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The state and development of adult learning and education in Europe, North America and Israel

Regional synthesis report

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In 2007 all UNESCO Member States were asked to prepare national reports on the situation of adult learning and education and on salient developments since 1997, the date of CONFINTEA V, in preparation for the Sixth International Conference on Adult Education (CONFINTEA VI). A set of Guidelines for the Preparation of National Reports was produced, asking questions to assist in the compilation of the reports, which were completed and submitted to the UNESCO Institute for Lifelong Learning.

These national reports are accessible on the Institute website at:
http://www.unesco.org/uil/en/nesico/confintea/confinteacountries.htm

This report, compiled by Helen Keogh for the UNESCO Institute for Lifelong Learning, attempts to synthesise a fair summary of these Member State reports, supplemented where necessary by other sources, reports and research documentation.

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Introduction

Context and scope

This regional report covers developments in adult learning and education (ALE) in the UNESCO region of Europe, North America and Israel (Appendix 1), as reported by the Member States (Appendix 2). It contributes to the Global Report on Adult Learning and Education (GRALE) for CONFINTEA V1 2009 (Appendix 3 for expectations of Member States in relation to CONFINTEA V1).

The CONFINTEA V *Hamburg Declaration* defines adult learning and education as follows:

> Adult education denotes the entire body of ongoing learning processes, formal or otherwise, whereby people regarded as adults by the society to which they belong develop their abilities, enrich their knowledge, and improve their technical or professional qualifications or turn them in a new direction to meet their own needs and those of their society. Adult learning encompasses formal and continuing education, non-formal learning and the spectrum of informal, incidental learning available in a multicultural learning society, where theory- and practice-based approaches are recognised. (UNESCO Institute for Education 1997a)

ALE is characterised by its heterogeneity. It covers a wide range of adult learning and education with a diversity of overarching structures, priorities, aims, providers, learning content, organisational forms, duration and learning outcomes.

The national reports and, thus, this report, concentrate mainly on ALE as organised learning and teaching processes in formal and non-formal settings. While various categories of ALE are referred to throughout the report, in reality, adult learning experiences increasingly overlap and distinctions are becoming more blurred. Adults do not observe neat administrative or other distinctions when learning. Their goals do not necessarily coincide with the goals of a funder or provider and they frequently achieve unplanned or unanticipated outcomes and applications from learning. Moreover, a significant feature of the emerging knowledge society is the links between all aspects of learning done by individuals, enterprises, communities and regions.

While it is recognised that education and training systems within the region are rooted in very different traditions, the report uses broad brush strokes to describe systemic characteristics and trends in ALE along a number of dimensions, viz., ALE policy, governance and legislation; the financing of ALE; participation in ALE; the delivery framework for ALE; learning options; learning outcomes and recognition; quality, and research on ALE. This approach should not be taken as a failure to acknowledge the sometimes profound differences within and between countries throughout the region in terms of political, economic, social and cultural realities, current and historical, with consequent implications for the realities of ALE in each country. Indeed, in order to achieve any kind of understanding of ALE in the region, it is imperative to keep in mind the heterogeneity of the political, socio-economic and cultural contexts.

The broad contexts for ALE and, thus, the demands being placed on ALE, vary significantly throughout the region. The more industrialised countries point, inter alia, to the need to increase productivity and competitiveness in a situation of globalised production distribution and communication processes; new organisational practices; technological advances; sectoral changes; ageing populations; labour and skills shortages and mismatches and the low skills levels of millions of workers; the need to maintain social cohesion and democratic

institutions in the face of ailing social insurance systems and social fragmentation; the widening gap between low and high earners; the growth in immigration; the need for sustainable development and the preservation of natural resources. Transition and developing countries underline recent political and civil strife with residual high volatility in some areas; fractured societies, depleted infrastructure and poverty; the challenges of establishing democratic institutions and practices; the need to build institutional and legislative frameworks; the challenging transition to a market economy; the need to strengthen the private sector and achieve a higher level of macro-economic stability and sustainable development; the underdeveloped labour market; high levels of unemployment/long-term unemployment and the low education and skills levels of the labour force; labour shortages/'brain-drain'; ageing populations; and the need to establish an adequate system of social and health protection.

What all countries in the region share, however, is a common international context of rapidly changing globalised economies, communications and human cultural perspectives, where knowledge is a key resource, and where the need for skilled workforces and active citizens is making increasing demands on education at all levels.

The supranational body, the European Union (EU), is a major player in the development of ALE in many countries in the UNESCO region, through the lifelong learning policies, goals and directions of its Lisbon Agenda as encapsulated in the *Education & Training 2010* programme. Twenty-seven countries are member states of the EU; **Iceland** and **Norway** work closely with the EU in the context of *Education & Training 2010* and the Union's Lifelong Learning Programme; **Switzerland** participates in the EU Bologna (higher education) and Copenhagen (vocational education and training) processes and in the Lifelong Learning Programme; seven states (**Turkey** and **South Eastern Europe**) which have pre-accession status with the EU are endeavouring to bring policies and practice in line with those of the EU.

Throughout the report, the term 'EU-27+' is used to denote the EU-27 plus some, or all – depending on the context – of Iceland, Norway, Turkey, Croatia and Montenegro. The last three have official candidate status with the EU. **Israel, Georgia,** and five states of the Commonwealth of Independent States (CIS) participate in the European Neighbourhood Policy of the Union (ENP) which supports human resource development. The **Russian Federation** has a special Strategic Partnership with a human resource dimension with the Union. Within the EU's enlargement policies, the European Training Foundation (ETF), an EU agency, supports transition countries in harnessing the potential of their human resources to increase prosperity, create sustainable growth and promote social inclusion. Thus, mechanisms such as Instruments for Pre-accession Agreements (IPA) and the ENP are transmission routes for lifelong learning policies and practices being promoted by the EU.

Sources and limitations

The national reports from 38 countries (Appendix 2) in the region are the main source for this report, supplemented by material from other sources.

Certain limitations in the national reports impact on the report. First, countries mainly describe the état de lieu of ALE in 2008 rather than developments since 1997. Second, the nomenclature and scope of ALE appear to have presented challenges to some. Third, for historical, political-educational and resource reasons, publicly-funded ALE opportunities are at a low level of provision in some countries and the main focus may be on initial vocational training (IVT) and on 'second chance' provision for young early school leavers. Fourth, a number of reports present limited or no information on non-formal ALE either because the information is not systematically collected and/or because there is a low level of provision, publicly-funded or not. Moreover, ALE in the tertiary sector gets limited coverage and little or

no reference is made to informal learning. Finally, different parameters and different interpretations of what constitutes ALE give rise to challenges regarding statistics. Thus, the report relies on harmonised international statistics to give a sense of the volume and distribution of ALE in the region.

The policy and governance environment/ context

Under Theme 2: *Improving the conditions and quality of adult learning*, delegates to CONFINTEA V committed to *recognizing the new role of the state and social partners* in the promotion of adult learning:

> *by ensuring that all partners recognize their mutual responsibility for establishing supportive statutory frameworks, for ensuring accessibility and equity, for setting up monitoring and co-ordination mechanisms, and for providing professional back-up for policy-makers, researchers and learners through networking resources.*
>
> (*Agenda for the Future*, Par 23 (a), p. 15
> UNESCO Institute for Education (1997b)

Eleven years on, the extent to which the CONFINTEA V commitments have been honoured is arguable. The 2002 Sofia Declaration noted that "many countries (in the region) do not have the policies, frameworks and structures required to advance Adult Education. These requirements include new legislation, adequate financial support, appropriate institutional structures, effective administrative systems, quality frameworks and the conditions required to support effective partnerships and lobbying" (Medel-Añonuevo 2003). In 2006, the European Commission stated that "adult learning has not always gained the recognition it deserves in terms of visibility, policy prioritisation and resources" in the EU (European Commission 2006a). In the same year, BUSINESSEUROPE, representing employers in 34 countries, called for: a joint approach to lifelong learning; policies that focus on competence development to generate increased investment; emphasis on specific skills and/or groups; partnership approaches and better access to information and guidance (Higham 2006). In 2007 the Commission reiterated that adult learning "still needs greater recognition in terms of visibility, policy prioritisation and resource" (European Commission 2007a).

Early in 2008, the European Commission's progress report on *Education and Training 2010* noted important gaps in the coherence, co-ordination and comprehensiveness of lifelong learning strategies in the EU. The report covers VET and adult learning in the same chapter and, significantly, points to a lack of clarity on the boundaries between adult learning and VET in a number of the national reports which form its basis (European Commission 2007b).

The ALE challenges in the EU are multiplied in **South Eastern Europe, CIS** and **Georgia,** where the adult phase of lifelong learning has – for the first time since the collapse of politically-controlled top-down ALE provision – begun to reappear on the political agenda in the form of vocational training to address high unemployment and low economic activity. Pressing issues include deficiencies in: the status of ALE; policy; legislation; social partnerships and civil society involvement; resources; VET and labour market match-up; transparency of qualifications; staff skills; political attention to ALE for social and cultural purposes; 'learning culture' among the population. **Israel** notes a need to promote relevant forms of literacy learning, foster human capital development and enhance intercultural solidarity. The **USA** notes a need for increased investment in adult basic education (ABE) and adult secondary education (ASE).

Supra-national influences on policy-making in the region

In terms of overall ALE policy goals, the reports from the EU-27+ point to the EU Lisbon Agenda's overarching twin goals of making Europe 'the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion". 'Lisbon' is the compass, the direction, and the destination; and lifelong learning is harnessed in a functional way to the achievement of the knowledge economy and the knowledge society. Primarily, ALE is expected to deliver competence development and labour market-related qualifications within and outside enterprises as part of human resource development to sustain economic growth. It is also expected to contribute to the maintenance of democratic values and institutions, and to societal and personal development. Significantly, the national reports pay scant attention to possible inherent tensions between the two goals. Nor, incidentally, do the national reports reflect on possible tensions inherent in the development of public policy on (adult) learning which, unlike (adult) education, has traditionally taken place in the private sphere.

The EU Action Plan on adult learning (European Commission 2007a) identifies five concrete priority goals for ALE viz., to reduce labour shortages by raising skill levels and by upgrading low-skilled workers; to offer a second chance to those who enter adulthood without qualifications; to reduce poverty and social exclusion among marginalised groups; to increase the integration of migrants in society and labour markets; and to increase participation in lifelong learning, especially among older workers.

Many reports mention the influence on national policy-making of OECD through the IALS and ALL studies (OECD and Statistics Canada 2000; 2005) and the forthcoming PIAAC study (OECD 2008) and of the UNESCO institutes, in particular UIL. However, for many countries in the region, the main supra-national influence is the European Union. National education policy is decided by each individual country in the EU-27, but together they set common goals and share best practice at EU level. The Lisbon agenda in the field of education and training is operationalised by the *Education and Training 2010* programme (2002) which involves policy-makers, the social partners, civil society and European-level organisations and covers all education and training levels and modes of learning within a lifelong learning framework. The European Commission stimulates action on the programme and provides (voluntary) education and training benchmarks which operate, in practice, as political obligations. In fact, since 2002 benchmarks, reference tools, frameworks, communications, conclusions, recommendations and research have emerged in rapid succession from the Commission in a bid to encourage, nudge, persuade, push and pull education and training systems in the member states towards the Lisbon goals.

It is noteworthy that up to recently ALE had not figured strongly in the work of *Education and Training 2010*. Within this context, the European Commission sought in 2006 to promote adult learning through a dedicated Communication (European Commission 2006a) which underlines the importance of adult learning to support adults' employability, their mobility in the labour market and their acquisition of key competences, while also promoting a socially inclusive labour market and society. The Communication highlights the importance of increasing participation in adult learning, the need to foster a culture of quality, the importance of implementing systems for validation of non-formal and informal learning and the need to improve the quality and comparability of adult learning data. Two specific target groups, viz., the ageing population and migrants, are identified in the Communication. The follow-up Action Plan (European Commission 2007a) highlights actions by the Commission to support the implementation of the Communication by the member states. In May 2008 the European Council (Council of the European Union 2008) endorsed the Communication and the Action Plan and called on member states to implement their key messages.

The EU Lifelong Learning Programme (LLP) 2007-2013 provides important practical support for the implementation of lifelong learning policies, and the Grundtvig and Leonardo da Vinci

sectoral programmes seek to address the challenges of general adult learning and VET (including CVT), respectively. In addition, education and training – including ALE – are key dimensions of other EU policies, including employment, information society, active citizenship, environment, consumer affairs, and social policy. In particular, the European Social Fund (ESF) is a major funder of IVET and CVT for adults in the EU.

As part of the EU's external assistance programmes, the ETF works with partner countries to apply human resource development strategies to socio-economic development. ETF's policy learning approach enables **Georgia** and countries in **South Eastern Europe** and **CIS** to engage in learning processes on a cross-country and cross-regional basis (European Training Foundation 2008a). One commentator believes that the EU has made a significant contribution towards ensuring that governments in the area assume responsibility for ALE (Samlowski 2004).

National policy-making

The adoption of a lifelong learning approach to ALE has important implications for national policy-making. Public policy has to create the frameworks – legislative, governance, financial, institutional, learning, informational, qualifications and regulatory – to motivate adults to engage in structured learning (Jones 2005). In addition, the promotion of ALE requires 'collateral' policies in related areas such as employment, welfare, rural development and poverty reduction and monitoring and evaluation of policy impact across many ministries and agencies.

The majority of the national reports display a high level of commonality in their rhetoric. It is evident that the concept of lifelong learning is operating as a vision for education and training in the majority of countries and, in many countries, it is also providing a conceptual framework for policy-making and a guiding principle for provision and participation across all learning contexts, including ALE. However, beyond the rhetoric, the realities of ALE on the ground vary between countries, depending on recent history, the socio-economic context, the underlying education and training system and traditions, and the level of development of ALE policy, governance and provision.

A key question in ALE policy is whether it is primarily an economic policy, a social policy, a cultural policy, or a combination of all three. In many countries, policy statements adopt a holistic approach to ALE, stressing both economic and non-economic outcomes. However, when it comes to implementation, there is evidence of tension between an emphasis on productivity and competitiveness through human resource development, and an emphasis on human potential development for social inclusion for individuals and social cohesion for societies. Policy implementation privileges the economic agenda through providing greater public support for vocationally-oriented adult learning than for liberal/popular adult learning. In fact, in many countries, ALE policies are inseparable from labour market policies and the development of the individual is primarily instrumental. The reports from a small number of countries describe continuing vocational education and training only. This is most in evidence among recent EU member states and in South Eastern Europe and CIS countries. There is also an imbalance between ALE in formal education and training institutions and the development of skills in the workplace in these countries as traditions and structures limit social partner intervention, and employers are unable or unwilling to address the issue of workplace learning.

To date, a total of 17 of the EU-27+ have adopted overarching lifelong learning strategy statements of some type, covering different education and training sectors. These statements set out national policy priorities and have put in place action plans and specific programmes to achieve greater efficiency and to improve quality and quality outcomes.

Lifelong learning is becoming a reality in **Denmark, Iceland, Norway, Sweden** and **United Kingdom**. However, in 2007, eight countries were still preparing overarching strategy statements and seven countries were still pursuing lifelong learning policies without an encompassing, overarching lifelong learning strategy (European Commission 2007b). **Cyprus** and **Romania,** which have yet to complete overarching strategies, note the challenges involved in generating a national debate and responding to the perspectives of different interest groups. The latter notes that, apart from vocational training, ALE is not the 'subject of coherent strategies, policies and specific regulations'. Overall, a key challenge in the majority of EU-27+ countries is policy implementation**.** In **Switzerland,** political attention has always focused on vocational ALE and there is currently a national debate on the definition of ALE.

In **South Eastern Europe, CIS** and **Georgia,** ALE is considered to have a primarily developmental role in kick-starting and/or contributing to economic growth and poverty reduction. The role of ALE in achieving civil integration and social cohesion and in promoting democratic values and institutions is less emphasised. In **Israel**, ALE is seen as making a key contribution to the integration of immigrants, and to economic growth and competitiveness. In the **USA,** ALE is seen as contributing to the growth of the economy through raising adult literacy levels, supporting the acquisition of English by immigrants and contributing to the skilling of workers.

