recommencement of organised learning following completion of the training phase of whatever length” (Germany, 2008).

This broad definition of ALE could fit a wide range of policies. The role assigned to the state of defining values and principles of action plays a part in this finding, particularly when the report in question states that

“The activity of the state in the area of continuing education is generally limited to the stipulation of principles and basic parameters and to the introduction of rules to ensure that continuing education is properly organised and supported” (Germany 2008, p. 147).

It goes on to say that “Continuing education is less regulated by the state than other areas of education. The field of continuing education features a high level of pluralism and competition among providers” (Germany, 2008, p. 147). This raises the possibility that aspects of a range of ALE policies are likely to be found.

This likelihood is reinforced in the document under review since it mentions the intervention of other local actors such as non-governmental and non-profit organisations that could be closer to democratic and emancipatory policies and critical adult education practices of a participatory and transforming nature. But the German report emphasises the implementation of activities by state and non-state organisations related to work and employment, both commercial and non-profit. Therefore, although it can be said that in terms of principles and values the possibility is mentioned that the principles of three different models of public policy could be adopted, stress is nonetheless placed on aspects consistent with the models of modernisation and state control and of human resources management.

The range of entities involved in the public provision of ALE and the implementation of very varied provision indicates the importance accorded to the intervention of the *Länder*. The *Länder* have expertise in setting priorities and specific targets, taking into account the local dimensions in educational provision. This is why instances arise that can play a significant role in establishing and controlling the public provision (Germany, 2008, p. 156), in monitoring and evaluating the educational provision and in setting up local networks (Germany, 2008, p. 152). Because of the contextualised nature of the intervention of the *Länder*, possibilities of alternative intervention with respect to the state may arise. However, due to the centrality ascribed to the economic development in public policy on ALE in this country, there seems to be a strong relationship between the state and entities related to vocational training, private, for-profit and sectoral, which can be seen, for example, in the level of funding allocated to this sector (Germany, 2008, pp. 161–173). This option seems to favour the adoption of public policies to modernise and control, coordinated with other human resources management policies that cater to concerns about economic growth and increased productivity.

The Portuguese report differs from the other two because it takes adult education to mean “adult education and training”. In keeping with this expression, this document only gives importance to basic education, i.e. to school certification, and to vocational training by obtaining the professional qualification and there is no mention of other sectors such as local development, which has a long history in this country, popular education, socio-cultural activities and so on. This preference for a more restricted expression for ALE certainly comes from a lack of tradition in public policy, as well as the intermittent and discontinuous nature of many of the programmes implemented in Portugal in the last five decades (Lima, 2005).

In implementing ALE public policy, the state seems to be a key player in the context of just one action programme, the New Opportunities Initiative. Accordingly, the focus is on central government bodies in the formulation and

adoption of this policy strategy. While the two other reports talk about different levels of intervention, central and local, the Portuguese paper highlights the role of public state bodies at central level, with no mention of other agencies, state or non-state, in the definition of public provision.

It says, however, that to achieve the goals of ALE public policy, other state and non-state entities, commercial and non-profit, are involved, but does not address the role of these organisations in other areas of ALE, nor is any kind of autonomy foreseen in the design, development or evaluation of provision included in the New Initiatives Opportunities. Moreover, it is envisaged that local-level entities should develop public provision, although the report in question does not make it clear what tradition these entities have in ALE, or what interaction can be achieved between a pre-defined intervention programme that has strict operating rules and these entities, with their knowledge of the localities in which they operate. It thus seems to note an instrumentalisation of various entities regarding political purposes chosen based on problems that seem to have a national meaning, such as the Portuguese “educational backwardness” and the lack of competitiveness of the national economy, without any consideration of the needs, expectations and motivations of local promoters and individuals.

As for the Swedish report, this has been drafted in a country with a long tradition in ALE public policy, particularly in the context of popular and non-formal education (Larsson, 1998). Regarding state action, there is a commitment to coordination between principles and priorities, actors and different levels of intervention. The report under consideration stresses the role of the state in setting policy priorities and intervention strategies. In this regard, it says that,

“The role of the state is to create the opportunities for versatile learning and the national strategy to support both organised and non-organised learning situations” (Sweden, 2008, p. 4).

While the state has the task of establishing the principles, values and guidance of public policies, it is at local level that the public provision is developed, specifically the setting of goals and the educational outcomes to attain. Thus, ALE in this country is decentralised (Sweden, 2008, p. 3), as it is locally, in the municipalities that public provision is organised and implemented.

Like the German and Portuguese reports, this document also states that the purpose of the educational policies is to make Sweden a nation with a lifelong learning system of high quality, directed at economic growth and in line with the model of public policy for modernisation and social control. But, unlike the two other reports, there is a strong emphasis on ALE, which this document identifies as “adult education” on promoting social justice, democracy and citizen participation

(Sweden, 2008, p. 4). Thus, it stresses interaction between the collective and individual dimensions of education, between promoting economic development and enhancing democracy, and between achieving equal opportunities and meeting the interests and educational needs of citizens. While the state retains the tasks of establishing priorities and developing public provision, through, for example, the allocation of funds (Sweden, 2008, pp. 13–15), this report contains a clear focus on the individuals, their interests and motivations, and their social and personal development. In this context, the intervention of local ALE entities has proved to be essential. There seems to be a commitment to interaction between the state, which provides conditions for the development of ALE policies, and local authorities, very varied, whether state or non-state, and the individuals in developing relevant learning that is useful to them (Sweden, 2008, p. 5), under the democratic and emancipatory guidelines and in light of other modernisation and social control guidance.

Political priorities

Participation in ALE arises in the three reports in question as a key political priority. This priority follows the trend of increasing adult participation in ALE actions recorded in many other countries (Bélanger & Federighi, 2001) particularly noticeable from the 1990s. In line with this trend, the reports in question underscore the importance of maintaining and increasing levels of participation, though in different ways.

In the German report, the main priorities identified suggest there are public policies that seek to create a comprehensive system of lifelong learning, which can refer to a combination of models, with the spotlight on democratic and emancipatory policies. In this regard, it says that adult education aims “to enable [people] to develop their personal, professional and social prospects free from the daily pressures of work in a way that extends beyond merely updating their skills for the workplace” (Germany, 2008, p. 171).

This document highlights the need to encourage all citizens to take part in ALE, by accomplishing equality of opportunities and respect for the voluntary nature of participation by adults. It also looks closely at strategies for the social inclusion of certain social groups, such as the elderly, the 50-plus initiative (2007), and immigrants, with reference to the 2005 Immigration Act and the National Integration Plan, 2006. It also includes the development of provision in areas as diverse as combating poverty, basic education, vocational training, environmental education, for example, in the context of UN Decades and political and civic education (Germany, 2008, pp. 158–160).

Many of these initiatives are intended to strengthen inclusion and social cohesion and share the educational goals specified by the state, in order to build an integrated lifelong learning/training/education policy. Note however that this report also emphasises that increased participation in ALE should consider economic development, particularly when it states that “Continuing education and lifelong learning are key prerequisites for the strengthening of innovative potential in Germany” (Germany, 2008, p. 160). This emphasis falls on the priorities of modernisation and social control and human resource management. At the same time, the focus of various programmes on the elderly and immigrants is based on a desire to make the German economy competitive within Europe and worldwide, and there is a perceptible stress on the role of ALE in increasing productivity and flexibility of the individuals in the labour market. These concerns clearly approach the human resources management approach.

The Portuguese report mentions the aim of increasing participation rates in ALE by increasing the levels of basic education and vocational qualification certification of the Portuguese population in an effort to accomplish modernisation and social control policy guidance. That purpose is stated in a single programme: the New Opportunities Initiative. This purpose is supplemented with another that envisages ALE public policy interacting with economic development strategies such as the National Employment Plan and the Technological Plan (Portugal, 2008, p. 2), in which case the concern with the principles of modernisation and social control and human resource management is evident.