The initial stages of a systemic approach to policy-making in ALE are in evidence in individual countries in **South Eastern Europe** and **CIS** and **Georgia.** In **South Eastern Europe** projects like the Lifelong Learning Advocacy Project of DVV International seek to focus the attention of policy-makers and other stakeholders on the need for a coherent policy framework linking the different strands of economic, labour, educational and social policy, and to demonstrate the strategic role of investment in skills, and hence in adult learning (Dimitrova 2007). However, many of the VET reforms in the area focus on initial training and the volume of CVT is limited. The **Former Yugoslav Republic of Macedonia** has developed an Adult Education Plan and is promoting access for individuals from ethnic groups with low education levels. **Serbia** has developed a Strategy for the Development of Adult Education, a Strategy for the Development of Vocational Education (2006), action plans and active labour market policies. In 2006 model legislation on adult education was adopted by the Inter-parliamentary Assembly of the **CIS**. The *Concept for the development of adult education* was also adopted and a plan for the implementation of the Concept in **CIS** member states was elaborated. **Ukraine** seeks to bring ETF-supported projects into a coherent policy learning process. **Moldova** notes the adoption of the 'Conception regarding the orientation, training and professional education of human resources' and the Labour Code in 2003. The latter sets out the responsibilities of employers in relation to the training of employees. In **Georgia,** where work on a lifelong learning strategy began in 2008, ALE has limited practical expression on the ground apart from a number of programmes for unemployed people, but there is recognition in the education ministry of the need to target 'at risk' groups. In **Russia,** the concept of the Federal target programme for the development of education for 2006-2010 is the main document that defines both the concept of continuing education and its separate elements, including adult education.

Governance of ALE

An entity – such as a government or an education and training provider – organises itself in order to make and implement decisions. Key dimensions of its governance will include information, consultation, participation, process, equality, rights and reforms. Good governance will be marked by clear communication, open consultation, diverse participation, equality of access, transparency in decision-making, adequate resources, good capacity and accountability. Using these criteria, it is clear that the governance of ALE faces numerous challenges in many countries in the region.

Depending on whether ALE is considered a public good, a private good or both, the ALE model will be a public service model, a market model or a mix of both. Thus, the overall role of the state in relation to ALE in the region ranges along a spectrum: from strong involvement of the state to promote ALE as a public good, to minimal involvement, the provision of ALE being more or less left to market forces. A country's position on that spectrum may be dictated by ideology, tradition, resources or a combination of all three. In **Sweden,** where the articulated role of the state is to create opportunities for versatile learning, the goals and regulations for all education, apart from liberal adult education, are defined by the state. A formal tripartite system is in place to oversee ALE for the workforce. In **Poland,** the educational services market began to expand in the 1990s. As an external assessment of the education market commissioned by the education ministry put it, 'the general rule adopted for the education policy states that the needs of the labour market are best met by a fully free market of education services. The state, by creating for adults the opportunity to complement their education in school types of training, practically does not intervene in the scope of the non-school offer'. To improve the quality and effectiveness of courses for the unemployed, employment agencies were obliged in 2007 to consider the quality certificate held by the provider of training and to analyse training offers in terms of their compatibility with the requirements of the labour market. Putting publicly-funded training out to tender is also considered a way of achieving improved relevance and quality.

In **Germany,** the activity of the state in the area of ALE is generally limited to the stipulation of principles and basic parameters, and to the introduction of rules to ensure that ALE is properly organised and supported. These rules are then incorporated into the laws of the Federation and the Länder which lay down the basic conditions governing public-sector support of continuing education. **The Former Yugoslav Republic of Macedonia** states that, rather than invent, manage, or pay for a comprehensive system of lifelong learning, the role of the government is to redistribute resources so that the available opportunities will be equitable, systematic and efficient.. **Serbia** observes that although a strategy for the development of adult education has been adopted, the national context makes it very difficult to address ALE issues. **Armenia** notes that adult education is not being governed or coordinated at national level by any state structure However, there is a focus on involving the social partners in the governance of VET and the development of a plan of action for the Strategy on Adult Education. In the **USA,** the federal Department of Education sets policies and administers and coordinates federal financial assistance to the states for ALE.

Structures and frameworks are required at international, national, regional, municipal, community and institutional levels to ensure flexible support for the provision of lifelong learning opportunities and to enhance participation, especially in ALE.

Political responsibility for ALE is fragmented in many countries, with multiple ministries having responsibility for some aspect of ALE. This is the case in **Latvia,** for example, where nine Ministries, along with other stakeholders, are involved in the development of lifelong learning strategies and action plans. **Moldova** also notes the big number of ministries involved in ALE. Overall, co-ordination and co-operation between ministries remains inadequate in many countries. The responsibility for policy, provision and funding in formal ALE may belong to the education ministry or to both education and labour ministries. Welfare ministries are frequently involved in income maintenance for individual adult learners, finance ministries in providing financial incentives, while multiple ministries provide ALE for public servants and various sectors of the population. Where non-formal ALE receives public support, the funding role of ministries other than education is strongest where there is little or no reliable core funding for providers, as in **Portugal.**

Models of regulation of ALE vary across the region, However, there is growing emphasis on subsidiarity as part of public management principles, whereby authority for decision-making is located as close as possible to where ALE activities happen. The belief that sub-national levels of authority provide efficient and effective services is thus prompting a move in many countries away from direct central government administrative control towards greater

decentralisation of operational control. In addition, in a number of countries, decentralisation is seen as denoting a clear break with the historical 'command' economy. In a number of countries, this approach is paralleled by the generation of competition between providers, either by shifting some provision into the private sector or by introducing quasi-market relations into the public sector. To avoid exacerbating fragmentation of responsibility and intensifying regional inequalities, decentralisation needs to go hand in hand. with investment in up-skilling local authorities and providers in the efficient use of resources and increased central government regulation for accountability in relation to the quality of ALE standards, performance and qualifications.

Several countries have transferred responsibility for ALE to municipalities or other local level authorities. In **Denmark,** the Adult Education Reform 2001 established a shared responsibility for adult education between state, regional and local government. In **Finland, Norway, Portugal** and **Sweden,** the municipalities implement adult education policy. There has been an enhanced role for the regions in relation to ALE in **Hungary** since 2001. In **France**, the regions and communes are involved in ALE, either directly by promoting various forms of action, or indirectly by funding existing organisations and associations. In **South Eastern Europe, CIS** and **Georgia,** decentralisation is still at an early stage of development. In 2006, in preparation for VET decentralisation in **Russia**, ETF supported a training programme for local VET managers and for trainers from VET in-service centres (European Training Foundation 2008b).

ALE is pluralist in structure. Multiple partners have a stake in ALE policy-making and implementation, all frequently operating from diverse values, attitudes, expectations, objectives and approaches. Stakeholders include government at all levels, statutory agencies, social partners, public providers, non-governmental organisations (NGOs) including civil society organisations (CSOs), commercial providers and, not least, potential learners and their representatives. Good governance decrees good learning partnerships. At systems level, this partnership would be between and among government bodies, social partners, civil society and other stakeholders; and at the provider level, between and among the educational institutions and local-level social partners, civil society and learners' representatives.

There is evidence from a number of countries in the EU-27+ of a general thrust towards co-ordination and coherence across adult learning structures to establish links and reciprocal engagement across heterogeneous groups. Social partners and civil society are being increasingly recognised as partners in ALE, and their involvement ranges from consultation to participation in formal structures at national and/or regional levels. Social partners also influence ALE policy through the collective bargaining process. Some countries have a long tradition of involving social partners and stakeholders and institutional arrangements typically include a comprehensive network of national, regional and local consultation committees for a well-developed social dialogue underpinning lifelong learning, for example in **Austria, Cyprus, Denmark, France, Germany, Netherlands, Norway** and **Sweden**. In relation to training for the workforce, the **United Kingdom** remains committed to a voluntary approach. State intervention focuses strongly on stimulating employer and individual demand by improving quality and the responsiveness of providers, and by developing supporting services to make training attractive to employers (including the creation of employer led Sector Skills Councils, a reformed qualifications system due to be rolled out from 2008, and the Train to Gain service). However, as the 2006 government-commissioned report on skills pointed out, the current poor qualification base is a result of this model, and government has indicated that it will consider regulation at a future date if employers do not voluntarily increase their investment in training. In addition, since 2006, in an expansion of the Union Learning Fund model, UnionLearn, the academy for trade union learning in the **United Kingdom**, has played a key role in refining the role and nature of trade unionism, particularly in relation to brokering learning opportunities for their members.

Partnership finds expression in inter-ministerial, inter-institutional and inter-organisational co-operation at national, regional and local levels. It supports 'joined-up' thinking and responses, along with a drive towards systemic cross-sectoral policy-making in the interests of creating an overall lifelong learning system. A number of countries have established national/regional co-ordinating bodies for ALE. Such bodies bring together adult learning stakeholders, including government ministries, social partners, representatives of statutory providers, learners and non-governmental interests, with a view to increasing the quantity and quality of ALE. Depending on their level of autonomy, they may have policy-making and implementation, policy co-ordination and/or policy advisory roles.. Since 2000 the Swiss Forum for Adult Learning has acted as an advisory board composed of representatives from federal offices (education and training, employment, culture), cantons, and ALE providers in **Switzerland**. In 2005 a second committee, the Swiss Coordination Conference for Adult Learning, was established to coordinate ALE-related matters between the Confederation and the cantons.

Regional and local networks of the various stakeholders working together on labour market policy, social policy, policy on ALE, including territorial coverage, are another useful approach to partnership at both systems and provider level. In **Germany**, the Federal Ministry for Education and Research promotes ESF-supported regional networks in order to deliver innovative and integrated lifelong learning services. In the **Netherlands,** a shift in focus to regional networks is considered a significant innovation. In **Russia,** a 'learning community' project is experimenting with new approaches in promoting adult learning. In the **USA,** local employers are frequently partners in decisions by local ALE providers with regard to the learning content of vocational ALE for the local workforce. At provider level, the involvement of learners in the governance of institutions is emerging in a number of countries as a key component of good governance geared to responding to the learning needs of individuals and communities.

However, innovative learning partnerships for high quality, efficient and equitable education and training still elude many EU-27+ countries (European Commission 2007b). For example, countries like **Cyprus, Estonia, Greece, Lithuania, Poland, Slovenia** and **Turkey** are still at the preliminary phase of building up institutional arrangements at systems level. **Romania** notes the impact of a lack of coherence and limited social partnership on learning pathways and the recognition of learning. The problem of these countries at the preliminary phase of involving social partners is the weakness and fragmentation of organisations representing business interests (European Commission 2007b). In the recent EU member states, the involvement of trade unions represents a big change of role for both the trade union and the employers. In **South Eastern Europe, CIS** and **Georgia,** where these challenges are intense,, the partnership culture is insufficiently developed, Involvement in governance of the social partners and other stakeholders remains at the level of rhetoric in the majority of these countries.

The growing co-ordination and coherence agenda visible in formal ALE in a number of countries does not necessarily extend to non-formal ALE. The reports indicate that in the vast majority of countries, civil society gets limited recognition as a key player in ALE. However, non-formal ALE is not without co-ordination mechanisms. National/regional representative associations of non-formal ALE providers and, in some cases, learners, may have a role in policy-making at national and regional levels. These associations may promote participation; promote quality provision; carry out research; and participate in EU-funded co-operation projects. In **Armenia**, for example, the Armenian Association for Adult Education which has a membership of 36 NGOs, is a key national partner in donor-funded projects. In **Georgia,** the Georgian Adult Education Association fulfils the same role. Both associations,, along with many other national adult education associations in the region, are members of the European Association for the Education of Adults (EAEA).

Legislative framework

Legislation involves a thrust towards co-ordination, coherence and, on occasion, integration of policies, structures, financing, provision and qualifications.

Specific legislation covering VET, frequently as part of labour laws, exists in virtually all countries in the region, and CVT is often covered by the VET legislation. At least twenty countries have put in place specific legislative frameworks for formal ALE delivered in education and training institutions. These countries are: **Armenia**, **Belgium, Croatia, Czech Republic, Denmark, Estonia, Finland, France, the Former Yugoslav Republic of Macedonia, Germany, Greece, Hungary, Lithuania, Montenegro, Netherlands, Portugal, Norway, Slovenia, Sweden** and the **USA**.

In 1998, the **USA**, incorporated ALE into the Workforce Investment Act as the Adult Education and Family Literacy Act (AEFLA). Under this Act, adult education and literacy services to assist adults to complete secondary education and get skills for employment are provided. In South **Eastern Europe, CIS** and **Georgia,** where systems in general are firmly rooted in law, legislation is considered a critical first step in the development of ALE. In the **Former Yugoslav Republic of Macedonia**, the education ministry is obliged by law to create a strategy for ALE and secure financial resources for its implementation in accordance with “the needs of the country and the European Union”.

However, the drafting of laws for ALE is not always preceded or accompanied by a parallel development of coherent policies, strategies and actions, some of which, such as the development of a partnership approach, require more than a legal structure.

While specific overarching legislation to cover non-formal ALE is the exception rather than the rule across the region, examples of such overarching legislation are in place in nine countries: **Belgium (Fr), Denmark, Finland, Estonia, Hungary, Latvia, Lithuania, Netherlands** and **Sweden. Armenia** notes that a concept paper defining and regulating the basic legal and organizational provisions of ‘non-formal education’ was approved in 2006. Legislation integrating all aspects of adult learning, formal and non-formal, has been enacted in a small number of countries, for example, in **Denmark, Finland, Netherlands, Romania** and **Sweden**.

A statutory right to adult education at different levels is emerging in a number of countries. In **Sweden,** all adults who meet certain criteria have the right to basic education. In **France,** in 2004, a national agreement established an individual right to training. In **Norway,,** adults have a right to free education up to and including, upper secondary level. In 1961 adults in **Turkey** who could not continue their education for whatever reason were given the right to education in remedial classes and courses to increase their general knowledge and employment prospects. Some countries, for example, **France** and **Belgium**, guarantee access rights to education and training for all adults through educational leave schemes.

Financing of ALE

Under Theme 9: *The economics of adult learning*, delegates to CONFINTEA V committed to improving the financing of adult education

> *by contributing to the funding of adult education by bilateral and multilateral financial institutions within the framework of partnerships between the various ministries and other governmental organizations, non-governmental organizations, the private sector, the community and learner.*
> *(Agenda for the Future* Par 49 (a) p. 26)

Financing ALE is an ideological as much as a technical issue and government stances on the matter represent different political cultures, including attitudes to the role and benefits of education and training, to the responsibilities of various stakeholders and to governance arrangements for ALE. Investment in ALE by any stakeholder depends, explicitly or implicitly, on the perception of 'added value', on whether ALE is viewed as a public or private good or a combination of both, and on whether financing ALE is considered investment or expenditure. If it is the former, what kind of investment in ALE is it?

Governance also informs decision-making and practices about financing ALE. The roles and responsibilities of the social partners vary across the region and in recent EU member states, South Eastern Europe, CIS and Georgia, the role of social partners is evolving rather than firmly established. In other countries in the region, social partners are formally or less formally involved to a greater or lesser degree in financing and other arrangements for ALE. In general, governments in the region are seeking to broaden financial responsibility for ALE by promoting cost-sharing through stakeholder co-financing, partly as a response to scarce resources, but also, in many countries, as part of an increasingly market-oriented trend in education and training. However, in varying degrees, all governments in the region go beyond a general steering, managerial and co-ordinating role to recognising a role for public investment in ALE in cases of market failure, and in pursuit of an equality-and-redress agenda for 'at risk' groups such as unemployed persons, low-skilled workers, immigrants, older workers and seniors.

Statistical information on investment in ALE is far from complete in the majority of reports and the information that is presented is not readily comparable. It is difficult to build a true picture of over-all expenditure by all or any of the stakeholders in any country. The OECD has drawn attention to the overall low levels of investment in ALE in a range of countries in the region (OECD 2003). It is reckoned that most governments are spending under 1 per cent of national education budgets on ALE, and even often, only a small fraction of 1 per cent (Archer 2007).

There appears to be growing downward pressure on investment in ALE in some countries. A 2002 report from the European Commission noted that the decrease in public investment in ALE had been very sharp over the previous decade in countries that were to join the Union from 2004 onwards, and feared that budgetary constraints and the high level of public expenditure on formal education would militate against any future expansion of funding for ALE (European Commission 2003a). **Germany** notes that total stakeholder financing for ALE underwent a slow but steady decline from €27.8 billion in 1996 to €24.1 billion in 2006. Public spending on ALE in the same period fell slightly from €1.5 to €1.4 billion, while, in a bid to cut costs, the Federal Employment Agency's spending on ALE fell from €8.0 billion to €1.3 billion.

Investment in ALE is a 'hot topic' in all countries. In the EU-27+ discussions have been stimulated by the Lisbon agenda and a series of hortatory communications and reports from

the European Commission (2001; 2003a; 2003b; 2003c; 2006b) calling on member states to create the fiscal and regulatory incentives for more public and private investment in ALE.It also called for increased investment from all stakeholders, especially enterprises. In 2002, the Commission reminded member states that the contribution of education and training to growth had been widely acknowledged. Estimates suggested that investment in education and training produces rates of return to individuals and to society that are comparable to investment in physical capital (European Commission 2003a). In addition, OECD has demonstrated that an equitable distribution of skills has a strong impact on economic performance (OECD 2005).

Investment in ALE in the region

While in virtually all countries investment in ALE is multi-source, including public authorities, enterprises, civil society organisations (CSOs) and individuals, the national reports tend to focus on public investment, generally due to limited or, indeed, no information about investment by other stakeholders. Moreover, reports make little or no reference to changing cost structures implicit in emerging developments in ALE, such as the validation of non-formal learning and the growth in ICT-assisted learning. A number of countries (for example, **Denmark, France, Germany** and **Switzerland**) have established a national body comprised of ALE stakeholders to investigate how ALE might be financed. Inter alia, recommendations include: multi-channel funding models; cross-sectoral 'whole of government' inter-ministry funding; decentralisation of financing to regional/local levels; a retargetting of public subsidies from providers to individuals thus promoting individual responsibility and quasi-markets in the field of ALE; the restriction of public support to 'second-chance' basic and secondary ALE, and vocational ALE for low-skilled individuals.

Commitment to direct public provision of ALE differs between countries. In some countries (for example, **Germany** and **Norway**), the bulk of adult learning is privately provided with varying degrees of public funding; while in others (for example, **Denmark, Finland** and **Sweden**), public authorities are significant providers of adult learning. Many reports also mention the European Social Fund (ESF) and the EU Lifelong Learning Programme 2007 – 2013 as sources of ALE funding.

Supply-side grants to providers through regional and/or local authorities or – less commonly – directly, is the widespread approach to financing ALE in the majority of countries. An exception is **Georgia,** which plans to extend the funding arrangement whereby individuals receive funding to use in a secondary or higher education institution of their choice to other levels of education and training.

In **South Eastern Europe, CIS** countries and **Georgia,** the financing of ALE is limited, fragmented and mainly project-based. Funding sources include limited national public funding; a wide range of foreign donors including World Bank, European Investment Bank, Eurasia Foundation, ILO, USAID, UNESCO and UNDP; European bilateral aid, frequently channelled through NGOs or directly from government to government; and EU aid through the IPA or ENP structures. The reports point to a low level of involvement by employers and, in almost all cases, limited individual investment.

Public authorities in the majority of countries intervene in the 'training market' for market failure and equity reasons to fund ALE provision for various categories of adults who are unlikely/unable to self-finance or to be financed by employers, including low-skilled workers, unemployed adults, individuals outside the labour force, immigrants and people with low education levels. Virtually all countries fund training and retraining for unemployed adults as part of active labour market measures (ALMs), frequently through the labour ministry and the employment services. The EU-27 countries are entitled to draw down co-financing from the European Social Fund (ESF). Among recent EU member states and in **South Eastern**

Europe and **CIS** countries, investment in ALMs falls far short of requirements. The majority of reports note public supply-side funding for formal 'second-chance' provision, typically accommodated in mainstream schools. Literacy learning is funded in many countries, apart from those where it is considered that national literacy levels do not warrant such intervention. Given the 'compensatory' and redistributive role of this kind of ALE, tuition is generally free of charge to beneficiaries. In **Switzerland,** NGOs that provide ALE for low-qualified or disadvantaged people are in need of greater financial support. The majority of the **South Eastern Europe** and **CIS** countries indicate that adult literacy requires public funding. The **Former Yugoslav Republic of Macedonia** notes a first-time allocation in the 2008 budget to provide tuition for adults who have not completed primary education and for adults in prison. In the **USA,** almost any type of non-profit entity is eligible to receive federal funding to provide literacy and other ALE through competitive processes. Many countries fund language and cultural tuition for immigrants and, with few exceptions, it is provided free of charge. **Israel** notes that the provision of Hebrew tuition for immigrants is a major call on the ALE budget.

Encouraging enterprises to consider ALE as a key component of workplace and business development is a strategy in the majority of countries. However, information in the reports on investment by employers is patchy. According to IALS data, training for employed adults is mostly financed by enterprises or private individuals, while government finances training for the unemployed, and for people outside the labour force (OECD and Statistics Canada 2000). Available comparable data on nine countries in the region – **Canada, Denmark, Finland, Norway, Portugal, Spain, Sweden, Switzerland** and **United Kingdom** (**England**) – indicate that more than 50 per cent of those who trained did so with employer support (OECD 2003). In virtually all countries, public employers fund in-service training for public employees. In **South Eastern Europe** and **CIS** countries, this is frequently supported by the EU or other donors as part of consolidating and strengthening state institutions. Employee up-skilling and/or re-skilling are frequently part of wage agreements among the social partners. In all countries, SMEs are the least likely to invest in up-skilling their workers. In **Denmark** in 2007 social partners and the government signed a framework for financing lifelong learning, and the partners committed to reviewing lifelong learning reforms in 2009. **France** and **Hungary** note a statutory obligation on employers of a particular size to contribute to a national training fund, or to spend a stipulated sum on training their own employees. But there are wide variations across the EU-27+.

In the **United Kingdom**, in order to improve the efficiency of the "market" in education and training, two new structures are being put in place to improve information communication between employers and individuals. A brokerage service, "Train to Gain", has recently been created to assist employers in identifying and sourcing appropriate training which meet their particular business needs (and to subsidise such training when it meets broader government priorities). Alongside this, plans are in place for a much-enhanced Adult Advancement and Careers Service, to provide information, advice and support to individuals seeking appropriate education and training to meet their needs at work and in life. In **Scotland**, a new body, Skills Development Scotland, has been created with similar purposes. **Romania** notes that a 2006 survey showed that the discrepancy between Romania and the rest of the EU-27 remained approximately the same as it was in 1999, viz., investment per employee by Romanian enterprises was a third of the then EU average. In many situations, the responsibility for training is 'transferred' by the enterprise to the employee. Many **South Eastern Europe** and **CIS** countries note that employers frequently show little or no interest in up-skilling employees or, if aware of the importance of up-skilling, are not able or willing to fund it. **Serbia** reports that a few employers do cover up-skilling costs but that the majority do not recognise a need for ALE.

Tellingly, the majority of national reports provide limited or no information on the financing – either by the state or through self-funding by providers or participants – of non-formal ALE. Providers range from organisations which are exclusively education-providers to those which include education activities within a framework of wider social and/or campaigning work.

Within this range, there are those that rely exclusively on public funds, those with mixed funding and those that are entirely self-supporting.

There is a spectrum of government attitudes to non-formal ALE which is reflected in investment approaches and levels. At one end of the spectrum, the intrinsic value of non-formal ALE is explicitly recognised by the state as a 'public good' as well as a 'private good,' with collective as well as individual benefits contributing to consensus-building and social cohesion. It plays a major role in the promotion of active citizenship and the maintenance of democratic institutions; and a strong role in reaching the individuals least likely to enrol in ALE. Thus, non-formal ALE tends to be supply-based within a well-developed infrastructure of public and non-governmental institutions. Civil society organisations (CSOs) receive public funding while retaining their independence regarding learning content and organisation, subject to being accountable for public funding. This is the situation in a number of mainly **Nordic** countries where the long tradition of public support for liberal adult education is being maintained in 2008.

The other end of the spectrum, prevailing in many countries, is characterised by a lack of, or limited, explicit public commitment to the role of non-formal ALE in the maintenance and/or creation of democratic institutions and social cohesion; multi-source funding from a wide range of non-statutory, private, philanthropic and demand-side sources with limited or, indeed, no public funding; a restricted capacity on the part of a fragmented civil society to deliver ALE; and what might be termed an 'heroic against-the-odds' approach in place of a more structured and professional approach (Eurydice 2007).

In **Finland**, where about half of liberal adult education costs are covered by public funding, a report on the financing of non-formal ALE led to legislation (2006) which strengthened folk high schools and prioritised citizenship education in the activities of the education associations. In **Sweden,** liberal adult education is largely financed by public grants which are supplemented by participant fees. In **Estonia,** public funds to support approximately 45 non-formal educational centres are allocated by way of competition. In the majority of the rest of the countries in the EU-27+, participants in liberal or popular education must pay fees. CSO providers of non-formal ALE in **South Eastern Europe** and **CIS** countries are frequently supported by foreign donors. In **Croatia,** ALE projects implemented by CSOs are funded primarily through international donations, while funding from the state budget amounts to approximately 30 per cent of costs. In the period 2004-2007, a total of 878 grants were made to Croatian CSOs for projects and programmes, institutional supports, regional development and decentralisation programmes. **Armenia** notes that some 300 NGOs providing ALE on civic, cultural and community development and environmental protection are funded, generally by international donors, but also by the state and by church organisations.

Many countries (for example, **Cyprus** and **Slovakia**) indicate a lack of robust statistical information on individual or household contributions to their own learning. However, apart from specific priority target groups, it appears that the costs of learning are being increasingly transferred to individuals. **Germany** notes that in 1996-2006 direct individual ALE costs, as a share of the total financing of direct costs, increased from 31.2 per cent to 47.7 per cent. In **Slovenia,** national survey findings indicate that around two thirds of participants in formal ALE programmes cover the costs themselves. In **Poland,** where most ALE courses are offered in a free market of commercial training services, surveys show that 33.4 per cent of the costs of courses in assessed institutions are covered by students. In **Armenia,** adults who pay for their own courses in ICTs, languages or accounting, are 'among the most active (ALE) actors'.

In this context of increasing pressure on individuals to finance their own learning, the CEDEFOP (2003) survey is significant, especially for public authorities. It revealed that between 39 per cent and 47 per cent of adults in the then EU-15 would contribute none of the cost of participation in ALE. It is instructive to note that the highest proportion willing to

pay was the 51 per cent who would pay for ALE with the expectation that ALE would lead to "a better private life'.

Incentivising investment in ALE

Deterrents to investment in ALE are numerous. First, the view that ALE is predominantly a 'private good' discourages public authorities from investing in ALE. Second, unresolved debates about whether financing ALE constitutes investment or consumption can deter financing of ALE. Third, views like those of OECD (2005) that public financing of ALE should be limited, justify and/or endorse lack of increases and/or reductions in public spending. Fourth, imperfect information about ALE and lack of ready visibility of its benefits – economic, social, cultural, political and personal – act as deterrents to all stakeholders. Fifth, scarcity of resources acts as a barrier for governments, enterprises and individuals. Finally, investments of money, time, energy, expectations in ALE – whether by governments, employers, civil society or individuals – is a notoriously risky business in terms of returns (OECD 2003).

While there has been an increasing emphasis on stimulating demand for ALE, there has not been a parallel focus on increasing public supply for ALE in the majority of countries. This is due to economic pressures and the rise of a growing market orientation in ALE. Thus, public authorities seek to incentivise investment in ALE by other stakeholders, frequently on a cost-sharing basis. To this end, public authorities put in place regulatory and institutional arrangements conducive to enhancing investments by lower levels of government, enterprises and individuals.

In the **USA,** the states finance ALE through a combination of two elements in addition to their own budgets. The first is transfers from the federal government, based on population needs by census returns. The second is top-up funding based on the National Reporting System (NRS) measures of performance on educational gains and post-programme labour market placement of participants.

Employer-oriented policies include tax incentives, subsidies and training loans (especially for SMEs), collective labour agreements leading to the creation of training funds and compulsory agreements through levy-based schemes. Several training funds have received financial support from the ESF. Employee up-skilling and/or re-skilling are frequently part of wage agreements among social partners (European Commission 2007d).

To incentivise individuals to invest in their own learning, there has been a growth in individual-oriented, demand-led schemes. These are funded publicly, or through a public-guarantee mechanism, through social partners or through mixed funding which channel funding directly to the learner rather than to the provider, mainly for labour market purposes. Demand-side financing is predicated on the belief that the individual is best placed to choose his or her learning and on the expectation that the development of quasi-markets in education and training will raise quality through increased competition between providers. To be effective in the case of 'at-risk' adults, incentives need to be rigorously targeted and to go hand in hand with supports such as guidance, individual learning plans, learning support, free materials/examinations and childcare.

Demand-side incentives can be financial or non-financial. Some, such as tax incentives in **Cyprus, Estonia, Finland, Hungary, Lithuania, Poland** and **Slovenia** are passive measures that recognise investments already made. Others are active in that they aim to stimulate demand and range from general welfare measures (such as income maintenance, child/family allowances, housing benefit and transport costs), to specific financial aid to cover opportunity costs, loans, grants, training bonuses, scholarships/bursaries, training vouchers, individual learning accounts, pay-back clauses and paid educational leave. In **Austria,** some 290,000 training vouchers were issued from 2002 to 2006. Since 2007, a training voucher

system in **Sweden** is enabling providers of liberal education to reduce fees for individuals from the most unrepresented groups. In **Germany,** more than 100,000 ‘education cheques’ have been redeemed in North Rhine-Westphalia since 2006. Individual learning accounts have been introduced in a number of countries, including **Netherlands**. In **Montenegro,** participants in an elementary literacy programme received the equivalent of the minimum wage as a participation incentive. In many countries entitlement to paid educational leave, mainly though not exclusively for vocational ALE, is laid down by law, by collective agreement, or by both.

Participation in ALE

Under Theme 2: Improving the conditions and quality of adult learning, delegates to CONFINTEA V committed to

> *addressing the growing disparities between those who have access to adult learning and those who do not and to creating conditions for the expression of people's demand for learning through development of policy, legislation and access measures including guidance and counselling, enhanced relevance, enhanced co-ordination between agencies*
>
> (Agenda for the Future *Par 16-21, pp. 13-15)*

Educational achievement of adults in the region

Learning is a life-cycle process, thus achievement at one level builds the foundation for the attainment of skills and competences at the next level. Levels attained in initial education, therefore, have a significant impact on whether an individual participates or not in ALE, those with the lowest education attainment being the least likely to participate in ALE. This is the "double-edged sword" effect, whereby lifelong learning may have the effect of exacerbating inequalities in education and skills levels in the population overall (Eurydice 2007).

All EU-27+ countries reported an increase in the share of the population with medium to high levels of education in the period 2000-2006. In 2008, however, there are still almost 108 million people – virtually one-third of the EU workforce – with only the equivalent of lower secondary schooling (European Commission 2007c).

There are marked differences between countries in adult educational attainment levels. Under 20 per cent have low educational attainment (primary/lower secondary) in 10 countries: the **Czech Republic, Denmark, Germany, Estonia, Latvia, Lithuania, Poland, Slovenia, Slovakia** and **Sweden;** but more than 40 per cent in four countries: **Italy, Malta, Portugal** and **Spain**. Since 2000, upper secondary attainment in the EU increased slightly, from 76.6 per cent of people aged 20-24 to 78.1 per cent in 2007 (European Commission 2008a). In 10 countries, **Belgium, Cyprus, Denmark**, **Estonia, Finland, Ireland, Netherlands, Norway, Sweden** and the **United Kingdom,** more than 30 per cent of adults have higher education. The **USA** notes that of 191 million adults aged 16+ in 2000, 21 per cent had not attained a high school diploma/equivalent and were not enrolled in school. In addition, research shows that 25 per cent of adults aged 25-64 have limited English proficiency.