These purposes arise in the context of globalisation and the restructuring of the Portuguese economy, also in keeping with the lifelong learning perspective established by the EU as part of human resources management principles, and with values related to social cohesion aimed at the integration of different participants in ALE, in line with the modernisation and social control and democratic and emancipatory models.

Concerns about participation are important in the Portuguese report, although there are no explicit references to particular social groups that may be in disadvantaged situations in educational terms. While this is an interesting justification, it is still strange to choose a single priority, that of including a significant number of adults in two ALE certifying and/or qualifying provisions in a short time, given that the established time frame runs from 2000, when the indicated provisions were created and 2010, the end of the New Opportunities Initiative. We can thus see the temporary nature of a programme that calls for an urgent solution to a longstanding problem in Portuguese society, with strong generational impacts, as some tables in the report show (Portugal, 2008, p. 5). For this reason as there

is no structural policy on ALE in Portugal, the report seems to have bet heavily on the New Opportunities Initiative to solve problems that have long been a feature of the national economy. This finding becomes clearer when we look at the example of the elderly and of immigrants. All the reports analysed contain references to immigrants, accompanied, in the case of the German and Swedish reports, by data concerning population ageing and specific public provision for this social group (e.g. German and Swedish courses for foreigners). Quantitative data in the Portuguese report indicate the existence of an ageing population and a foreign population (Portugal, 2008, p. 8), although there is no mention anywhere of educational and/or training provision aimed at these individuals.

In line with the objectives established for its public policy on ALE, Sweden's report stresses the role of this domain in the interplay between economic growth and consolidation of democracy, pointing to features of the modernisation and social control and democratic and emancipatory models. In this regard, the report cites the Education Act Chapters 1–9 when it states that,

“The activities within the national adult education system shall be structured in accordance with fundamental democratic values. Each and every person who is active within that school system shall promote respect for the intrinsic value of every human being and for our common environment” (Sweden, 2008, p. 9).

In connection with the consolidation of democracy through the stated purposes, special emphasis is given to the individual, particularly the personal aspect of life in society, though the collective aspect of individual action is not ignored, i.e. with respect to social differences. Thus it says that, “Adult education should also contribute to providing the individual with opportunities for growth and development and reducing gaps between groups in society” (Sweden, 2008, p. 4).

In the report, state action is addressed relative to the individual dimension, particularly when it says that it is responsible for this task of promote opportunities for individuals to develop learning in a variety of times and contexts. For this reason, it mentions principles that entities locally entrusted with implementing the public provision must respect, such as educational flexibility (particularly in methods and information and communication technology) and favouring conditions for learning to continue throughout life. It also reinforces the idea that these principles must meet the interests, needs and abilities of individuals (Sweden, 2008, p. 4), particularly those at greatest educational disadvantage. As it says, ALE is,

“Primarily to those who have received the least education shall here be given an opportunity to strengthen their position in working life and in cultural and political life” (Sweden, 2008, p. 8).

The Swedish report also highlights the importance of gender equality in the public provision as well as the valuing of knowledge acquired through experience, through validation. It also stresses the importance of ALE in integrating individuals with special needs, including immigrants who can attend different educational activities about Swedish culture and language, organised by the municipalities and publicly funded (Sweden, 2008, p. 10).

It is within priorities that focus mostly on the subjects, according to a humanistic view of education, which can be taken as the characterisation of adult participation in ALE. While, in the German report, increased attendance of ALE activities is particularly linked to the intervention of the *Länder* whose priority is to facilitate access and increase participation, in the Swedish report another factor seems to contribute to participation levels that are already high compared with those of other countries: the range of provision open to people, including basic education, upper secondary education, supplementary education, municipal education for adults with learning disabilities, Swedish tuition for immigrants, independent supplementary education, advanced vocational training, distance education provided by the Swedish Agency for Flexible Learning as well as folk high schools and study circles (Sweden, 2008, pp. 16–20).

Thus, in Sweden, the call for participation is made in the context of diversification of educational provision, both formal and other non-formal. The need for ALE to meet the interests, motivations and needs of the individuals is highlighted at various points throughout the document, and these may or may not be linked to problems related to employment and work, depending on the principles of the democratic and emancipatory model.

One cannot help but notice that, to add to the range of provision available in Sweden, the report also highlights the 1997 Adult Education Initiative, designed to improve the skills of the workforce, particularly in the case of social groups with poorer skills. As with the political priorities identified for this country, this programme also seeks to combine several objectives:

“The initiative has had four vital perspectives – the renewal of labour market and education policies, more equitable distribution and increased economic growth” (Sweden, 2008, p. 19),

and for this reason it accentuated the role of ALE in economic development and human resources management.

Organisational and administrative dimensions

It is in the organisational and administrative areas that aspects that fall into the policy models of modernisation and social control and human resources

management in all countries. In the German report, national public policies are defined by the Federation and, in an effort at decentralisation, (Germany, 2008, p. 158), they are implemented by the *Länder*. There, the State, through the Federation and the *Länder*, has “the responsibility for continuing education (...) through legal rules and the earmarking of appropriate financial resources” (Germany, 2008, p. 243). The decentralised nature of ALE public policy depends on strong educational management procedures, particularly in the case of private organisations and those public sector adult education ones that have to apply through a tender process (Germany, 2008, pp. 204–209). As responsibilities are transferred to levels closer to the people and entities that promote ALE locally, there are worries about the control and the quality of educational provision, because the number and variety of organisations involved in public provision should be taken into consideration. As is emphasised in this document, a

“(...) reporting system [was] set up for the long term and designed to produce information on all aspects of the education system every two years in future.” (Germany, 2008, p. 206).

While the *Länder* have important responsibilities for ALE public policy, many tasks are carried out by non-state entities. These entities differ in terms of size, internal structure, legal status, the goals that guide their actions, the activities and projects they implement and the participants involved. Now, these various education providers have been accompanied since the 1980s by the construction of an education market. As it is said in this report, “Commercial continuing education market has become increasingly established” (Germany, 2008, p. 176) as a result of a fall in public funding given that the last decade has seen “clear falls in the subsidies provided by the *Länder* for continuing education” (Germany, 2008, p. 167).

Consequently, the implementation of these public policies is accompanied by various evaluation and quality control mechanisms, including evaluation studies for different programmes and provision, impact surveys, work on the quality of ALE activities and programs as well as the certification system (Germany, 2008, pp. 205–206). These works are used by entities that promote ALE so that they can improve the efficiency and effectiveness of their education proposals in line with the public policy models of modernisation and social control and human resource management.

The Portuguese report also highlights the role of the state in implementing the ALE policy through the intervention of central government entities, such as the ministries of education, labour and solidarity, and the National Agency for Qualification (ANQ), which, as it says, coordinates and controls the activity of 457 local centres. Regarding these centres, the report notes the rapid expansion of these centres since 2000, when six were set up, further emphasising the urgent

need of results. These centres should concentrate on participants who are “poorly qualified” and already working, fostering their employability so that they can overcome “their precarious situation due to their low level qualifications” (Portugal, 2008, p. 10). It also indicates that these centres can be accommodated in very diverse entities, from general education school organisations, vocational training centres, non-profit organisations and civil society, business, professional, labour and sectoral agencies, etc. (Portugal, 2008, p. 11).