In EU-27, the share of early school-leavers (aged 18-24) declined from 17.6 per cent in 2000 to 14.8 per cent (females: 12.7 per cent, males: 16.9 per cent) in 2007 (European Commission 2008a). The Nordic countries and many of the recent member states already have less than 10 per cent share, while **Bulgaria** and **Romania** have shares of 18 per cent and 19 per cent, respectively. In **South Eastern Europe,** early school-leaving is a concern in all countries (European Training Foundation 2005). **Serbia** notes that over 22 per cent of the adult population have not completed elementary school.

Data on actual adult competences in the region are limited. The first report from the Adult Literacy and Life Skills Survey (ALL) (OECD and Statistics Canada 2005) shows how some countries have succeeded in building high skills levels in multiple domains, others have managed to improve the skills of the entire population and yet others have come close to realising lifelong learning for all. The survey of seven countries/regions, five of which are in the UNESCO region covered in this report, added problem-solving, numeracy and

information and communications technology (ICT) skills to the skills covered by IALS. Low skills are evident among all adults in significant – albeit varying – proportions, but there has been policy-generated progress in the last decade. **Canada** has achieved an equitable distribution of ICT skills that have enhanced productivity; **Italy** has attained the most rapid improvement in skills among the whole population; **Norway** has realised uniformly high levels of skill and is the closest to realising lifelong learning across the population; **Switzerland** has raised the performance of the least skilled the most. Proportionate to population size, the **United States** has built the largest pool of highly skilled adults in the world.

Data on the level and distribution of ICT competences among adults in the broader region indicate that adults fall on both sides of the 'digital divide' in terms of their access to ICTs and to ICT skills. Predictably, the digital divide runs along the same fault lines as, and reinforces, the ALE participation divide. In 2005, nearly 40 per cent of individuals aged 16-74 in the then EU-25 had no computer skills, and 34 per cent had never used a computer. This proportion ranged from 10 per cent of people who have never used a computer in **Denmark** and **Sweden,** to 65 per cent in **Greece**. In most countries, gender is not significant for ICT skills but age is, with 61 per cent of people aged 55+ having never used a computer (European Commission 2007c).

Participation in ALE

In 2003, the EU set the target of increasing participation in lifelong learning by adults aged 25-64 at 12.5 per cent by 2010 – a benchmark that was already part of the European Employment Strategy. There are substantial cross-national differences in the *incidence* and *volume* of ALE, but there are also remarkable similarities across countries in the *distribution* of ALE. Adults with a high level of education are more than *six times* as likely to participate in lifelong learning as the low-skilled. Adults aged 25-64 are *three times* more likely to participate in lifelong learning if they have completed at least upper secondary education (European Commission 2007c). Young employed adults with higher educational attainment in high-skilled occupations in large enterprises are the most likely to participate in ALE. In the EU-27 those least likely to participate include adults with low or no qualifications, the long-term unemployed, people in unskilled jobs, older adults, rural dwellers, people with disabilities, and immigrants. Many adults experience multiple disadvantages. In this context, the 108 million adults with low education levels in the EU-27 signal the extent of the challenges in the EU.

Increasing participation in adult learning remains a major challenge in the region. In the EU-27, participation increased from 7.1 per cent in 2000 to 9.7 per cent (females 10.6 per cent; males 8.8 per cent) in 2007 on a four-week reference period (European Commission 2008a). The best performer in the EU in 2006 was **Sweden** (32.1 per cent), followed by **Denmark** (29.2 per cent) and the **United Kingdom** (26.6 per cent). Low performers were **Bulgaria** and **Romania** (1.3 per cent each). Only seven countries have reached the 2010 target of 12.5 per cent participation rate (European Commission 2007b). In 2006, some 2.3 per cent of adults aged 25-64 in the EU participated in formal ALE, while 6.4 per cent participated in non-formal ALE. Under 1 per cent of persons aged 25-64 participated in both formal and non-formal ALE. To achieve the target of 12.5 per cent participation, an additional four million adults would need to participate in ALE (European Commission 2006a).

Switzerland notes 'a slightly decreasing tendency' in otherwise relatively stable participation rates, and participation 'reaches a considerable quota compared to other OECD countries'. In **Israel,** participation in ALE is considered 'an integral part of contemporary life' yet the majority of adults do not participate in it. In **Georgia,** the adult population is less involved in ALE 'than in the majority of European countries'. There appears to be no good reason to suppose that participation in ALE is higher in **South Eastern Europe** and **CIS** than the 1.3

per cent participation rates for those aged 25-64 on a four-week reference period in **Romania** and **Bulgaria** in 2007. **Russia** indicates that about 30 per cent of the population is covered by all types of ALE, but no reference period is given. In the **USA,** almost 50 per cent of adults aged 16 and over participated in some form of lifelong learning in 2001. However, in 2006–2007, only about 6 per cent (some 2.4 million individuals) of those eligible participated in federally-funded ALE programs, 38 per cent in adult basic education (ABE) and 16 per cent in adult secondary education (ASE). Adult English language learners comprised 44 per cent of participants in state-administered ALE in 2004-2005. This does not include English language learners in ABE, ASE or other programmes. In **Canada,** the 2003 International Adult Literacy and Skills Survey showed that 49 per cent of the adult population was enrolled in organised forms of adult education and training, including programmes, courses, workshops, seminars, and other organised educational offerings at some time during the year of the study.

More women than men participated in ALE in the EU-27. The rate of participation in continuing training of employed women ranged from over 55 per cent in **Denmark, Finland** and **Sweden,** to under 10 per cent in **Greece**, **Italy** and **Hungary,** and around 1 per cent in **Romania**. The rate of participation of men ranged from around 50 per cent in **Denmark,** to less than 1 per cent in **Romania** (Beck-Domzalska 2007). Women make up the majority of participants in particular adult learning activities in some countries; for example, in Universities of the Third Age in **Poland**, family literacy and specific literacy programmes in **Turkey,** and popular universities in **Israel**. In all the EU-27+, participation rates decreased significantly with **age.** Persons aged 55-64 years participated a third as often as persons aged 25-34 years (from 15.5 per cent for 25-34 to 4.6 per cent for 55-64 year olds) (European Commission 2007c). In **USA** in 2004–2005, only 4 per cent of ALE participants were aged 60 or older.

Priority ALE target groups

Targetting measures at specific groups is considered essential to increase participation in ALE by under-represented adults. Working age adults and unemployed adults are priority target groups in all countries in the region. As a policy priority, many of the EU-27+ also target adults aged 50+, including older workers. In **Germany,** the aim of the 50 plus initiative is to increase the level of employment among older workers; while in **Slovenia,** specific measures have been taken to improve access to ALE for mature workers and citizens without post-compulsory education as well as elderly and retired adults. In **Poland,** the Intergenerational Solidarity 50+ programme involves employers, providers and employment services in retaining older adults in the workforce. The **Czech Republic** is promoting Universities of the Third Age. However, the challenge in many recent EU member states relates to well-educated older workers who became unemployed early in the period of transition. In the **Russian Federation,** folk high schools are reaching out to senior learners, and in Israel there is a focus on older learners living in areas where the popular universities are not available or are too costly. In **Canada,** the Targeted Initiative for Older Workers is a federal-provincial/territorial cost-shared initiative providing support to unemployed older workers in communities affected by significant downsizing or closures.

Initiatives for the training of unemployed women have been launched in **Austria, Greece** and **Lithuania**. However, **Switzerland** notes that men are significantly better served than women in company-supported education and training, and in state-supported adult learning where approximately 80 per cent of participants in ALE supported by the VET law are men. In **Switzerland,** specific target groups include adults with low skills levels, and women re-entering the labour market. **Denmark** targets an increase in the number of participants in reading, writing and mathematics courses to 40,000 per year. In the **United Kingdom,** the government's main aim is to up-skill the population and to narrow the gap between those with high level qualifications and what has been described as the 'long tail of under-

achievement'. Historically, employers and individuals have not invested in qualifications at Level 2, as there is no immediate measurable benefit in terms of increased productivity, pay or job security. However, skills at this level are seen as being an essential platform for future skills development. Thus, in order to address this market failure and to create a high-skill economy, the government has decided to focus the investment of public education funds on helping people achieve a Skills for Life qualification, a full Level 2 qualification or a Level 3 qualification.

The provision of language and culture tuition and labour market skills for migrants is a major concern in almost all countries in the region. In Spain, the National Plan for the Social Integration of Immigrants provides Spanish language classes for adult immigrants; organises awareness campaigns and fosters cultural tolerance; and trains intercultural mediators and facilitators at regional and local levels. In **South Eastern Europe**, where the ethnic composition is very diverse, countries are responding to the needs of displaced indigenous groups and ethnic minorities, especially Roma adults whose educational attainment is typically low. In 2005, seven (now nine) countries (**Bulgaria, Croatia**, **Czech Republic, Hungary,** the **Former Yugoslav Republic of Macedonia, Montenegro, Romania, Serbia** and **Slovakia)** pledged to work together on the Decade of Roma Inclusion 2005 – 2015. The arrival of a significant number of migrants in the **Russian Federation** has put on the agenda the question of how language and cultural tuition will be financed. In **Israel,** which received more than 500,000 Jewish immigrants in the decade to 2006, Hebrew language instruction is a pressing priority. In recent years the **USA** has experienced a dramatic increase in immigration, resulting in a high demand for English language tuition.

Specific target groups are named by individual countries: adults with disabilities in **Slovenia** and **Serbia**; prisoners in **Belgium (Fr), Estonia, Latvia, Norway, Sweden,** the **Former Yugoslav Republic of Macedonia**; tourism sector workers in **Bulgaria**; young demobilised soldiers, community activists and non-Jewish groups in **Israel**; agricultural sector workers in **Serbia** and the **Former Yugoslav Republic of Macedonia**; the judiciary, health care, economic development, employment and rural development specialists in **Armenia**; and public servants in general in **South Eastern Europe** and **CIS** countries. In the **USA** "special populations" for ALE for almost 40 years include persons with disabilities, economically disadvantaged individuals, lone parents and individuals with limited English proficiency.

Overcoming barriers to participation in ALE

Barriers to participation in ALE are multi-dimensional, with a combination of factors on both the demand and supply sides. The former include the life-situations of adults and their attitudes to learning, while the latter are policy-related, information-related and provider-related. Addressing supply-side barriers can do much to mitigate the demand-side ones.

On the demand side, life situations that militate against participation are the following: low levels of education and lack of basic skills, unemployment, local labour markets that have a significant demand for low-skilled workers, limited financial resources, lack of transport in rural areas, physical, sensory and/or learning disability, ethnicity, age and family responsibilities. Many low-skilled adults lack the basic skills to participate in ALE, for example in **Lithuania, Poland** and **Turkey**. **Serbia** notes the low educational levels of the Roma population (over 60 per cent illiterate and without elementary education). For many adults, there is a lack of correspondence between participation and any increase in wages, and a return on the investment of time and money in ALE is not immediately visible, as noted by **Germany, Latvia, Lithuania, Norway, Serbia** and **Slovenia**. In addition, low-skilled adults may have unpleasant experiences in their initial education, or may lack the confidence to participate in ALE. In addition, in **Central, Eastern** and **South Eastern Europe** many adults recall a time when continuing education was 'more a penalty than an advantage' and, thus, are reluctant to participate in ALE (Strewe 2007).

The 2006 EU Communication (European Commission 2006a) affirms that public authorities must take the lead in removing barriers and promoting demand for ALE. To address barriers to participation on both the supply-side and demand-side, joined-up action is required on all policy fronts to create enabling legal, governance, financial, access, learning, qualifications and quality frameworks and explicitly-targeted inter-connected measures. **Slovenia** notes national research that indicates that motivation to participate is augmented by: incentives adapted to specific age groups; identification of role models; availability of guidance; support for costs; recognition of prior learning; individual learning plans; ICT-based options; access to qualifications and pay rises and/or promotion resulting from participation.

At systems level, joined-up measures to encourage and support participation include: the establishment of local partnerships to generate targeted financial incentives for individuals coupled with personal/family supports; publicly supported independent information and guidance systems; appropriate financial measures; enabling workplace arrangements; local availability of relevant learning offers; transparent national/regional systems to recognise and make visible learning outcomes; and quality assurance of the whole ALE experience. To focus and monitor efforts, some countries have set quantified national participation targets, for example, **Belgium**, **Estonia, Finland, Latvia, Netherlands, Portugal** and the **United Kingdom.**

At provider level – institution, workplace or CSO – a systematic approach to reaching reluctant, busy and/or sceptical adults requires placing the potential learner at the heart of provision through: outreach; needs analysis; validation of non-formal and informal learning; accessible, relevant learning offers; learning and practical supports; flexible scheduling and sequencing of provision; negotiated curriculum; adult-appropriate teaching/learning approaches including use of ICTs; learner-friendly assessment practices; access to qualifications with regional/national/international currency; effective transition points; and overall quality assurance mechanisms with ongoing opportunities for learner feedback.

In many countries, ALE provider infrastructure is inadequate. **Serbia** notes lack of infrastructure as a key reason for non-participation. In other countries, the multiplicity of providers and courses may be difficult to navigate. Critically, the unwillingness of employers to support employee ALE is an acute barrier to participation by **recent member states** of the **EU**, **South Eastern Europe** and **CIS**. In this context, it is necessary to look beyond traditional institutions to consider the role of non-formal and informal learning in the community, the workplace and the home. There is evidence that CSOs offering non-formal learning opportunities are well-placed – even best-placed – to reach adults in the least-likely-to-participate categories (OECD 1997b). Whole-community approaches can provide important social supports for adults. Study circles in **Nordic** and **other countries** illustrate how social capital in neighbourhoods can facilitate adults to undertake learning together (Healy 2001).

Many EU-27+ countries are endeavouring to address the critical lack of comprehensive adult guidance systems. In **Finland,** a joint initiative of the education and labour ministries is providing comprehensive internet-based guidance for adults. **Slovenia** has 14 local guidance centres located in folk high schools. In **Austria,** counsellors provide guidance to people with literacy and numeracy difficulties via the Alfa-Telefon.I In **Portugal,** a call centre was set up as part of a media awareness-raising campaign for ALE. Learning 'mediators' and 'ambassadors' are also emerging as part of guidance initiatives to reach non-participant adults. In 2007, the European Lifelong Guidance Policy Network ,with membership from 26 of the EU-27+ countries, was established to progress the implementation of the priorities identified in the EU Resolution on Lifelong Guidance (2004). In **Montenegro** vocational guidance services have been established. **Georgia** notes that 15 guidance specialists began work in training centres in 2007.

Learning festivals/events organised by partnerships of key stakeholders play a key role in promoting ALE in many countries as part of an international network of some 40+ such

events throughout the region, and beyond which has been supported by UIL. In **Germany,** some 100,000 people took part in approximately 500 events in more than 250 locations during the first Continuing Education Day in 2007. Since 1996, the Lifelong Learning Week in **Slovenia** has supported hundreds of promotional events annually. In 2002, international donors supported the first Lifelong Learning Festival in the **Former Yugoslav Republic of Macedonia** and in **Montenegro**.

Flexibility is a key principle in enabling participation in ALE. Personalised courses where the learner receives face-to-face, correspondence and/or online learning support are the ultimate in flexibility. In **France,** the network of Personalised Training Workshops provides personalised tailor-made learning for adults. Individual learning plans are also reported in **Hungary**, **Portugal** and **Sweden**. E-learning and blended learning which facilitate reconciliation of work, family and learning activities are noted by **Austria**, **Cyprus, Finland, Greece**, **Poland** and **Sweden**. In **Poland,** some 1,150 distance education centres are being established in rural areas to provide internet access, educational software and face-to-face and distance support. Distance learning is on the increase in the majority of countries. In 2007 in Belgium (Nl), the new decree concerning adult education conferred the authority to organise distance learning on the Centres for Adult Education. **Germany** notes that just over 100,000 people were engaged in distance learning at the end of the 1990s; the number reached 228,205 by 2006. In the **USA**, North Carolina has made distance learning a priority in its community colleges for post-secondary VET, reaching more than 12,500 students via the internet, satellite transmission, and teleconferencing. The overall ICT infrastructure in **South Eastern Europe, CIS** and **Georgia** and the basic ICT skills of the adult population are in need of development if accessible online learning is to become feasible.