If the purposes assigned to centres that differ so widely are legitimate, given the characterisation of the education circumstances of the Portuguese population described in the report, the goals that the New Opportunities Initiative intended to be achieved by 2010, the year that the programme should be ended, seem ambitious. This programme was intended “to qualify 1,000,000 active workers by 2010” (Portugal, 2008, p. 3), which corresponds to about 10 per cent of its population. In greater detail, the Portuguese report aims at the certification and qualification 350,000 individuals at the compulsory education levels of 9 and 12 years, attendance of adult education and training courses, and 650,000 individuals certified and qualified through the recognition of prior learning (Portugal, 2008, pp. 10–11).

To achieve these results, taking into account the involvement of so many different bodies, a system to control and monitor the public provision was set up, called the “Integrated System for Management of the double certification training provision” that should contribute to the “efficacy, efficiency and quality assurance” of the ALE system built within the New Opportunities Initiative (Portugal, 2008, p. 11). This system is given some attention in the report, together with other mechanisms such as the New Opportunities Centres Quality Charter that “aims to improve and promote quality assurance” in the recognition of prior learning processes. The monitoring meetings held with all of those involved in the public provision (Portugal, 2008, p. 23), and also the external evaluation of the New Opportunities Initiative developed by the Portuguese Catholic University were also referred. Regarding this assessment, it states that,

“The aims of the evaluation study [the external evaluation study of the New Opportunities Initiative] are to assess the political measure, its intervention structure and the procedures implemented, as well as the quality of the outputs and the satisfaction level of the adults involved. These studies aim also to produce or improve tools to assess permanently the system procedures out outputs” (Portugal, 2008, p. 23).

Thus, the control and evaluation mechanisms mentioned in both the German and Portuguese reports suggest the possibility of entities competing for funds, which implies the adoption of principles of modernisation and social control model, but, above all, of human resources management model. The situation is quite different

in the Swedish report. This document highlights state intervention and, above all, intervention by the municipalities under the provision of formal education. Thus,

“The division of responsibilities is based on the main principle that the Riksdag and the Government should control educational activities by defining national goals, while central authorities, municipalities and the organisers of the different institutions are responsible for ensuring that educational activities are implemented in line with the legislative framework and that the national goals for the education are achieved.” (Sweden, 2008, p. 8).

It goes on,

“Instruments used to promote adult education include: Setting up overall goals for publicly funded adult education, Regulating the rights of adults to education and the obligation of educational providers, Wide-ranging financial support to municipalities, folk high schools and adult study associations and educational organisers, A generous system for study support to adults” (Sweden, 2008, p. 4).

These policy guidelines encourage the achievement of establishing the right to education, i.e. formal education, which encompasses the provision of basic adult education, upper secondary adult education and supplementary education, education for adults with learning disabilities and tuition for immigrants. This commitment chimes with the principles of the modernisation and social control model. In addition, the scope of action of the municipalities covers: the obligation to offer a range of provision, in the form of courses and it should eventually be possible to call on non-municipal entities to do this, if municipalities lack the conditions; facilitating access and thus stimulating the participation of all, regardless of gender, age, and level of education; the development of courses that match the demand for education and the needs of individuals, such as immigrants aged over 16, for whom municipalities must offer Swedish courses within three months of the need of these individuals to attend such courses being known, so that they can learn the language and culture and become socially and professionally integrated as quickly as possible (Sweden, 2008, pp. 9–11).

In order to further involve the municipalities in educational provision, the same report also indicates that,

“A major part of liberal education is closely connected with popular movements and other organisations that are either members of study associations or connected with folk high schools. Unlike other educational institutions, folk high schools and study associations are not required to follow centrally established curricula.” (Sweden, 2008, p. 11).

We can see, therefore, that apart from state action through the municipalities Swedish public policy tasks civil society with carrying out non-formal education activities. The priorities of these entities are in line with the values and principles

established by ALE policy and must strive to “bridge educational gaps” by targeting people “who are disadvantaged educationally, socially and culturally” such as those of foreign descent, the physically or mentally disabled and the unemployed (Sweden, 2008, p. 11). Furthermore, these priorities allow the individuals who attend these activities to take part in setting objectives and content, thus meeting their expectations and needs. For these reasons, as stated in the Swedish report, the actions implemented by the folk high schools and study associations include a significant range of activities (music, theatre, health promotion, etc.), with about 300,000 courses being held per year, involving a very large number of adults (about 1.5 million).

Given the range of entities involved in ALE provision, the emphasis placed by the Swedish report on the systems for monitoring and evaluating the public provision relate the increased autonomy granted to local entities with increased responsibility and accountability. The public provision is monitored and evaluated via: i) inspections carried out by state agencies; ii) national and international evaluations that result in the presentation of public reports on a regular basis (Sweden, 2008, p. 21). In this regard there is a focus on monitoring and evaluation carried out by the state through various strategies, noticing the relationship between the results obtained in these studies and state funding to be granted to public provision. These quality control mechanisms endeavour to increase the responsibility of the local actors (notably promoters and adult educators), in line with the model of modernisation and social control, and they can also support an emerging competitive system of entities promoting ALE, depending on the human resources management model.

Conceptual elements

The programmes and activities described in the German report are as diverse as the entities that are involved in ALE. This document indicates general education, cultural and civic initiatives. These actions include second chance formal education, language learning, courses related to information and communication technology, education initiatives for citizenship, and other cultural, health promotion and environmental protection education actions. Other general, civic and cultural education activities can be found in adult education centres. These may include content such as information and communication technology, language learning and also broach related topics such as health (Germany, 2008, pp. 181–185).

This variety could suggest principles of the democratic and emancipatory public policy model. However, the importance given to vocational training actions should be noted: initial; continuous, which is the most significant in terms of the

number of programmes; retraining; further development. This is in keeping with the principles of the modernisation and social control model, and with human resources management, too, because companies are the entities with the most ALE provision and highest volume of participation involved (Germany, 2008, pp. 180–181). In the same vein, this report states that the promotion of education and lifelong learning with objective to equip

“People with the tools they need for mastering the challenges and using the opportunities of globalization (...) Lifelong learning must become a matter of course in our rapidly changing society. No one should be left behind in the process of modernisation because of inadequate opportunities for education and training. (...) We must continue our efforts (...) to gear adult education programmes to the interests of people and the demands of a changing economy” (Germany, 2008, p. 5).

It is also indicated in this report that,

“(...) there is a need for greater responsibility and civic commitment on the part of the individual. This is an area in which continuing education can help to inform people, open up prospects for action and promote the development of positive values.” (Germany, 2008, p. 161).

We find an emphasis on economic development, while individuals are given responsibility for building their paths of education and training. This trend fits with the legislation recently adopted in this country in relation to ALE that seeks to coordinate with the EU guidelines, influenced by principles of human resources management (Field, 2006 and Milana & Holford, 2014, among others). This coordination between German ALE public policy and EU guidance has been helped by an extended national consultation on the Memorandum on Lifelong Learning, which took place in 2000/2001, the Fourth Recommendation on Continuing Education, 2001, the adoption of the Strategy for Lifelong Learning in the Federal Republic of Germany, 2004 (Germany, 2008, pp. 153–156). These documents show us the building of a “comprehensive system of lifelong learning” (Germany, 2008, p. 152), in an “information and knowledge society”, in “Europe as the world’s most competitive economy”. This is the route by which, in addition to programmes that favour sectors such as vocational training and basic education, in harmony with strategies linked to EU purposes, others are linked to reinforcing “the concept of individual responsibility and self-direction on the part of the learner” and “to improve the ease of movement around the education system and to improve the link-up between all areas of education (through, for example, modular courses and the recognition of skills” (Germany, 2008, p. 152).

The connection of public policy on ALE to EU guidance is even more evident in the Portuguese report. Although both the German and Swedish reports contain

references to learning throughout life, to build a society and an economy based on knowledge, as well as more consistent keywords with discourses that propagate the EU guidance, it is in the Portuguese report that the presence of such ideas is most evident. This is particularly noticeable in the narrow understanding of ALE, limited to education (formal) and training (through obtaining vocational qualifications) that lead to the development of economically useful knowledge and skills. As stated in that report,

“Over the last decades, Portugal has made a significant effort to qualify the general population, and the adults in particular, so as to make up the lag separating us from the other developed countries. (...) Being insufficient and slow the recovery, the actual Government decided to do more, better and deeper to overcome the low levels of education and qualification of the Portuguese population and stated in 2005 the New Opportunities Initiative as a national strategy within the scope of the National Employment Plan and the Technological Plan” (Portugal, 2008, p. 2).

Two public provisions are so named in this report, i.e. the recognition of prior learning and adult education and training courses. These two provisions cover basic education equivalent to 9 and 12 years of compulsory schooling, and vocational training that leads to professional qualification (Portugal, 2008, pp. 10–11). Informal education is also rated highly, through the recognition of prior learning, which is expected to yield the largest number of certifications by 2010.

This focus can also be noticed in the funding of ALE under the New Opportunities Initiative. In this context, support for the development of public provision had two sources, namely, the EU, through the European Social Fund, 75per cent of the total funds, and 25per cent from Portugal, provided through the national budget. The data show a progressive increase in funding of this sector since the beginning of the 2000s (Portugal, 2008, p. 14).

The German and Swedish reports both indicate a significant number of ALE activities, but there is a particular emphasis on liberal adult education. In this case, the Swedish report says that this type of ALE is carried out by the folk high schools and study associations, with a view to the participation of “all groups in society” covering “a broad range of subjects at various levels” (Sweden, 2008, p. 6). These actions have no pre-defined curriculum, given that they aim to meet the demand for liberal education, not an educational and pedagogical structure or established recipients, and can therefore be attended by all those who wish to make. In this regard, it states that,

“The freedom to determine own activities and educational profile affords each folk high school and study association considerable scope to design and tailor its courses to suit a range of target groups.” (Sweden, 2008, p. 11).

In addition, it highlights the concern to tailor the provision to the needs and interests of the participants, encouraging them to participate, particularly through financial support. This is why they are supported by state funds offers where,

“People are given the opportunity to influence their situation in life and take part in social development. Democracy is to be strengthened and developed. Interest in culture is to be broadened and participation and individual’s own creativity is to be furthered” (Sweden, 2008, p. 11),

in line with the principles of the democratic and emancipatory model.

Towards a comprehensive interpretation

As noted in the above discussion, the studied reports described programmes and actions that contained elements of the three public policy models, albeit with varying degrees of focus on the characteristics of each model.

All the reports are committed to the development of basic education policies, including initiatives for second chance adult education, basic education and learning German and Swedish language and culture in an effort to ensure all the individuals from these countries or living in them, as in the case of immigrants, have the knowledge and basic skills for social, civic, cultural, political and economic intervention. Although included in different formal education programmes, in the cases of Germany and Sweden, or recognition of prior learning, in the case of Portugal, the country reports analysed for this article provided data that make it possible to fit these provisions into modernisation and social control policies.

In addition, it was also possible to ascertain the (increasingly strong) presence of a market, largely through developing programmes aimed at modernising the economy, in which significant emphasis is ascribed to the provision designed, achieved and evaluated by vocational training departments of companies, sectoral entities, for-profit organisations that invigorate training and retraining activities. These actions are mentioned in all the reports, revealing characteristics of the human resources management policy model and differing in relation to the public policy purposes and goals. In Germany, these activities were linked to the effort to qualify labour to work in certain economic sectors that offered the greatest potential for economic growth and increased productivity, while Portugal’s commitment to these principles stemmed from the need to converge the national economy as part of a major restructuring, from its opening up since the 1980s and from the relatively low rates of education of its population. Although both countries were concerned with economic development, in fact these concerns were expressed in different purposes and in distinct programmes, as we have seen. In the case of Sweden, the characteristic elements of the human resources management model

were less evident, although some recent programmes relating to lifelong learning and keeping the Swedish economy one of the most competitive in the world, and concern for the validation of knowledge acquired throughout life were situated in this area.

But it was clear that more of the initiatives in Sweden required the involvement of civil society, including actions to promote democracy, equal opportunities, social justice and civic participation, than are mentioned in the German and Portuguese reports. Thus, except for the Swedish report, the characteristics of the democratic and emancipatory public policy model were those hardest to find in the texts in question contrary to the strong tradition of adult education, of challenge, resistance, social change and emancipation. This absence was particularly evident in the Portuguese report, due to the features of the programme implemented after 2005, the New Opportunities Initiative.

The inclusion of elements of various public policy models in the public policies of these countries was also evident, indicating intersections and hybridism. In this context, there was clear interaction between elements of the modernisation and social control policy model and the human resources management model in the organisational and administrative dimensions, as well as the policy and administrative guidance in all the countries studied, most clearly in Portugal and Germany. This interaction occurs in the context of societies in which we see strong changes in the economy, more and more computerised and marked by new forms of capitalist accumulation, in which workers need new knowledge and skills. Where we see interaction between elements of the modernisation and social control and democratic emancipatory models, this link was most visible in the policy priorities established in the Swedish report and less so in the German one. It seems that the belief that promoting this area can contribute to the consolidation of democracy, social justice, equal opportunities and solidarity still prevails at the level of the values defined for public policy on adult education. It is also in the conceptual elements, especially regarding the defence of the variety of adult education practices, the entities promoting educational provisions and the (individual and institutional) actors involved in this area, that there has been an intersection of elements more characteristic of the modernisation and social control and democratic emancipation models, particularly in the Swedish report. This variety to meet the needs, interests and motivations of adults and tried to sustain adult participation in programmes promoted in public policies.

It was more difficult, however, to find connections between all the models indicated in this article, i.e. modernisation and social control, management of human resources and democratic and emancipatory, in the areas chosen for this analysis.

This situation is indicative of the dwindling importance that policies relating to redistribution, social justice and even the consolidation of democracy have in European countries, particularly those that were studied through these reports. The exception to this is Sweden which, albeit with less force, still maintains policies related to democratic education and to personal and social development in a society whose benchmark values are the consolidation of democracy and the promotion of social justice. This country's report contains many instances of an effort to coordinate very different elements, characteristics of the three analytical models, thus reflecting the importance that the history of adult education still has in the educational provision available to adults.

Supra-national influence, national features and governmental priorities

The analysis of the selected documents revealed different policies, in which the dissimilarities were related to the search to respond to problems and contextual and/or cyclical needs. Here, adult education policies in the countries studied are still marked by difference, which derives mainly from state intervention, the market and civil society of a national nature. However, the similarities between the policies of the countries concerned were particularly evident. In this context, we draw attention to frequent references to the mega level, especially mentions of the EU and programmes such as the European Social Fund, intended mainly for the development of vocational training and qualification of labour. Apparently missing is UNESCO, which has played an important role in consolidating adult education as a field of reflection and even promotion of intervention programmes. Thus, references to the EU arise from the various actions that the countries under consideration implemented with European funding under the guidance of this supranational actor. In fact, the macro level, national in nature, still retains a strong presence in the reports. Even assuming that transnational influences affected, for example, leading economic enterprises such as the automotive sector, where innovation in vocational training served as a model for many other sectors of the economy, or, as happened with the international intervention of a development agency, government or non-government of Sweden and Germany in the 1960s and 1970s, the programmes implemented were notable for their national elements, and therefore differed from country to country in terms of cyclical and contextual elements. But, when producing policy guidelines and submitting funding programs to promote lifelong learning, the EU designed an effective political strategy of convergence of national practices in adult education, very targeted, however, at the economic development of certain sectors considered innovative and pivotal

to building a highly competitive economic zone in the global market. In this context, in which the characteristics of the human resources management model are particularly evident, state intervention at the macro level seems increasingly limited to basic education actions and the design and monitoring of regulatory and control mechanisms. Here, the state seems to take on more management functions, thereby relinquishing the political functions that particularly characterised the “30 glorious years” in the framework of the social contract and the enshrinement of training and education as basic social rights of workers and citizens. In this regard, while the three reports still feature the strong presence of the state, this relates more to the monitoring and evaluation of the provisions offered by this sector than to the public provision. While this circumstance is related to the fact that these are official documents, it is also true that the intervention of this actor seems to be in clear decline, particularly with respect to the state institutional provisions geared to adults. And here there appears a contradiction between the established government priorities, which still feature democratic and emancipatory elements, and the programmes and activities implemented that highlight the connection between the modernisation and social control and human resources management models that only studies at the meso and micro levels can clarify. But, as already mentioned, that task is beyond the scope of this article.