Provision of ALE

Under Theme 5: Adult learning and the changing world of work, *Agenda for the Future* asserts that:

> *The right to work, the opportunity for employment and the responsibility to contribute, at all ages of life, to the development and well-being of one's society are issues which adult learning must address*
>
> *(Agenda for the Future* Par. 30, p20)

Adult learning is conceptualised as taking place on a continuum from informal, to non-formal to formal, depending on the distinguishing variables of purpose, intentionality, location, timing, structure, teacher-learner relations and outcomes. Formal adult learning is generally organised by institutions, is intentional, is structured (in terms of learning objectives, programme, time and/or support) and leads to recognised certificates and diplomas. Non-formal learning is structured and intentional from the learner's perspective, but is generally not provided by a formal education or training body and typically does not lead *directly* to certification. Informal learning resulting from daily life activities related to work, family or leisure is not structured and typically does not lead *directly* to certification. It may be intentional, but in most cases it is non-intentional or incidental/random (European Commission 2001). The relationship between the three modes is complex, and boundaries are permeable with a growing incidence of 'content migration' (Knoll 2005) between formal and non-formal ALE such as, for example, when a community-based organiser takes a vocational orientation to secure public funding or an individual acquires a skill both formally and 'on-the-job'. All reports describe formal learning and the majority of reports note non-formal learning. Links between the two modes are noted mainly in the context of the validation of non-formal learning within the qualifications system. Apart from references to public campaigns in areas such as health and environment, informal learning scarcely merits a mention in the reports, as it is beyond the regulatory and statistical reach of public authorities in virtually all countries.

Historically, organised ALE has always been provided by a wide range of organisations and institutions. However, data on provider infrastructure are fragmented and incomplete in almost all countries. Reports mainly describe public formal institutional providers of ALE, with surprisingly limited reference in many reports to tertiary education institutions as providers. The majority also refer to ALE providers such as employers, trade unions, trade associations, civil society organisations (CSOs), social and cultural bodies and commercial providers. In **South Eastern Europe, CIS** and **Georgia**, the 'material base' of the overall education system is poor and the focus since 1997 has been on the provision of initial education and training.

Research on publicly-funded providers of both formal and non-formal ALE in the EU-27+ in 2006 indicates that there has been a decline in the total number of ALE providers in the **Netherlands,** while **France, Greece, Poland, Slovenia, Spain** and **Turkey** have all seen an overall increase, including an increase in publicly-funded providers in **France**, **Greece, Ireland, Italy, Poland, Spain** and **Turkey**. **Belgium, Denmark, Germany, Netherlands, Slovenia** and the **United Kingdom (England and Wales)** have all seen a decline in the number of publicly-funded providers. Very little data are available on trends regarding the number of private sector providers, but where available it illustrates a growth in numbers. The number of NGO providers declined in **Belgium** and **France** but increased in all other countries, most notably in **Poland** where they have increased ten-fold in a decade (NIACE 2006).

Many countries point to efforts to strike a balance between plurality and coherence in the diverse provider landscape. National and regional advisory/regulatory bodies help, as do arrangements for the accreditation of providers. An emphasis on more joined-up measures is emerging in some countries as part of a region-wide trend towards learning communities, learning cities and learning regions to harness lifelong learning for economic development and social inclusion. **Germany** describes the "Learning regions – providing support for networks" programme which creates sustainable structures spanning different education sectors and providers. There is also a growing emphasis on 'one-stop shops', for example, adult education centres (**Cyprus** and **Greece**), territorial centres (**Italy)**, regional education centres (**Netherlands)** and centres for lifelong learning (**Slovenia)**.

What are adults learning?

The learning content of ALE is life-wide and life-related within a lifelong learning framework. In practice, ALE provision tends to be structured, in so far as that term can be used, into four areas:

- 'Second-chance' ALE is generally provided in or through formal education institutions for adults who left initial education without mainstream school or other qualifications, and who now wish to gain basic literacy skills, primary education, lower secondary and/or upper secondary (general or, more commonly, vocational) education. For adults who have not previously attended school, this may actually be a 'first-chance' opportunity. 'Second-chance' ALE generally comes under formal learning but literacy learning may be non-formal.
- Adult vocational education and training (VET), including initial vocational training (IVT) and continuing vocational training (CVT), aims at skilling, up-skilling and re-skilling for labour market purposes. It can be formal in training centres or workplace in-house facilities, or non-formal 'on the job' when embedded in work itself. It includes training for unemployed adults, adults outside the labour force and in-service training of employees in all sectors, public, private and voluntary.
- Liberal, popular or general ALE may be social and cultural policy and/or social movement. It comprises non-formal adult learning without direct links to the labour market, generally not requiring specific qualifications to enter, and is engaged in by the learner for personal, social, civic and cultural purposes. It may take place in education and training institutions, but, by and large, takes place outside and alongside the mainstream systems in a range of public, private and community-based settings and does not typically lead directly to formalised certificates.
- Adult tertiary education comprises continuing ALE at undergraduate level, postgraduate level and short vocational and/or special interest courses.

'Second-chance' ALE

Publicly-supported measures exist in virtually all countries in the region to ensure that adults with the lowest levels of initial education and training get *another* chance, a *better* chance and a *continuing* chance to gain compulsory and upper secondary education and training qualifications. 'Second-chance' provision addresses a wide range of divides, viz., the knowledge divide; the skills divide; the digital divide; the gender divide (among ethnic minorities, for example); the age divide, and disparities in the general population in the economic, social, cultural and personal domains. 'Second chance' provision is both a social inclusion and equality instrument and serves multiple purposes in all countries, viz., compensatory (recompense for learning not already achieved); educational (prepares individuals for next level); economic (raises skills levels); redistributive (increases access to learning and qualifications); promotion of equality (between different sectors of society); and

inter-generational impact (may have positive influence on the learning outcomes of the next generation) (Eurydice 2007).

Lower and upper secondary qualifications

Formal ALE, as an award-bearing 'second-chance' provision leading to lower, upper and post- secondary qualifications, is provided in establishments such as public schools for young people, second-chance schools, public adult-specific institutions, public vocational training centres, parents' schools and, less frequently, non-governmental organisations and commercial providers. While face-to-face provision is offered on a full-time or part-time basis during the day, in the evening and/or at weekends, web-based provision is increasing. In **Sweden,** the Adult Education Initiative (1997 – 2002) enabled over 800,000 adults (almost 20 per cent of the workforce) to return to structured formal adult learning to raise their education levels. Approximately 50 per cent of participants emerged with a higher level qualification. In **Finland,** the publicly-financed Noste Programme (2003-2009) is intended as a significant social innovation for gradually up-skilling employed adults aged 25 – 59 with less than upper secondary qualifications. Prior knowledge, skills and experience are built upon and the programme leads to a vocational or a flexible competence-based qualification. Additional subjects, such as languages, information technology or mathematics may be taken; support is available for reading and writing challenges – and Noste can also be used to support people to complete basic education. Important features of Noste include: inter-ministerial co-operation, the close involvement of the social partners, regional training pools of education and training providers, outreach guidance services, studies alongside work and an accompanying research programme. By January 2007 the programme had 16,700 participants, 58 per cent of the projected participant rate. In **Greece,** 48 second-chance schools target adults aged 18 – 40 who have not completed compulsory education and are unemployed or unskilled or have part-time or seasonal employment. On completion of a two-year programme, participants receive a certificate equivalent to a primary school qualification (Level I) or to a high school qualification (Level II). Regional and local authorities are frequently responsible for the provision of 'second-chance' ALE and in some countries, for example, in **Portugal** and **Norway,** adults have a statutory right to achieve secondary education qualifications.

In **South Eastern Europe, CIS** and **Georgia,** where the majority of the previously state-owned multi-functional buildings for ALE have fallen into disrepair and staff numbers have been reduced, limited publicly-funded 'second-chance' primary and lower secondary education is provided in schools and as project- and-programme-based provision for specific target groups. **Israel** notes that 3,000 students participated in 150 basic and high school classes for equivalency education and the skills required for employment in 2007. In the **USA,** local school districts (providing 54 per cent of provision), community organisations (providing 24 per cent of provision) and community colleges (providing 17 per cent of provision) offer ALE leading to basic education proficiency and high school diploma equivalency.

Literacy learning

The International Adult Literacy Survey (OECD 1995; 1997a; OECD and Statistics Canade 2000) indicated that between 25 per cent and over 50 per cent of the adults in a number of countries in the region lacked the literacy levels considered minimum requirement for the demands of life and work. The survey pointed out that this was not just an issue for minorities and immigrants. Thus, governments were mobilised to address adult literacy issues.

The reports give mixed messages about literacy levels in the region and there are variations in definitions of literacy. In the **EU-27+** there has been a shift from a skills-based approach to literacy towards the development of competences for processing information and generating knowledge. Communication in the mother tongue is the first of the key competences for lifelong learning identified in the European Reference Framework (European Commission 2005). In 2007, stakeholders in **Belgium (fr)** arrived at agreed nomenclature which distinguishes between literacy in French and French as a foreign language at literacy level. **Switzerland** notes that a definition is still under consideration by a task group established in 2007.

There are variations in the priority given to literacy in national agenda; in the responsibility of governments for funding literacy learning; in target groups; in the presence of explicit literacy programmes; in the profiles of providers; in the role of ICTs and in the skills and status of literacy tutors. Literacy for All is a predominant educational and political priority in **Canada** in all 13 provincial and territorial jurisdictions. The literacy needs of Canadians are addressed through various collaborative efforts between the provincial and territorial educational authorities, the federal government and the vast non-governmental sector. Literacy policy has been developed and tested through collaboration and it is frequently framed within wider social and economic development initiatives. While many of the **EU-27+** and the **USA** describe public and non-governmental initiatives to raise literacy levels, and **Serbia** and the **Former Yugoslav Republic of Macedonia** note high numbers of people without completed primary education, a number of countries indicate very few or no literacy challenges, for example, **Armenia, Cyprus, Estonia**, **Georgia, Hungary, Latvia** and **Slovakia**. However, **Romania** notes that while the "'East European syndrome of 'everybody-can-read-and-write-because-everybody-went-through-schooling' sends literacy towards the bottom of the political agenda and public interest" the private sector and civil society are exerting pressure to put literacy training on the public agenda.

Literacy learning is frequently considered non-formal learning, but it may take place as a support within formal learning, and it is provided in formal and non-formal learning locations, viz., formal ALE institutions; at work; in the home; in community settings. Interestingly, the lowest levels of the emerging qualifications frameworks in the **EU-27+** are being designed to accredit literacy and basic education learning outcomes (for example, in **Ireland** and the **United Kingdom**), thereby placing literacy within learning leading to qualifications and thus, by definition, within formal learning. A number of challenges arise in relation to literacy provision, not least the fact that adults with literacy difficulties do not necessarily recognise and/or acknowledge them and/or are frequently reluctant to seek assistance. Thus, multiple approaches are required to motivate individuals.

A legal framework for literacy provision has been established in a number of countries. In the **Former Yugoslav Republic of Macedonia,** the Law on the Education of Adults seeks to reduce the number of illiterate people and reduce the difference in male/female literacy levels. In the **USA,** the 1998 Adult Education and Family Literacy Act provides literacy services to enable adults to complete secondary education, obtain skills for employment and/or support their children's education. In recent years, a number of countries, for example, **France, Germany, Netherlands, Norway** and **Slovenia,** have focused on developing a policy framework for literacy provision. The National Agency to Combat Illiteracy, established in 2000 in **France,** maximises resources from central government, local authorities and business and industry. The programme "Integration, Reintegration and Beating Illiteracy", based on regional partnerships, supports a variety of actions, including: training of trainers; funding of resource centres; development of training paths and teaching methods adapted to adult needs. In **Slovenia,** raising the literacy levels of adults is an integral part of the National Master Plan on Adult Education and the Strategy for the Development of Slovenia 2007-2013. In 2005, the government in **Belgium (Nl)** approved a Strategic Literacy Plan which comprises 35 actions involving a wide range of partners including the training providers, and employers', employees' and welfare organisations. In **Croatia,** a national adult literacy project, *For a Literate Croatia: The Way to a Desirable*

Future; *Literacy Decade in Croatia 2003-2012*, was launched in 2003 to increase the overall literacy levels and reduce unemployment by enabling individuals aged 15+ to finish primary education and complete a training programme.

At least 25 countries, **Armenia**, **Austria**, **Belgium (fr)**, **Belgium (Nl)**, **Bulgaria**, **Canada**, **Croatia, Cyprus**, **Denmark**, **Finland**, **Greece**, **Ireland**, **Lithuania**, **Montenegro**, **Netherlands**, **Norway**, **Romania**, **Russian Federation**, **Serbia**, **Slovakia**, **Slovenia**, **Sweden**, the **Former Yugoslav Republic of Macedonia**, **Turkey**, **United Kingdom** and **USA,** note specific literacy initiatives. In 2007, **Canada** created the Office of Literacy and Essential Skills (OLES) with the objective of becoming an acknowledged "centre of expertise" to improve literacy and essential skills of adult Canadians. OLES' mandate is to play an indirect role in influencing the policies and activities of other organisations, and to leverage funding to improve opportunities for adults. OLES' activities focus on improving literacy and essential skills for the workplace, communities, and families. To achieve its mandate, OLES works in partnership with other federal departments, provinces and territories, national organisations, provincial/territorial coalitions, the industry and community groups.

In **Austria,** the Network Literacy and Basic Education project improves cooperation between providers, and supports the implementation of quality standards. Competence identification, the use of portfolios, the Alpha telephone hotline, and a web service form central elements of the project. In Sweden, literacy is integrated into basic adult education.I In **Finland,** the Noste programme offers reading and writing to adults. In **Slovenia,** the Bridge to Education programme enables individuals enrolling in formal vocational training to update or acquire basic skills. In **Belgium (Fr), Netherlands, Slovenia, Romania** and the **USA,** parents and children participate in family literacy programmes to address inter-generational learning disadvantage. Standards are evolving. In **Norway,** the Framework for Basic Skills for Adults establishes national standards for reading, writing, oracy, mathematics and ICT skills.

Workplace literacy ensures proximity, convenience, and relevance in **Belgium (Fr), Ireland, Slovenia** and **United Kingdom.** In **Finland**, from 2006, the Programme for Basic Competence enables enterprises to apply for support for training measures in reading, writing, arithmetic and the use of ICT. A similar programme operates in **Norway,** and in **Sweden,** many publicly-supported preparatory ALE activities take place at the workplace. Literacy for adults with special needs is noted by **Slovenia,** along with literacy for older, mainly retired, adults. **Armenia** identifies literacy for prisoners as a priority. In the **Russian Federation,** where the literacy levels of socially vulnerable groups are 'behind the declared one' of 99.8 per cent literacy overall, adults are entitled to upgrade their literacy levels in public evening comprehensive schools.

Gender is noted as an issue in the countries where more women than men have literacy challenges. In **Turkey** where 16 per cent of adult females are illiterate, publicly-funded ALE focuses chiefly on literacy provision, mainly for women. Early in 2008 a 'Turkey is Reading' campaign was launched along with the campaign "We, Mother and Daughter are at School for Literacy," which has a target of 3 million literate adults within 4 years. 137 000 individuals have already taken courses in the first quarter of 2009. Through the 'Support for National Education' campaign (2001 – 2007), some 1.5 million adults received literacy tuition (in addition to training in vocational skills for 4 million and training in social and cultural skills for 3.3 million). In the **Former Yugoslav Republic of Macedonia,** where participation in primary education is compulsory for adults who have not achieved that level, materials on child development were developed through a literacy project for Macedonian and Roma mothers. **Serbia** notes that while a range of mainly NGO projects address women's literacy issues, the activities are not systematic, co-ordinated or publicly-funded; and there is no strategic or legislative framework in which to embed their outcomes. **Armenia** notes that household duties make it difficult for women to engage in literacy learning.