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Knowledge economy and demographic change: Comparative case study of Europe and South Asia

Abstract

Lifelong learning has the dual function of responding to societal challenges and economic growth. Two decades after the theorization of lifelong learning, Europe shows an economic and political integration worse than the expectations, partly due to the economic crisis. As a consequence, it is far from the strategic goal set by the Lisbon Strategy to become 'the world's most competitive and dynamic knowledge-based economy' (European Council, 2000). The theme of lifelong learning has grown in importance across the globe. Nonetheless, its discourse and implementation have changed across countries according to the peculiarities of global regions (population, policies, role of the state).

This has led to an uneven distribution of and participation in learning opportunities across the world, with deep effects on social cohesion (European Commission, 2013). What are the differences and similarities in the various regions of the world? Are they connected to different approaches to lifelong learning? Is it possible to identify a common global strategy?

The paper draws some conclusions about the approach to lifelong learning of policy makers from some countries of South Asia (Nepal and India) and Europe (Germany and Greece). The situation as described offers some grounds for optimism but also for concerns. Lifelong learning is a priority issue in many countries, especially after the development of the knowledge economy, but the efforts have produced different results: too narrow and small in some regions to address the Lisbon Strategy challenges, often resulting from historical, socio-economic, and demographic differences that characterise those regions.

Continued attention to the peculiarities and major problems of these countries is needed to assess the characteristics that a positive approach to lifelong learning should have. A globally homogeneous strategy to lifelong learning could interfere with the natural progress of the national conceptual frames, but common strategic principles are desirable.

Introduction

Today, the main driving force of the economy is *knowledge*. The global knowledge economy is transforming labour demand throughout the world. Preparing workers

to compete in the knowledge economy requires an equally demanding framework of education and training that encompasses learning throughout the life cycle, from early childhood to retirement. The concept of knowledge is changing from the mere acquisition of theoretical knowledge (*old knowledge*) towards the application of such knowledge (*new knowledge*) to larger developmental processes. Human capital is gaining importance, and workers are becoming increasingly responsible for every aspect of their work and professional life (Deloitte, 2015).

The idea and practice of the knowledge economy has a myriad of orientations and meanings, and it influences many aspects of life, from the economy to personal development. On one side, knowledge is one of the factors of production and growth: sharing, producing, and using knowledge influences policy discourses when it comes to the economic competitiveness of countries. On the other side, knowledge influences individual development, learning, biographies, abilities/possibilities of participation in social life, as well as social status and reputation (cf. Mandl & Krause, 2001, p. 3). As Torres noted, lifelong learning has been adopted in the global North as a strategy for 'promoting active citizenship and the necessary knowledge, skills, values, attitudes toward employment and work, but for the global South it is basic education/literacy that matters most' (Torres, 2002, p. 4). The notion of a knowledge economy, which appears as an inherent characteristic of the dominant perspective of lifelong learning, was constructed in the Organisation of Economic Cooperation and Development (OECD) as well as in European Union (EU) contexts based on the assumption that the production of human resources equipped with most up-to-date knowledge and skills is a key point to achieve national competitiveness (cf. Rubenson, 2011).

Here, we define the knowledge economy as: 'production and services based on knowledge-intensive activities that contribute to an accelerated pace of technical and scientific advance' (Powell & Snellman, 2004, p. 199). The knowledge economy is a global phenomenon; however, the countries' responses to such a phenomenon have certain similarities and differences. This paper aims to identify the main categories and policy approaches across selected countries from South Asia and Europe as single case studies and analyse the divergences and convergences towards lifelong learning and the knowledge economy.

Comparative Perspectives: Representations from South Asia and Europe

The analysis proposed here is comparative. The global phenomenon of the knowledge economy provides a pervasive element for cross-country comparative analysis. Demography, information and communication technology (ICT),

socio-economic conditions, political stability, policy discourses, international and transnational actors are important enablers and disablers of the global knowledge economy. Among these, demography and policy discourses are the most significant categories when analysing the role and relevance of the knowledge economy in the global context. The demographic situation of a country or region determines its overall merits and demerits when adapting to the global knowledge-economy competition. It is in response to such challenges and opportunities, respectively, that policy discourses constitute a most significant category to analyse the dimension of the knowledge economy. Hence, demography and key policy discourses are compared across Germany, Greece, India, and Nepal. The concept, context, and category of the knowledge economy in Europe and in South Asian countries, as well as the (changing) demographics across these countries, are the key points of discussion for the comparative analysis.

Transitions in demography

The global North is characterised by industrialised and hence economically robust countries (North America and Europe: high income, OECD member countries). The global South (South Asia: low and middle income, non-OECD member countries) is more dependent and hence less industrialised and economically weaker. At the turn of the twenty-first century, it is important to note that the aging—and shrinking—population in the global North is a critical issue in the context of knowledge workers and the knowledge economy. The declining young population in Europe (Eurostat, 2015, p. 18) and the growing young population in South Asia (WEF, 2014) have resulted in a new sense of dependency across the globe. For instance, in Europe in the last few decades, there is increasing dependency on the non-native population as labour force (European Commission, 2010). In the South Asian region, there is increasing dependency on the labour market to create and provide employment to the growing young unemployed population (WEF, 2014).

Below, we discuss the demographic transition in two countries in Europe (Greece and Germany, higher income, OECD member countries) and South Asia (Nepal and India, low and middle income, non-OECD member countries), representing the two worlds of developed and developing and discussing the influence of demographics on the policy and practice of the knowledge economy.

Demographic depression in Europe

As witnessed in the last couple of decades, Europe is exposed to a series of challenges: aging societies and increasing migration on the one hand, and economic slow-down in many countries on the other. The demand for and dependency on a

knowledge-intensive economy has brought such challenges to a critical point attracting national, regional, and international attention to address these challenges. One of the potential means to address the above-mentioned challenges is to focus on providing new strategies for effective education and training mechanisms (EU, 2009).

Indeed, in today's knowledge-driven economy, education and training are considered major factors affecting a society's level of economic attainment and growth. Lack of knowledge and skills, in particular, is among the prime factors likely to delay a country's progress towards the information society. Experience, however, has shown that an educated labour force does not automatically translate into dynamic economic development and technological innovation. Especially in the Greek context, the human resource potential is not only the outcome of the education system but the result of a complex process that involves non-formal and informal learning, networks, workplace, family background, geographical area, and so on (European Commission, 2013). Lifelong learning is considered a policy priority at the European and international level due to its capacity to enable people to face the challenges posed today by an ageing population, a skills and competences mismatch, and global competition—challenges further enhanced by the ongoing financial crisis.