In the context of a growing awareness of the need for specific incentivisation of minorities to participate in ALE, specifically in literacy programmes, the Roma, are most frequently mentioned by **Croatia**, **Hungary, Montenegro**, **Serbia, Slovakia** and **Slovenia**. In **Serbia,**

2007 saw the completion of a large project on basic adult education for the **Roma,** which generated proposals for changes in legislation and financing.

Appropriate literacy resources, promotion and research are critical. In **Germany,** learners were involved in the "@lpha – Innovative Approaches in Basic Education through Media-based Access" project (2001 – 2004) which developed tailored, multimedia software. **Germany** also notes the work of the Federal Literacy Association and the Alliance for Literacy and Basic Education which organise campaigns for the improvement of literacy learning opportunities. In addition, **Germany**, **Serbia, Slovenia, Canada** and the **USA** make reference to literacy research activities.

Canada has a number of inclusive databases for literacy and other adult learning resources and research. The National Adult Literacy Database (NALD) is an information network that provides access to literacy resources, newsletters, experts, organisations and associations, Internet resources, and full-text documents and books in French and in English. In 2006–07, NALD registered over nine million users on its website, who accessed over 28 million pages. Two significant online directories feature Canadian literacy research, including research in progress — the *Directory of Canadian Adult Literacy Research in English* and *Le Répertoire canadien des recherches en alphabétisation des adultes en français* (RÉCRAF), which became, as of April 2008, *COMPAS,* in a move to include research on adult education and training in general.

Vocational ALE

In the **EU-27+** VET, or continuing vocational training (CVT) is seen as having a key role in responding to the requirement for increased skills levels for the over 13 million additional jobs, many at the highest qualification level, which will be created in the EU between 2006 and 2015 (European Commission 2007d). CVT has become increasingly important for both workers and enterprises. It may be financed by enterprises, individuals and/or public authorities, and organised by enterprises themselves or networks of enterprises, social partner organisations and/or local, regional and state bodies. In some European countries where continuous upgrading of the labour force has traditionally been considered the responsibility of employer and employee organisations with relatively limited direct involvement by government, the increasing importance of CVT within a lifelong learning framework has stimulated debate about government intervention in areas that have traditionally been a private concern. In other countries, there are long-established formal tripartite systems for government-social partner co-operation for up-skilling the workforce. In the formal social partnership model,,employers provide most of the training for employees, based on agreements between social partners and national/regional authorities.

All reports note some measure of training for the unemployed as part of active labour market programmes, mainly through labour ministries. However, in some **recent EU member states, South Eastern Europe, CIS** and **Georgia,** active labour market programmes remain very much under-resourced, and, in many places, are largely devoted to the creation of public employment. In **Cyprus** and **Lithuania,** measures funded by the EU EQUAL programme have supported the reintegration of women into active economic life.

Virtually all countries in the EU-27+ operate a network – small or extensive – of publicly-funded training centres for skilling, up-skilling and re-skilling the labour force. In many countries, social partners collaborate actively in decisions about standards, curricula, methodologies, duration and qualifications. In some **recent EU member states,** and to a greater extent in **South Eastern Europe, CIS** and **Georgia**, public understanding of ALE tends to focus largely on formal vocational training, mainly IVT, located in the school system. While the majority of these countries had extensive workplace training provision under

previous systems along with workers' universities, this is now much weakened. Training activities tend to be located in schools and centres that lack resources; involvement of social partners remains weak, curricula need to be linked to the labour market, and teachers need up-skilling. Such vocational ALE as exists tends to be funded by ETF or donor-supported NGO projects. In addition, a reduction in labour market demand means that adults are sceptical about the value of vocational training. **Georgia,** for example, notes that vocational education was almost completely isolated from the labour market up to recently, and entrepreneurs and other social partners did not fully realise the importance of the vocational education for the improvement of competitiveness. However, it is anticipated that the recent establishment of vocational training centres and the reconstruction of 10 existing centres will bring changes for the better. **Israel** has a public CVT system which, it notes, is locked into the former 'industrial economy model,' while the trend in most industries is towards the 'informational economy model'. Moreover, the training language of CVT has hardly changed. In the **USA,** post-secondary vocational education for adults, the majority of whom are in employment, consists of a national system of diverse credit and non-credit face-to-face and online offerings at a variety of institutions, including 1,157 community colleges and technical colleges, business and industry associations, unions and for-profit educational institutions.
Employers are major providers of ALE in many countries in the region (OECD 2003). Enterprises may provide CVT for employees through external as well as internal courses, and employees may also learn 'on-the-job' as they carry out their work. As already indicated, in 2006 almost *three times* as much ALE took place outside, as in formal institutions, but in absolute terms, most ALE takes place in the workplace (European Commission 2007d). Nevertheless, the majority of reports indicate the need for a substantial increase in employer-led formal and/or non-formal workplace ALE. The levels of training in the EU-27 are higher in most service activities – especially in public administration, finance and insurance,, education and health – than in manufacturing. Most of the training is paid for by employers. There remain very sharp differences among EU member states in terms of levels of training. In 2005, both **Finland** and **Sweden** ranked first in terms of the amount of training received by workers at work, with 50 per cent-60 per cent of employees being reached. But at the other end of the scale are most **Southern, Central** and **Eastern EU** member states with barely 20 per cent of employees being reached, and less than 20 per cent in **Bulgaria, Portugal** and **Romania** (European Commission 2007b).

In **Denmark,** a very substantial part of overall ALE and competence development is work-related. A well-established collective bargaining process regulates the competence development of employees and human resource planning in enterprises. In **Germany,** larger enterprises often have their own internal departments that organise ALE. In **Norway,** 28 persons were appointed as "motivation agents" in 2007 to encourage local enterprises to apply for funding for workplace learning. However, **Slovakia** notes that "employers do not demonstrate sufficient interest in the education of their own employees". Enterprises in **recent EU member states**, **South Eastern Europe, CIS** and **Georgia,** are mainly micro-enterprises, many in the service business. Resources for workplace employee up-skilling are severely limited. In addition, many larger enterprises are unwilling to spend money on CVT, so the state continues to dominate the field. The main focus is school-based initial training. A recent report (Viertel and Gunny 2007) emphasises the need for more workplace learning, and all the reports from the area echo this. In the **USA,** business or industry is the single most important provider of the non-credit, job-related classes, seminars and training programmes offered nationally.

All countries make reference to commercial providers of work-related ALE, particularly in areas such as ICTs, foreign languages, business and management. In the **Russian Federation**, for example, a vast amount of ALE for increased mobility and new opportunities is provided by the market and participants pay up to 80 per cent of the costs. Such provision has led to concerns about recognition of certificates and diplomas provided by diverse training agencies.

Popular/liberal ALE

The sixth of the key competences for lifelong learning identified by the European Reference Framework is 'interpersonal, intercultural and social competences, civic competence'. This is defined as covering 'all forms of behaviour that equip individuals to participate in an effective and constructive way in social and working life, and particularly in increasingly diverse societies'. The eighth key competence is 'cultural expression', defined as covering 'appreciation of the importance of the creative expression of ideas, experiences and emotions in a range of media' (European Commission 2005a). Generally, the development of these competences lies in the non-formal ALE domain within local communities and social movements. Significantly, despite many years of region-wide debate and lobbying, non-formal ALE is not covered by explicit public policy or action priorities or funding in many countries in the region.

All social issues form the subject matter of non-formal ALE (for example, ageing, crime, environment, health, heritage, parenting and poverty), as well as cultural matters (arts; crafts; cuisine; dance; languages; literature; media; music; theatre), and political matters (community development; current affairs; democratic participation; history; international relations; law). Non-formal ALE functions as both social policy and social movement and has a range of objectives, explicit or implicit, from the promotion of active citizenship, awareness of discrimination, human rights and democracy; to personal, social and cultural development. Non-formal ALE takes place in a multiplicity of settings throughout the region, including formal education institutions but, more commonly, in a wide range of other locations including: residential and day folk high schools; study associations; popular universities; universities of the third age; centres attached to churches and chambers; trade unions; political parties; professional associations; employer associations; civil society organisations (CSOs); public and private museums and libraries; community, cultural and leisure centres; the media – the list could go on. It is widely recognised that local CSOs with campaigning and/or representative roles are well placed to reach individuals and groups at a distance from learning and, thus, in many countries they attract public funding to provide low-threshold ALE for groups at risk of social exclusion. The specifics of this spread of providers have not been comprehensively mapped in the majority of countries in the region, an omission worth noting, specially in light of the breakdown of ALE participation modes, in for example, the EU-27+.

The **Nordic** countries and **Germany** explicitly recognise the role of non-formal ALE in developing participatory citizenship and social capital, and in strengthening social inclusion and social cohesion. Thus, public funding of non-formal ALE is a social priority in a number of the Nordic countries. In **Finland**, a programme for developing liberal adult education in the period 2008–2012 has been drawn up in cooperation with key stakeholders. There is a long tradition in the **Nordic** countries and in **Slovenia** of democratic learning or popular enlightenment through large residential and day folk high schools, study associations and/or study circles. Folk high schools are also active learning settings in **Austria, Germany, Hungary** and the **Netherlands**. In S**outhern Europe,** the popular universities perform a similar role. In **Cyprus,** a comprehensive infrastructure of 300 urban and rural adult education centres provides non-formal ALE to a participant population which is 75 per cent female. In **Poland,** some 110 Universities of the Third Age with more than 25,000 participants are located in tertiary institutions, associations, cultural centres, social welfare units and nursing homes, mainly in major cities. Most classes are conducted by participants-volunteers and/or include intergenerational collaboration. **Slovenia** also has a third age university programme. In **Greece,** volunteer responses to emergencies are developed through non-formal ALE.

The **United Kingdom** has traditionally had a very extensive range of part-time "non-vocational", non-qualification-bearing adult education delivered by public and voluntary agencies. This work expanded rapidly in the late 1990s, driven by a policy to use such programmes to widen participation in education generally. However, it has since shrunk

seriously following the new policy focus on skills and social inclusion, and the transition from a managed to a market-led model of education for adults. This has produced rapid fee increases for many learners. The government has now launched the first major public consultation on how such provision might be best supported in the future, using the resources of public, private and voluntary sectors.

In many of the **recent EU member states**, **South Eastern Europe**, **CIS** and **Georgia,** the capacity of civil society to provide ALE is relatively weak, and the role of ALE in the transition to a democratic society is not always well-understood or accepted. Consequently, there is a relatively low regard and support for ALE activities.

External support for popular/liberal ALE continues to be vital in the area. Since the mid-1990s, NGOs have become one of the 'supporting pillars of ALE' in **Serbia** despite their frequently precarious legal and financial status. In 2008, there were 2020 domestic and 62 foreign NGOs, some funded by national budgets/local communities. The majority is financed by local and international donors through their participation in projects. The **Former Yugoslav Republic of Macedonia n**otes that formal ALE has 'absolute domination', while non-formal ALE is 'perceived as a rival'. In **Armenia,** more than 300 NGOs are active in ALE for the development of civil society.

Information and communication technologies (ICTs)

Training in ICTs comes within formal and non-formal ALE provision, being typically more widespread in the latter. ICT skills are now considered key basic skills and 'digital competence' is the fourth of the key competences within the European Reference Framework. ICT skills also have considerable potential for enhancing learning through enabling adults to access flexible, motivating and personalised learning programmes at a time, place and level which meet their needs. However, ALE may exacerbate the digital divide in that under-represented groups may become more firmly stuck on the down side of an increasing divide. In addition, the impact of ICTs on the social and personal dimension of ALE needs to be counteracted, especially for groups who derive particular support from interaction with their peers in ALE settings.

In virtually all the EU-27+, there are government-financed and privately-provided programmes for digital literacy for the population in general, but with specific reference to vulnerable target groups. ICTs are mentioned as a subject and as a methodology in many countries but the volume of usage is not discernible. A number of countries have put in place a national strategy for digital literacy. In **Norway,** the Digital Literacy for All strategy set the goal that by 2008 digital literacy would be integrated at all levels in education and training. National standards and a framework for basic digital competence have been developed. **Estonia** sees literacy learning mainly in terms of ICT skills. In **Portugal**, all students enrolled in formal and non-formal ALE study ICT. In **Turkey,** public education centres and the Turkish IT Association provide training for the European Computer Driving Licence. In **South Eastern Europe, CIS** and **Georgia,** commercially-provided ICT learning is among the strongest element of the ALE market. ETF has been working on a number of e-learning initiatives, viz., the report on e-learning in **Israel,** and a pilot online course in **Albania**, the **Russian Federation**, and **Serbia.**

Provision for migrants

The EU Communication on adult learning (2006) identified migrants as a key ALE target group. At Europe-wide level, since 2000, the EU Grundtvig Programme has supported learning partnerships and transnational projects focusing on learning needs of migrants and ethnic minorities throughout the EU-27+.

Publicly-financed provision for migrants is noted by many countries and is frequently non-formal. ALE integration measures for migrants include introduction programmes, language training and civic, social and cultural orientation in 15 countries: **Austria, Croatia, Cyprus, Czech Republic, Estonia, Finland, France, Germany, Greece, Hungary, Latvia, Netherlands, Norway, Poland** and **Turkey**. Targetted support to facilitate labour market integration is in place in, **Denmark, Greece, Portugal** and **Sweden**. **Austria** trained approximately 39,000 foreign nationals in 2006 through specifically tailored measures. **Finland** notes that the steering system of adult liberal education ensures a sufficient share of support for the linguistic and social integration of immigrants. In **Sweden,** 40 per cent of participants in municipal ALE in 2006 were immigrants. A trend towards compulsory participation in language and cultural awareness is emerging, for example, in **Germany** and **Norway.** In the **Netherlands,** as of 2007, all immigrants are obliged to enrol in and pay for language and civic integration training, regardless of whether they are recent or long-term residents.

In **Israel,** Hebrew language instruction for linguistic, social and vocational integration of the large immigrant population is a pressing priority. Multicultural programmes help immigrant parents understand new cultural codes and socially-defined parental roles. In the absence of a systematic response to a recent big influx of people without the Armenian language, a number of NGOs in **Armenia** have provided a limited number of Armenian language courses on their own initiative and resources. To meet the increasing demand for English language instruction in the **USA**, existing federally-funded programmes are expanding, and new ones are being established. Adult ESL services are also provided through organisations that may or may not receive federal funding, including faith-based, volunteer-based and community-based organisations, museums, libraries, private language schools, and academic institutions. Significant numbers of adult English language learners are served in programmes sponsored by large national volunteer literacy organisations such as ProLiteracy. In **Canada,** the Language Instruction for Newcomers to Canada and the Enhanced Language Training programmes provide French and English language instruction free of charge to eligible adult newcomers.

ALE for ethnic minorities is noted in a number of countries. In **Romania,** public authorities are co-operating with NGOs that work with Roma people for the delivery of the *Strategy for Improving the Roma Situation*. In **Croatia,** part of the National Programme for Roma adopted in 2003 focuses on the education of Roma. In **Croatia, Montenegro** and **Serbia,** 'second chance' schooling initiatives have proven effective in involving ethnic groups in education. In **Georgia,** the NGO sector has undertaken a project through which two adult educational centres were established to provide non-formal ALE in a multi-ethnic region. In the Nunavut Territory in **Canada,** the adult education system is based on Inuit societal values and on principles and concepts of traditional Inuit knowledge. Among these concepts are several that reinforce adult learning: development of skills through practice, effort, action; resourcefulness and innovation in seeking solutions; continuing learning and decision-making through discussion and consensus.

Adult tertiary education

The national reports provide limited information on adult tertiary education. As the education levels of populations have risen, participation at undergraduate level in tertiary education by adults as mature students has increased throughout the region. Participation at postgraduate level by adults has also increased. For example, the Danube University for CVET in **Austria**

is one of Europe's leading providers of university-based CVT. **Finland** notes that universities are major providers of ALE. Tertiary education is also a provider of non-formal ALE. For example, university extension courses disseminate the outcomes of research through non-formal ALE in **Denmark.**

In the **United Kingdom,** the Foundation Degree is a two-year full-time (or equivalent part-time) higher education course, usually incorporating a substantial element of practical work experience. In 2007 there were 2,500 Foundation Degree programmes, with a further 800 in development. Some Foundation Degrees are provided to employees by a sponsoring employer; while others are aimed at people seeking a higher education qualification in a specific vocational field. Many graduates believe that a Foundation Degree leads directly to employment in the relevant industry or firm. Foundation Degrees are also designed to provide students a vocational route from advanced entry to a full Bachelor's degree, and about half do this. Since its launch in 2001, the Foundation Degree programme has seen the number of students rise to 72,000, with a Government target of 100,000 by 2010. Two thirds of students are over 21 at entry, and a little over half are women.

Russia notes that an efficient means of developing the system of continuing education is through the creation of corporate universities that guarantee fundamental knowledge acquisition and practical activities. **Armenia** notes that higher education is going to play the most important role in the introduction of lifelong learning policy, and puts forward 'comprehensive and consecutive steps' in this regard. According to the Association of Universities and Colleges of **Canada**, there are more than 400,000 adults enrolled in the credit and non-credit continuing education courses offered at Canadian universities. Many of the continuing education courses lead to a degree or certificate. Universities are offering orientation programmes aimed at mature students who are given access to learning skills centres, flexible course schedules, and alternate learning methods, including weekend intensive workshops, workplace employee training programmes, and online and other distance programmes.

Recognition of ALE

Delegates to CONFINTEA V committed themselves to developing

> *coherent mechanisms to recognize the outcomes of learning undertaken in different contexts, and to ensure that credit is transferable within and between institutions, sectors and states*
>
> *(Agenda for the Future* Par.19 (b), p. 1*)*

ALE outcomes have an impact both at individual level (competences, employability, earnings, health, well-being) and at aggregate level, where economic dimensions (productivity, economic growth, unemployment rates, welfare payments; health costs), social dimensions (social cohesion, family functioning, social capital, lower incidence of criminality) and political dimensions (civic membership, political participation) are discernible (Hammond and Feinstein 2004; Schuller *et al* 2004; European Commission 2006b; European Commission 2007c).

Interestingly, apart from the above sub-paragraph, neither the *Hamburg Declaration* nor the *Agenda for the Future* has a great deal to say on the topic of valuing ALE in the sense of recognising, naming and certificating its outcomes. Since 1997, however, the issue of valuing ALE and making visible its benefits has become a key issue in the region as a result of a number of imperatives, viz., the need to make learning more attractive to adults through an explicit return on investment in learning in the form of certificates and diplomas which have national and international currency; the need to create and recognise the links between formal, non-formal and informal learning to promote learning in multiple settings; the need to encourage reluctant participants through recognition of their existing non-formal and informal learning independent of the learning process; and the need to enhance career mobility.

A lifelong learning paradigm values learning from a multiplicity of learning settings – formal, non-formal and informal. Qualifications recognise and reward learning, ideally wherever and however achieved; and give a visibility, market value and 'currency' to the knowledge, skills and competence achieved – both in the workplace and in terms of access to further education and training.

To maximise their impact, qualifications need to be part of a transparent qualification system. In many countries, qualification systems have, to date, been diffuse and incoherent, resulting in confusion for stakeholders, a lack of recognition for learning, difficulties in access, transfer and progression for individuals, and overall loss of value to individuals and society. Until recently, the majority of countries have had qualifications based on inputs or on the completion of a learning programme, as opposed to qualifications based on specified competence outcomes from that learning. In virtually all countries, the qualifications achieved through participation in formal 'second-chance' provision of compulsory and upper secondary education are the same as those in mainstream education. Outside of initial education and training, the lack of transparency of qualifications is an urgent issue for learners and employers in many countries in the region.

European Qualifications Framework

Qualifications that are comparable for learning and labour market mobility purposes within and between countries are a fundamental requirement to increase participation in ALE.

The European Qualifications Framework (EQF) is a meta-framework which will relate different countries' qualifications systems and frameworks, and thus support mobility. It supplements Europass, which provides a standardised portfolio to enable people to describe their skills in a transparent way; and the European Credit system for Vocational Education and Training (ECVET) which facilitates the recognition of knowledge, skills and competences gained by individuals through periods of vocational education and training abroad. The key features of EQF include: eight reference levels for qualifications which apply to all learning (general education, VET, higher education, adult education); the use of learning outcomes to identify the content of learning; a series of voluntary principles covering quality assurance and key competences; career guidance, and validation of non-formal and informal learning. The **EU-27** are expected to relate their national qualifications systems to the EQF by 2010, and by 2012 all new qualifications issued by post-secondary educational establishments will include a reference to one of the eight EQF qualification levels.

National qualifications systems

Qualification systems are being refined and transformed in many countries, and many are putting in place a range of measures to systematise qualifications. While open, flexible, and coherent systems can be developed without an overarching national qualifications framework (NQF), the majority of countries have decided to take this route. The main objectives of developing an NQF are to: establish standards for qualifications; enable comparisons of qualifications; improve learning access, transfer and progress for individuals; and improve the quality of education and training provision. A framework of qualifications has the potential to act as a powerful tool to promote transparency, co-ordination, coherence and cohesion across the entire lifelong learning spectrum. However, transforming systems that have traditionally been based on various forms of 'input control' (for example, number of students; number of qualified teaching staff; centralised and uniform curricula), to systems that are governed and funded largely on the basis of agreed learning outcomes and the quality of learning processes takes time, needs considerable human and material resources, and requires the participation of all stakeholders.

Four countries in the EU-27+, **France, Ireland, Malta** and **United Kingdom**, have national qualifications frameworks in place. Seventeen countries have committed themselves to developing an overarching NQF and are currently progressing the process by establishing working groups, drafting legislation, testing learning outcomes-based approaches, and/or building a partial qualifications framework for VET. Seven have not yet formally committed to developing a NQF but are currently examining possibilities (European Commission 2007b).

In **South Eastern Europe** and **CIS** countries and in **Georgia,** working towards a national qualifications framework is a high priority. Typical challenges include the fact that occupational classifications systems do not indicate the competence level at the various levels; the quality of provision varies widely; tests and examinations are set by schools themselves; final certificates do not specify competences gained, and learning outcomes from non-formal and informal learning are not recognised. The big challenge for all countries is to translate agreed-upon occupational profiles into learning outcomes. In 2007, the EU agreed to finance **Montenegro**'s development of a qualifications framework, for which purpose a National Commission had already been established in 2006. The **Former Yugoslav Republic of Macedonia** notes that an NQF was being piloted from 2005 to 2008. The outcomes of an ETF-led pilot project in a number of CIS countries on qualifications for

the tourism sector are ready for national dissemination. In **Armenia, Azerbaijan** and **Georgia,** where policy papers have been drafted, the ETF is continuing to support the NQF projects. **Georgia** notes that the elaboration of the NQF should be a significant stimulus for the promotion of adult education in that it will enable the recognition of non-formal and informal learning. In the **Russian Federation,** a new qualifications agency for vocational education and training has been established at the initiative of employers Debates on an NQF are continuing in 2008 (European Training Foundation 2008a).

In the **USA,** ALE programmes use a wide variety of assessments, and are administered on differing schedules 'with all the attendant drawbacks'. In recent years, particularly since the advent of the National Reporting System (NRS), education and state agencies have sought to improve assessment practices in the field with, for example, national-level regulatory procedures to determine and approve the suitability of tests for measuring educational gain.

Validation of formal and non-formal learning

Emphasis on the validation of non-formal and informal learning is not new in the region. In 1995, the European White Paper, *Teaching and Learning – Towards the Learning Society,* identified recognition of skills as a key component in the acquisition of new knowledge as it contributes to the employability of young people and workers (European Commission 1995).

Validation of formal and non-formal learning can be instrumental in motivating adults to resume/continue learning as it makes visible competences which the adult may not have been aware of, and places the individual at the appropriate level on an NQF, if one is in place. It also reduces opportunity costs by eliminating or reducing the need to spend time and money relearning what has already been learned. It may give an individual either access to a learning programme; validation for a partial qualification; or validation for a full qualification. In the EU-27, a set of common European principles provides an overarching basis for the introduction of validation of non-formal and informal learning. Since 2007, voluntary European guidelines have been providing a platform for continued European cooperation on the issue.

Validation of non-formal and informal learning, which appears to be on the agenda principally in the **EU-27** and **Norway,** has application across ALE at all levels. In many countries, entry requirements to formal 'second-chance' ALE for the acquisition of lower, upper and post-secondary qualifications are flexible, thus reducing the need to validate non-formal and informal learning to gain access to 'second-chance' provision at those levels. However, validation processes may give partial (or full) exemptions for the acquisition of qualifications at those levels, as in **Norway**. In addition, informal recognition of prior learning is usually embedded in the design and delivery of 'second-chance' ALE and decisions about putting in place learning supports such as parallel literacy, language and study skills. In general, however, the validation agenda is being driven by the vocational education and training sector as a means of raising skills levels for individuals, enterprises and society; and also as a means of facilitating access and mobility for the individual. Eight of the EU-27+ (**Belgium (Nl)**, **Denmark, Finland, France, Netherlands, Norway, Portugal** and **Slovenia)** have already reached an advanced level of implementation. Another eight countries – **Austria, Belgium (Fr), Czech Republic, Lithuania, Poland, Romania, Slovakia** and **Sweden** – are close to integrating validation of non-formal and informal learning into their qualifications systems. **Finland, France, Hungary, Norway** and **Sweden** have recognised the validation of non-formal and informal learning as an individual right. However, not all have put the necessary structures in place (European Commission 2007b).

The system of validation of non-formal and informal learning in **France** currently applies to all qualifications. Uniquely, it is a fully integrated system, making the award of a qualification independent of a particular education or training pathway or institution. In 2005, 20,000

candidates received a full qualification through validation of non-formal and informal learning, including 3,000 candidates who received a full qualification awarded by the Ministry of Employment (European Commission 2007b). The New Opportunities Initiative (2005) in **Portugal** seeks to accelerate the raising of the educational level of the labour force and to qualify 1,000,000 active workers by 2010, through the national system for recognising, validating and certifying competences, as well as through the adult education and training courses and the new modular certified training. The nationwide network of Centres for the Recognition, Validation and Certification of Competences (RVCC), established in 2000, comprised 457 centres in 2008, hosted – in public or private – by local bodies strongly rooted in their community. The civil society sector in **Denmark** has collaborated with the education ministry to develop a set of tools to support individuals in evaluating and documenting competences acquired in liberal ALE, association life, and voluntary social work. In the **Netherlands,** the Knowledge Centre for Accreditation of Prior Learning has supported providers and employers in the validation of prior learning since 2001. A. quality code agreed upon between public authorities and the sector assures the quality of the process. In **Norway,** a more targetted promotion of the system is deemed necessary because surveys show that employees in particular and the public in general know little about rights to, and possibilities of, having their competences assessed. In **Germany,** the ProfilPASS is used for recording and certifying skills, including those acquired informally. It is now being used across the country to provide evidence of acquired skills, promote personal educational prospects and draw greater public attention to informal learning.

The Canadian Institute for Recognizing Learning is dedicated to improving the ways in which knowledge and skills are recognised across **Canada**. It works with educators, workplaces, governments, and occupational groups to implement strategies like Prior Learning Assessment and Recognition (PLAR) for recognising learning, developing standards and processes for quality assurance, and facilitating the integration of immigrants. In 2006, the Institute released *Principles for Prior Learning Assessment and Recognition* as a guide to the development of criteria for PLAR in academic and workplace settings. Most public colleges recognise prior learning in at least some of their programmes. British Columbia, Quebec and Ontario also offer PLAR to adults at secondary school level, particularly for those who have not yet completed their programmes. In Ontario, the Ministry of Education provides funding to school boards which offer prior learning assessment and recognition to adult learners who are working toward a secondary school certificate or diploma. The process has two key components: the challenge process refers to the assessment of prior learning for the awarding of credit for a course developed from a provincial curriculum policy document; and equivalency involves the assessment of credentials from other educational jurisdictions.
Reports do not make specific reference to the validation of the non-formal or formal prior - learning of migrants, although the process appears to have particular potential in the case of high-skilled migrants seeking to have competences and qualifications – which they have achieved prior to immigration – recognised in the destination country. In addition, depending on the country of origin of the migrant, the EQF should prove particularly useful in this regard in the coming years. In **Canada,** the Centre for Canadian Language Benchmarks is the centre of expertise established to support the national standards in English and French for describing, measuring, and recognising the second language proficiency of adult immigrants and prospective immigrants. The Centre promotes the use of their benchmarks as practical, fair, reliable national standards of second language proficiency throughout Canada in educational, training, community, and workplace settings.

Measures to validate non-formal and informal learning face challenges in all countries – technical, cultural and political. Many countries do not have a tradition of describing qualifications in terms of learning outcomes; technical and professional support capacities are challenged at all levels; the process can be cumbersome, time-consuming and costly. Moreover, there is a need for further guidelines and methodologies. In **Slovenia,** employers claim that they are not capable of carrying out validation processes. But without their cooperation, the system cannot function effectively. The cultural challenges should not be underestimated. **Slovenia** notes that both the representatives of the formal educational

system and social partners are suspicious of the quality of qualifications achieved through validation of non-formal learning. Another concern, especially for non-formal learning itself, is the fear that the validation of non-formal and informal learning could deepen the disregard for non-award-bearing learning. There is a feeling that validation could alter the nature of non-formal learning by making it more formal, and by opening the way to having it assessed directly, either during the course or at its conclusion. Addressing these issues requires the active involvement of the education and training stakeholders, the social partners and civil society in order to create the so-called 'zone of mutual trust' (Coles and Oates 2005) between stakeholders at all levels, thus ensuring that validation systems are credible, transparent and acceptable to all.

Power relations between stakeholders play a part. **Hungary** and **Slovakia** note that the biggest obstacle is the dominance of formal qualifications and the fact that the educational and training institutions are not interested in recognising learning activities from outside their own programmes. In some countries participation in formal learning remains a prerequisite, often legal, for the acquisition of qualifications and access to the next levels of education and training. Stakeholders in formal education and training express concern that the validation of non-formal and informal learning could result in a 'lowering of standards'. Issues about 'what knowledge is valuable' and the capacity of non-formal learning 'to deliver' in this regard raise their head, explicitly or implicitly in many debates. In addition, there is a concern in the wider society about qualifications inflation and the diminution of advantage gained through formal participation, especially at tertiary level. Another challenge, particularly for ALE, is that the actual beneficiaries of validations systems appear to be those with the highest existing qualification levels (Werquin 2007). This is the "double-edged sword" effect, as validation of non-formal and informal learning operates to widen rather than narrow the gap between low-skilled and high-skilled individuals. Finally, validation processes may have mixed effects in the workplace. It may improve the mobility of employees and thus contribute to the free market rider effect, but reduce the incentive to employers to continue their involvement in the process.

Quality in ALE

Delegates to CONFINTEA V posed the following questions:

> *How can the conditions of adult learning be improved? . . . What kinds of measures and reforms should be undertaken in order to achieve greater. .. . quality?*
> (*Agenda for the Future*, Par. 16, p.13)

Since the Lisbon Agenda set the goal that education and training systems in the EU would be a world quality reference by 2010, quality has been explicitly on the EU agenda. A Common Quality Assurance Framework (CQAF) endorsed by the European Council in 2004 provided a reference framework for the development of the quality of VET at systems and provider level in the EU-27+. The intention was to improve learning outcomes and enhance the transparency of VET systems to support individual mobility. The issue of quality was given a boost by the formal establishment of the European Network on Quality in VET (ENQA-VET) in 2005, where members from the majority of the EU-27+ and representatives of European social partners exchange experience and build consensus. In 2008, EU-level discussions on quality centred on a new tool, the European Quality Assurance Reference Framework (EQARF), proposed to replace the CQAF which it is acknowledged has had 'limited impact in terms of stimulating Member States to promote its use' (European Commission 2008c). Proposed EQARF indicators align quality improvement in VET to the European objectives of increasing employability, improving the match between training supply and users' needs, and promoting better access to lifelong learning (European Commission 2008c). The draft indicators are considered equally applicable to IVET and CVT and include training needs identification, relevance, investment, access, prevalence and success rate of vulnerable groups, completion, placement and utilisation of acquired skills in the workplace.