The demographic profile of Greece is similar to that of other developed countries. Fertility rates per 1,000 inhabitants have been continuously falling in Greece: 18.9 per cent in 1960, 16.5 per cent in 1970, 15.4 per cent in 1980, 10.7 per cent in 1988, and 9.5 per cent in 1998 (Statistical Year Book of Greece, 2015). According to the United Nations' population projection and the World Fact book, Greece has one of the lowest fertility rates in Europe (1990–1995) and the lowest total fertility rate of all other countries in the Balkans (United Nations, 2015). In 2015, the population of Greece dropped by 500,000 to about 10.2 million. The drop in fertility rates, combined with the aging population, poses a serious problem for the country: the increase of the ratio of retired people to those who are economically active.

Moreover, the situation is worsening day by day: since the beginning of the crisis, the percentage of the population aged 24–65 participating in lifelong learning in Greece (3 per cent) appears to be well below the European average (9.1 per cent) and the Europe 2020 target (15 per cent). Accordingly, the percentage of low achievers in basic skills in Greece is 27.7 per cent, while the European average lies at 20 per cent, and the target for 2020 is less than 15 per cent (Konstandaras, 2015).

The German situation is very similar to the Greek one: Germany has been characterised by low birth rates (fertility rate at 1.38 children per woman) and a

rising life expectancy (about 80 years) over the last thirty years. Thus, Germany has one of the most rapidly ageing populations in the world (cf. BMBF, 2008, p. 14). This aspect is crucial when talking about the future number of skilled workers. The older generation far outnumbers the young, upcoming labour force, which is relatively small to keep the actual gross on the same level. Indeed the population of 15–64-year-olds, who constitute the *knowledge workers*, is declining (cf. Weltbank, 2015): in 2003, Germany had 67.3 per cent of the population in the age group of 15–64; that share declined to 65.8 per cent in 2010 and to 65.7 per cent in 2013. Greece faces a similar demographic scenario.

The immigration phenomenon diversifies in Greece and Germany. The immigration rate in Germany has steadily increased in the last years due to the strong German economy. But it can be expected that it will increase also due to the international refugee situation. Indeed, in 2013 about 1.2 million people moved to Germany while about 800,000 left the country. Thus, despite the low birth rate, the population is growing. Depending on statistical data and the definition of the term *migrant* the percentage of migrants in Germany varies from 8 to 18 per cent (cf. Statistisches Bundesamt, 2014; Weltbank, 2015). In this context, lifelong learning is expected to develop its potential to support migrants as well as the native-born to participate in the knowledge economy. In general, the level of qualification of the German population has risen over the past few decades. According to the level of education, the differences between those with and without a migration background are still significant. About 10 per cent have no qualification level at all (persons without a migration background: 1.5 per cent) and about 51 per cent have no professional qualification (person without a migration background: 27 per cent) (cf. BMBF, 2008, p. 142¹).

Demographic bulge in South Asia

The South of the world is characterised by a young and fast-growing population and economy, on the one hand, and very serious issues linked to casteism, diffused poverty, illiteracy and innumeracy of the population, on the other hand.

Nepal is one of the impoverished nations of the global South, squeezed between two emerging economies: India and China. Nepal is identified as one of the 49 least developed countries by the United Nations in terms of its economic vulnerability, poverty, and illiteracy (cf. United Nations, 2008). Nepal's economy largely

1 In this BMBF report, the population with a migration background is understood to include those persons who came to Germany from 1950 onwards and their descendants (BMBF, 2008, p. 141).

depends on financial assistance from bilateral and multilateral agencies. With a per capita income of about US\$ 350 and more than half of its 27.8 million people living on less than US\$ 2 per day, Nepal faces several challenges. Nepal has seen in the last decade a gradual increase in the population age group of 15–64 (cf. World Bank, 2015). In 2000, that group accounted for 55.8 per cent, followed by 58.6 per cent and 60.2 per cent in 2011 and 2013, respectively (ibid.). Between 2000 and 2013, the population in the age group of 15–64 increased by 4.4 per cent (ibid.), which could be a potential source fulfilling the demand for knowledge workers at both the national and international level.

India has been one of the fast-growing economies in the last decade; indeed, it is the fourth-largest economy, inhabited by about 1.252 billion people. According to Kaushik Basu, the average age of Indians will be 29 years by 2020, which would push the dependency ratio to just about 0.4 per cent. According to the current skill and employability trends that pop up on the basis of data available in 2013, 0.8 billion out of the 1.3 billion people inhabiting India were of employable age, that is, part of the economically productive population. In alignment with such a surge in the skilled population, the country has been witnessing an increase in the population of 15-to-64-year-olds in the last decade in particular. In 2000, the population of 15-to-64-year-olds was 61.4 per cent; in 2010, it was 64.7 per cent, and in 2013, it was 65.6 per cent. The economically active population in the country increased by 4.2 per cent over the last 13 years (cf. Basu, 2007).

The demographic transitions discussed above in the context of Nepal and India are of critical importance for the global knowledge economy. It is the size and age of the population that is prepared to respond to the growing demands of the economy that matters most for a country's economic competitiveness—the core agenda of the global knowledge economy. In order to effectively ensure the active participation of the population aged between 15 and 64 years, appropriate policy interventions are needed. The section below discusses the key transitions in the policy interventions across Germany, Greece, Nepal, and India by analysing the main discourse(s) therein.

Transitions in policy discourses

Public policies for education, training, and innovation have always been aimed primarily at creating and diffusing knowledge in order to guarantee economic progress. Nonetheless, lifelong learning and adult and continuing education policies underwent major transitions in the last couple of decades: a shift from a *humanistic* to an *economistic* policy discourse occurred (cf. Bron & Schemmann, 2003, p. 7). Similarly, the OECD suggested that 'the role of knowledge (as compared with

natural resources, physical capital, and low-skill labour) has taken on greater importance. Although the pace may differ, all OECD economies are moving towards a knowledge-based economy.' (OECD, 1997, p. 7) Therefore, policies and strategies among the developing countries have witnessed similar transitions (cf. World Bank, 2003, pp. 109–110).

Germany and Greece: Lifelong learning and education/training

When UNESCO and the OECD created the concept of lifelong learning in the 1960s and 1970s, the organisations were deeply influenced by the political European context. Indeed, Faure et al., in their 1972 report, stated that 'the idea of lifelong education is the keystone of the learning society' (Faure et al., 1972, p. 181) and 'the normal culmination of the educational process is adult education' (ibid., p. 205).

The EU referred to the concept of lifelong learning for the first time in the white papers on 'Growth, Competitiveness, Employment' (Commission of the European Communities, 1993). The breakthrough was achieved with the *European year of lifelong learning* in 1996 and the *Memorandum of lifelong learning* in 2000, which brought on a very important modification in the educational field. Considering this, European stakeholders, scholars, and experts in the field of education should have noticed the event right from its beginning, but they did only after a while (cf. Holford & Mleczko, 2013).

The idea of lifelong learning has been implemented in different ways by the various member states, and its significance has varied at times by economic sector across Europe and European regions. Thus we find that in 2007, the European Commission started acting to make lifelong learning a reality through two 'core indicators': the participation of adults in lifelong learning and adult skills (cf. Commission of the European Communities, 2007). Lifelong learning, for this purpose, became a vital component of the European Commission's adult learning policies (European Commission, 2011). With the beginning of the twenty-first century, lifelong learning programmes become an important EU-wide regulating and policy tool.

Due to the growing importance of lifelong learning and adult education in recent decades, it is difficult to discuss and compare issues of lifelong learning policy without reference to Europe and European Union policies.

For example, in the 1960s and 1970s, the qualification level of the population in former West Germany became a big issue, especially in connection with the Sputnik crisis. This significant event fuelled the understanding that vocational training alone is not enough to proceed and handle social and technological challenges.

In this period, knowledge, ideas, and information became the central factors to face these challenges and to secure economic growth and prosperity (cf. Giddens, 2001, cited in Bron & Schemmann, 2003, p. 8). Summarising this debate, an expert commission on education developed a structural national education plan (*Strukturplan des Deutschen Bildungsrates*, 1970) defining continuing education as a ‘necessary and lifelong complement to initial education ... as the continuation or recommencement of organised learning following completion of a training phase of whatsoever length’ (BMBF, 2008, p. 146).

So it may surprise that ‘the academic discipline of adult education has not yet profoundly engaged in the discourse on a knowledge society’ (Nolda, 2001, p. 103, translated by A.B./M.S.). The reservation towards the term *knowledge society* comes from its inflationary use in other sciences like technology, informatics, or management, which use another understanding of ‘knowledge’ (Nolda, 2001, pp. 99–100). In current political and public discussions, education is given a new dimension, which is changing knowledge and education—given that it is enabling knowledge—to a crucial resource for adding value, a site-related factor, a factor for production, and so forth (cf. Nolda, 2001, pp. 99–100). Moreover, education and *Bildung* itself are becoming part of a global market, exchanges, and competition. Consequently, the goal of employability, set by educational policy, is part of the service sector, making *Bildung* a good to be produced, distributed, and promoted (cf. Haslinger & Scherrer, 2006). Terms that once were used to describe and predict the social and economic development of countries are now legitimate for (educational or research) policy (cf. Nolda, 2001, p. 100), *Bildung* plays a crucial role in solving structural economic problems (e.g. Willke, 1998). For these reasons, no fundamental discussion of the concept of the knowledge economy or society exists in German adult education, as Nolda (cf. Nolda, 2001, pp. 104–05) points out. She observes three patterns of using the term ‘knowledge society’ in adult education:

- use of synonyms like ‘information society’ or ‘modernity’
- critical usage of the term, underlining the necessity to replace ‘knowledge’ by ‘education’ or ‘learning’ and to add informally gained knowledge
- adoption of the term and agreement with the argument claiming an increase in knowledge and accessibility through ICT (cf. Nolda, 2001, pp. 104–05).

In Greece, law no. 3879/2010 on lifelong learning, enacted by the Greek parliament in September 2010, sets the basis for the planning and implementation of a national holistic strategy on lifelong learning and for the creation of the National Network of Lifelong Learning (NNLL), which encompasses all lifelong learning governing bodies and lifelong learning service providers operating under the auspices of different ministries. The prerequisites for fruitful interaction within

that network include the mapping and registration of members, their consistent briefing on national lifelong learning policies and the priorities linked to quality assurance, validation and accreditation, interoperability and mobility, enhancement of attractiveness, participation and accessibility.

In this framework, education and training are essential to achieve the objectives of the strategy *Europe 2020*. To this end, effective investments in high-quality, modern education and training are very urgent since they will lay the foundation for long-term prosperity in Europe and facilitate short-term responses to address the impact of the crisis. In accordance with EU policies, lifelong learning policies in Greece emphatically stressed the issue of employability, especially with regards to socially vulnerable groups (mostly the unemployed), but with limited efficiency both in terms of participant characteristics (those who participated were the most educated ones) and in terms of the link between the system of continuing vocational training and employment. Furthermore, lifelong learning policies in Greece emphatically stressed the aim of inclusion with reference solely to employment. This led to the weakening of general adult education (e.g. the educational programme of the General Secretariat for lifelong learning), which by definition promotes active citizenship and personal development. Jarvis has argued that in globalisation times, continuing vocational training dominated worldwide because it was more responsive to the needs of the market, in parallel to the withdrawal of the welfare state (cf. Jarvis, 2007, pp. 29–36). The emphasis in lifelong learning in the form of continuing vocational training also meant that adult and continuing education was to become a commodity with not much reflective thinking. The need for radical adult education is thus becoming urgent, especially after the Greek economic crisis.

To be more specific, since 2010 Greece has been insolvent and has virtually defaulted under a massive public debt, with the European Union, the International Monetary Fund, and the European Central Bank providing lifeline loans to Greece. As a consequence, the ‘traditional’ business model of the country failed, and the government felt the urgency to find new paths to guarantee a future to Greece as a dynamic, high-tech, export-oriented economy. With this aim in mind, the key values associated with the social purpose of adult education—social justice, greater social and economic equality, the promotion of a critical democracy, a vision of a better and fairer world where education has a key role to play through the development of reflective thinking (cf. Johnston, 2006, pp. 416ff.)—should be taken more into consideration.

It is time for Europe to actively implement the four aims of lifelong learning—employability, active citizenship, social inclusion, and personal development—

following Jarvis's argumentation (cf. Jarvis, 2004, pp. 9ff.). In particular, inclusion in the employment system with the help of lifelong learning can contribute to the development of human potential and creativity. However, it remains uncertain whether this aim can be satisfied in the case of Greece, for reasons that do not necessarily pertain to the system of continuing vocational training *per se* but rather to the pace of job creation in the economy. Undoubtedly, it is a fundamental precondition for lifelong education to substantially serve the socially excluded so that they are included in the socio-economic system through their employment. Nevertheless, it remains a challenge for lifelong education to contribute to the full development of human beings through their education in various fields of study, and to the formation of a democratic society with educated citizens, active members of local societies and with possibilities of intervention in the processes of government.

Nepal and India: Lifelong learning and basic literacy

From the perspective of developing and less developed societies, the discourse on lifelong learning in the context of the global knowledge economy is different compared to that in developed or high-income countries, as discussed above. Most of the countries in South Asia do not have a well-defined policy on lifelong learning. Confronted with the massive problems of illiteracy and poverty, most of them tend to confine themselves to literacy programmes (cf. Shah, 2010).

In Nepal, the provision of higher education and vocational training—often associated with the discourse of the knowledge economy—has never been Nepal's priority, because major donors such as the World Bank are reluctant to invest in vocational and higher education until 'primary education is well covered' (Torres, 2002, p. 5). Hence, basic literacy and primary education matter more for Nepal than the new rhetoric of lifelong learning and the knowledge-based economy.

However, after the 1990s, the term *lifelong learning* and the associated discourse were embedded in some policy documents such as the '10-Year Literacy/Non-Formal Education (NFE) Policy Programme Framework' implemented in 2006 under the leadership of the UNESCO Office in Kathmandu (cf. UNESCO, 2006). The vision of the framework was 'to create a fully literate learning society whose citizens possess the skills and competences that enable them to contribute continuously towards harmonious national development by raising the quality of life of every citizen' (UNESCO, 2006, p. 17). Literacy is conceived in a wider sense, and programmes related to 'lifelong and continuous education, skill development and income generation' (Government of Nepal, 2007, p. 1) are envisaged, but NFE policy is not explicitly about what constitutes lifelong learning and its relevance

in the context of Nepal. Some major educational projects launched in Nepal after the 1990s—such as the Basic and Primary Education Project (1992–2003), the Secondary Education Support Project (1992–2000), the Community School Support Project (2003–2008), and the Education for All Programme (2004–2009)—all of them featuring an active involvement of international organisations such as the World Bank, focused mainly on primary and secondary education. The current educational programme, ‘School Sector Reform Programme’ (SSRP 2009–2016), mentions lifelong learning a number of times. In Chapter 4 of the core document (Government of Nepal, 2009) the term *lifelong learning* appears in association with literacy: ‘Literacy enables them to engage in lifelong learning and helps develop capabilities to sustain their livelihoods and participate fully in society’ (Government of Nepal, 2009, p. lviii). The programme aims at linking lifelong learning with income generation as well as occupational and vocational skills. It also aims at ‘developing partnerships for collaboration with UN agencies and I/NGOs to implement lifelong learning programmes in selected districts’ (Government of Nepal, 2014, p. 21).

Though the term *lifelong learning* appears in some of the major policy documents (Government of Nepal, 2009, 2014), it does not reflect the ways in which lifelong learning has been conceived as a new educational policy at the international level by the European Union (European Commission, 2000), the OECD (OECD, 1996), and UNESCO (Delors et al., 1996; Faure et al., 1972). Thus, as far as the case of Nepal is concerned, there is no explicit provision for lifelong learning, and there are no policy documents to reflect a nuanced understanding of lifelong learning that has been debated in international policy documents and some scholarly publications (Griffin, 2009; Rubenson, 2011). Rather, lifelong learning appears as a catchphrase that Nepalese policy makers are willing to embrace, but there is no clear understanding on what lifelong learning really is and whose interests it really serves.

According to Bhatta, there is a tendency for international agendas and targets to ‘become the de facto policies’ for Nepal (cf. Bhatta, 2011, p. 11). The MDGs and EFA goals are soon coming to an end, and the international community is embarking into a post-2015 era with a new set of goals and targets. One of the goals related to education is to ‘ensure equitable and inclusive quality education and lifelong learning for all by 2030’ (UNESCO, 2014, p. 3). But critical analysis of key documents suggests that an economic orientation of lifelong learning—one that sees the goal of education as producing flexible human capital in order to create competitive knowledge-based economies—is evident in the discourse informing post-2015 educational agendas (Regmi, 2015). A review of the current literature

shows that the economic orientation of lifelong learning has been criticised by many (e.g. Griffin, 2009; Rubenson, 2011; Torres, 2002), because it moves away from the humanistic approach to lifelong learning spearheaded basically by the UNESCO (Delors et al., 1996; Faure et al., 1972). A foreseeable danger looming large in Nepal in the post-2015 context is a potential misinterpretation of lifelong learning and subsequent policy development—on the basis of the economic orientation of lifelong learning—so as to produce human resources that do not fulfil the contextual needs of Nepal and its people but serve the interest of a global market controlled by multinational corporations (cf. Pingeot, 2014).

The knowledge-based economy has been a reality in the northern countries of the world for a long time, but the emerging economies, popularly known as BRICS (Brazil, Russia, India, China, and South Africa), are also very keen to establish knowledge-based economies fuelled by their huge talent pools, entrepreneurial capabilities, and improved infrastructure. Thus, a knowledge-based economy is not a distant dream for India, like it is for some other emerging economies.

The present system of education in India, which follows the National Policy on Education, (Government of India, 1986) considers lifelong education the 'cherished goal of the educational process which presupposes universal literacy, provision of opportunities for youth, housewives, agricultural and industrial workers and professionals to continue the education of their choice at a pace suited to them' (Government of India, 1986). The policy observed that the critical development issue was the continuous upgrading of skills so as to produce manpower resources of the kind and quantity required by society. It suggested that the future thrust would be in the direction of open and distance learning. The policy was translated into practice by means of large-scale literacy campaigns/projects and adult continuing education programmes, implemented by governmental and non-governmental organisations (cf. Government of India, 1992).

The organisation of two UNESCO-sponsored international conferences on lifelong learning held in Mumbai (1998) and Hyderabad (2002), and the promulgation of 'The Mumbai and Hyderabad Statements on Lifelong Learning', which highlighted lifelong learning as a 'guiding principle' and an 'overarching vision' did succeed in educating Indian policy planners and generated considerable interest among educationists (cf. Narang & Mauch, 1998). The Hyderabad statement on lifelong learning in fact clarified the role of lifelong learning in the creation of a learning society and learning community. It emphasised empowering people, expanding their capabilities and choices in life, and enabling individuals and societies to cope with the new challenges of the twenty-first century (cf. Singh, 2002).

Currently, lifelong learning is often used as an umbrella term to cover basic literacy, post-literacy, continuing education and extension programmes of different organisations, refresher/continuing courses of professional bodies, and private institutions and business houses. It is not conceived as an overarching framework of learning.

In the last decade, the government of India has initiated a series of policy interventions in response to the global knowledge-economy phenomenon. The National Skill Development Mission has recognised the importance of skills and knowledge as the driving forces of economic growth and social development for any country, emphasising the need for promoting lifelong learning and maintaining quality and relevance according to the changing requirements of the emerging knowledge economy (cf. *National Skill Development Initiative*, 2009). The National Literacy Mission continued to focus on literacy, mainly because of massive number of non-literates in the country. Imparting skill training and providing avenues for upskilling did not receive much attention in the National Literacy Mission. Since the 12th Five-Year Plan (2012–2017), the Sub Committee on Adult Education has pointed out the need for developing a comprehensive policy to guide the systematic promotion of adult and lifelong learning and the creation of structures and mechanisms for the recognition, validation, accreditation, and certification of prior learning (Government of India, 2011). It is expected that lifelong learning will soon become a reality and an important strand of India's education policy.

Conclusions

In this paper, we have documented the different approaches to lifelong learning and adult education that Europe and South Asia are experiencing as a result of the ongoing demographic, economic, and financial situation. Whereas birth rates have increased in almost all countries in South Asia, they have declined steadily in Europe. Particularly, there is evidence from the World Bank database (2015) that the active population (those aged 25–64) has been hit hardest and is still suffering from the loss of work and global competition. Countries that have suffered youth declines and financial slumps experienced a lifelong learning crisis due to the lack of links between active and passive labour market policies towards continuing education and employment.

The concern is that such spells of insufficient adult education and employment will have long-lasting effects, which would be harmful for the individuals and the countries themselves, potentially making individuals less sensitive to education in the long term. This reality is even worse when paying attention to the different lifelong learning policies.

Due to cultural and economic specificities, each country in the world is experiencing different conditions under which policies and devices for lifelong learning have been implemented. As a consequence, this has resulted in different impacts and paradoxes across member states, although a European space of lifelong learning and education does exist, assuming the creation of the basis of democracy, social justice, freedom, and employment at every level of European society.

As evidence demonstrates, the global South is characterised in the same way by a strong sensibility for lifelong learning, with a specific emphasis on literacy—‘the ability to understand, evaluate, use, and engage with written texts to participate in society, achieve one’s goals, and develop one’s knowledge and potential’ (OECD, 2012)—and numeracy—‘the ability to access, use, interpret, and communicate mathematical information and ideas in order to engage in and manage the mathematical demands of a range of situations in adult life’ (OECD, 2012)—rather than employability, adaptability, and skills for life. The latter are the main issues of European regions in recent years, as the EPAL network (European Platform for Adult Learning and Education) highlights.

This shows that creating a global strategic approach and a framework to lifelong learning towards the knowledge economy is a tough task that could be pursued by discussing, programming, and implementing a common approach to lifelong learning while contextualising the meaning and practice of each country and region. Nevertheless, a lack of coherence in the educational progress could undermine the goal. Only a focus on a global front towards literacy, numeracy, and cohesion will avoid the risk of a polarisation between North and South—the developed and the developing poles, between high-skilled and low-skilled workers, and such imbalance between global regions. In order to do this, governments should focus on the risk of relying on international perspectives in the field of lifelong learning when setting common, comprehensive, coherent strategic goals and evaluating a proper distribution of resources among individual countries. Lifelong learning should not be an autonomous act of institutions but a consequence of a public intervention that adopts rules that reduce economic and social barriers and allow everybody to access training and lifelong learning opportunities in the respect of learning needs and different cultures.

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