The 2006 EU Communication (European Commission 2006a) on adult learning emphasised that improving the delivery of adult learning is essential to raising participation and ensuring quality learning outcomes. It urged the EU-27 to address the inter-related challenges of ensuring quality and striving to reform governance and expand provision. While acknowledging that quality in ALE depends on many inter-connected factors, the Communication concentrated particularly on the quality of providers, of staff and of delivery. Member States were urged to introduce quality assurance (QA) mechanisms, invest in teaching methods and materials adapted to the needs of adults, make learning outcomes explicit, up-skill staff and provide the learning supports necessary to engage the adults least likely to participate in structured learning.

Public authorities play a crucial role in the governance of ALE for accountability at systems and provider levels through establishing regulatory frameworks, setting quality standards, certifying adherence to these standards, and making information on provider performance against explicit indicators available to service users. In general, public authorities are more interested in the quality of provision when public funding is involved, but they also have a role to play – in the interests of effectiveness and consumer rights – where ALE is privately provided, often with multi-source funding. Not surprisingly, not all aspects of ALE are subject to the same regulation. The public quality focus in ALE in the EU-27 is primarily on 'second-chance' ALE provision, general or, more commonly, vocational, adult IVT and CVT provision within training institutions. Quality concerns appear to have more limited implications for CVT within the workplace, which is generally beyond the quality assurance reach of public authorities. Much of the impetus for quality assurance in VET comes from increasing decentralisation and growing managerial autonomy of education and training institutions. Devolved financing and authority creates the need for national/regional authorities to monitor investment against national goals and targets within an overall emphasis on effectiveness and efficiency at EU

level. In the majority of countries, external accountability issues are also coming to the fore for providers of non-formal ALE in receipt of public funding. Depending on their historical, legal and fiscal status, procedures vary enormously from country to country – as does ambivalence on the part of independent bodies about external accountability criteria (Bélanger and Bochynek 2000).

Quality Assurance mechanisms

The description of QA in the reports concentrates mainly on overall systems and approaches with limited discussion, if any, of indicators or measures of effectiveness. Nor are the values underlying QA approaches addressed by any country, apart from **Germany** and **Slovenia** which both note that the learner is at the centre of their QA processes. In general, systems are at different stages of development in the region. The **Nordic** countries**, Austria, Germany, Ireland** and the **United Kingdom** established advanced quality assurance systems and independent evaluation bodies several years ago. The **United Kingdom** has "seen the quality of provision increase massively as, simultaneously, we have delivered more intensive programmes to address economic and social needs". In addition, the **United Kingdom** developed very rigorous national quality QA systems during the early years of QA, aimed at making major improvements in quality. As institutions have demonstrated their capability to manage quality, responsibility for QA is now being progressively devolved. In contrast, the **Czech Republic, Romania** and **Slovenia,** are only just introducing QA systems, indicators and quality management tools for VET institutions. In the majority of countries where ALE provision is located in mainstream schools, all school system QA procedures are also applicable to ALE provision, including inspection, external examinations and external evaluation. A number of the EU-27 underline the role of the ESF in promoting a 'culture of evaluation' of VET and CVT provision. The reports note the following systems-level QA approaches for formal ALE and, to a much lesser extent, non-formal ALE:

National or regional governmental bodies with a remit, specific or part of wider responsibilities, to monitor and/or evaluate education, including ALE, are becoming more common and exist in at least 14 countries: **Denmark, Estonia, Finland, Hungary, Germany, Georgia, Greece, Ireland, Norway**, **Poland, Portugal, Romania, Slovenia, Sweden,** and the **Former Yugoslav Republic of Macedonia**. In **Sweden,** a Commission of Inquiry made a nationwide evaluation of liberal adult education (study associations and folk high schools) in 2002-2004. **Georgia** established the National Educational Accreditation Centre (NEAC) in 2006. The **Former Yugoslav Republic of Macedonia** notes that the Macedonian Evaluation Agency has some way to go to meet the European standards prescribed for QA agencies.

Indicators and Benchmarks that mirror Education and Training 2010 indicators and benchmarks (which apply in the EU-27) and the CQAF exist in a number of countries. In the **United Kingdom**, Public Service Agreements define the government's high-level priorities. They set out the specific improvements that the government wants to achieve across all government departments, and the performance indicators which will be used to measure progress. Eleven of the 30 Public Service Agreements have implications for ALE, directly or indirectly.

An expert institute/body to assist pro*viders through developing t*eaching resources and/or the up-skilling staff exists in 13 countries: **Austria**, **Croatia**, **Finland, France, Germany, Greece, Hungary, Montenegro, Norway, Romania, Russia, Slovenia** and the **USA**. **Serbia** notes that although some ALE-applicable instruments are being developed by the Institute for the Improvement of Education and the Institute for Education Quality and Evaluation, ALE is still looking for 'a real place' in both.

Quality control measures such as the accreditation *of providers,* accreditation of programmes, inspection and external evaluation focus on the compliance of providers. Through accreditation public authorities seek to legitimise and quality-assure a range of diverse providers by requiring them to meet a set of minimum standards for recognition and, where applicable, the receipt of public funding. Such systems are in place in 15 countries: **Austria, Bulgaria, France, Estonia, Germany, Greece, Hungary, Ireland, Latvia, Lithuania, Poland, Slovakia, Slovenia, Romania** and the **United Kingdom.** In **Estonia,** the government issues a licence to providers of vocational and non-formal ALE. In **Latvia,** in 2003, the Latvian Adult Education Association, in cooperation with the local and regional government association and the education ministry, developed recommendations on licensing non-formal ALE programmes. Significantly, the 2007 EU Action Plan on adult learning (European Commission 2007a) proposed research on the development of quality standards for providers and the accreditation of providers.

Quality labels and/or quality standards that must be achieved to receive public funding include the LQW® which places the learner at the centre of the quality process in some 600 institutions in **Germany**; GretaPlus which guarantees individualised services to learners in **France**; INSI-QUEB, EQFM and ISO in **Austria,** and EduQUa in **Switzerland**. In **Norway,** the KVASS project (2004-2005) produced a set of common standards of quality in ALE.

Quality assurance frameworks are in use in **Austria, Germany, Greece, Hungary, Ireland** and **Romania**. **Georgia** notes that a quality assurance system for teaching and curricula is in the initial stage of development in some VET centres.

Monitoring of inputs and outputs by expert bodies/annual reporting requirement is noted by **Germany, Slovenia, Spain** and the **USA**.

Provider-level QA systems where providers are either obliged or choose to assure the quality of their processes, practices and outputs are in place in many countries. Good governance at provider level is characterised by an overall focus on the adult learner with effective needs analysis; efficient administrative systems; appropriate allocation of resources; innovative teaching/learning approaches; professional staffing; strong evidence-based monitoring and evaluation within national frameworks; and close relations with bodies such as learners' organisations and social partners (European Commission 2007a). Provider approaches to quality noted in the reports include: self-evaluation; meeting provider accreditation requirements and achieving quality labels. In **Finland,** under the Act on Liberal Adult Education, providers are obliged to carry out regular self-evaluation and participate in external evaluation.

Staff qualifications and skills

The last decade has seen an increasing role-change for those who work in ALE, including management, programme developers, guidance personnel, mentors and administrative personnel; as well as teachers, tutors and trainers. Increasingly, even in formal ALE, teachers are facilitators of learning rather than expert imparters of knowledge and skills in the traditional sense. The EU Communication (European Commission 2006a) emphasised that the professional development of personnel is a vital determinant of the quality of adult learning.

Adult educators need both subject-content and pedagogical competences. The former is generally present, but there are few formal requirements for the latter. Outside of 'second-chance' general and vocational ALE in mainstream schools and other public institutions

where staff are frequently required to hold the same qualifications as school education staff, there are many educational and professional routes to becoming an ALE teacher. The majority of countries have paid little attention to defining the content and processes for initial training for ALE personnel, and even less so in the case of non-formal ALE staff. This arises from the characteristics of the ALE sector in many countries. Staff may enter ALE later in their professional lives, may come and go, may have short-term contracts, or take on ALE as a second job. Therefore, focusing on initial training is not a priority in many countries. Instead, short courses, induction programmes and work learning arrangements are deemed more appropriate. This situation creates the need for a flexible system of teacher education enabling people to move in and out and to make choices regarding content, modes of provision and schedules (Research voor Beleid and PLATO 2008).

On the European and national levels, there is no clear view on standard competences or skills needed to fulfil professional tasks in ALE, partly due the diversity of the field. Generally, the occupation of teacher or trainer of adults is not a regulated profession and standards of qualifications and competence are just emerging. They vary enormously from country to country, and they frequently apply to vocational ALE only. **France** has developed a competence profile with a focus on vocational ALE. In Romania, the Sectoral Committee for Education and Training validated and updated an occupational standard for 'trainers' in 2006, and now wish to extend it to all categories of trainers with a common framework, and to develop the higher education programmes in the area of ALE. In **Lithuania,** the draft Lifelong Learning Strategy (2008) seeks to regulate legally the profession of an adult educator and to create the conditions for development of relevant competencies in educational establishments of various types. The **United Kingdom** notes the introduction of more formal qualification requirements for teachers in all phases of post-school education in the 11 years since CONFINTEA V. Competence profiles also exist in **Denmark, Germany, Poland, Portugal** and **Sweden** (Bechtel 2007; Nuissl 2008).

In **Finland,** the Act on Liberal Adult Education lays down specific requirements in relation to the skill sets of teachers in non-formal ALE. In **Israel**, facilitators who are specially trained as adult educators require certification from the education ministry to practise. **Estonia**, which has a new professional qualification standard based on the adult educator's competences, and **Serbia,** are among the few countries in the region where being an adult educator is considered a specific profession. On the other hand, **Germany** notes that, due to the fact that central features of a profession such as a clear occupational profile, rules on access and the required qualifications are non-existent in the country, there is a move away at a sociological level from the idea of 'profiling' and 'profession' to the idea of 'professionalisation' in the context of quality development, a move which is characterised as the development of 'professionalism' in ALE. In **South Eastern Europe** and **CIS** countries and in **Georgia,** ALE teacher training needs close attention but mounting pressure from the labour market has resulted in the prioritisation of curriculum content rather than teaching methodology reform. In 2002 ETF established the VET Teacher and Trainer Network (VET TT Network) to support a sharing of innovation and good practice by a 'community of practitioners' in **South Eastern Europe** (European Training Foundation 2008c)**.** In **Montenegro,** where there is a shortage of trained staff and no organised system for training of staff, andragogic training is one of the priority goals for the coming period.

Not surprisingly, the prevalence and status of adult education as a subject in higher education is patchy throughout the region. **Norway**, for example, declares that 'adult education has a low profile as an academic field', and **Israel** notes that adult education is not a subject in any university in the country. However, undergraduate courses do exist in at least 20 countries, including **Austria, Armenia, Canada, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Latvia, Lithuania, Norway, Portugal, Romania, Serbia, Slovakia, Slovenia** and **Switzerland.** However**, Armenia** notes that nobody is interested in the course because of the low status of ALE in that country. Conversely, **Finland** notes the existence of a professorship of adult education in seven universities and the emergence of a new course in social pedagogy concerned with

non-formal and informal ALE. **Serbia** has a long and distinguished history of teacher training in ALE, with a four-year undergraduate course in andragogy, along with master's and doctoral programmes. There are more courses at postgraduate level and, in this context, eight universities in seven countries are providing a European Master in Adult Education.

In the majority of countries, the status, conditions of employment and remuneration of ALE staff generally fall below those of staff in other education and training sectors. Apart from **Finland** and a few others, countries do not have adequate information on numbers employed in ALE, and data on staff qualifications are far from complete in the majority of countries. Full-time employees are outnumbered by part-time employees who have few career prospects and who are frequently paid by the hour or are working as volunteers. Teachers of adults in formal ALE may also be teachers of young people and may have other non-related occupations, especially when they work in evening and weekend adult-specific provision. In **Portugal,** the staffing requirements, qualifications, recruitment procedures and remuneration of the RVCC centres are clearly set out, along with the CPD arrangements for staff. In **Turkey,** public institutions providing ALE programmes recruit staff according to the results of the selection examination for professional posts in public organisations, with salaries are set by government.

Continuing professional development (CPD) for ALE personnel is more prevalent than specific initial professional development, but it nevertheless remains patchy and *ad hoc* in many countries, with a wide range of bodies providing the service. The extent of specific CPD to develop or improve skills to teach adults is generally dependent on the employer. All the larger providers of adult education in the majority of countries make courses on teaching methods or related subjects available to their teaching staff. These courses are frequently provided by higher education institutions. In general, very little information is provided on the CPD – or indeed, on the IPD – of personnel in non-formal ALE. To a greater extent than in formal ALE, teachers in non-formal ALE are from a wide range of backgrounds and there are few requirements for teaching or training qualifications. However, the large non-governmental providers with a specific remit for education and training where many of the teachers will be higher education graduates, and which are in receipt of public funding, will provide regular CPD in teaching adults and other issues for their staff. In smaller NGOs, staff are likely to work on a part-time basis and to have another occupation outside of education. The issue of teacher qualifications is, however, increasingly likely to arise in the context of quality assurance if the organisation is in receipt of public funding.

In **Slovenia,** the right and obligation for in-service training (INSET) is determined by law. The Slovenian Institute for Adult Education is the main provider of INSET courses for ALE personnel. In **Portugal,** a specialised training programme addressing the pedagogical teams of the New Opportunities Centres is developed at national and regional level on an annual basis. In 2008 a group of public universities developed this training. In **France,** the Academic Centres for Continuing Professional Development provide CPD for ALE personnel and also contribute to the development of training resources In 2007 **Austria** established an institution to make a substantial contribution to the professionalisation and quality assurance of ALE personnel. In **Sweden,** a CPD initiative to boost the teaching of Swedish to immigrants was introduced in 2008. **Germany** notes that CPD for administrative staff is growing in importance as their role evolves. In **Croatia,** the Croatian Andragogy Society (CAS), a professional association founded in 1998, supports the CPD of ALE staff. CAS focuses on improving the theory and practice of both formal and non-formal adult education; providing training opportunities for its members; encouraging research in the field of ALE and encouraging cooperation among ALE stakeholders.

A number of the EU-27 have put in place work-based in-service routes to gaining academic and professional ALE qualifications. Within the **EU-27+**, the mobility actions/CPD elements of the Lifelong Learning Programme seek to contribute to the up-skilling of ALE teachers through supporting the participation of personnel in European study visits, training courses and work experience. In addition, the Training of Trainers Network – TTnet – is a network of

national networks set up by Cedefop in 1998 as a forum for key players and decision-makers in the training and professional development of VET staff.

In **Serbia,** professional development for adult educators and facilitators takes place in the non-formal education sector, resulting in a network of well-trained adult educators. Similarly, in **Armenia,** although there is no government involvement, there are many adult educators as a result of activities of national and international NGOs. The Adult Education and Lifelong Learning Association has collaborated with national and external experts in the development of a CPD programme. In **Israel**, a system of on-going in-service training operates to support the CPD of adult educators. In the **USA,** state authorities are required to monitor instructional practices in the context of federal funds and the federal government oversees national dissemination of the STAR project's "toolkit," which translates research findings into usable classroom strategies.

In the context of the overall quality of ALE, it is significant for the **EU-27+** that as part of the implementation of the Action Plan on adult learning (European Commission 2007a), the European Commission is developing standards for adult learning professionals, including guidance services in 2009. In 2010, research on the development of quality standards for providers and the accreditation of providers will be carried out.

Research on ALE

The majority of the national reports describe ALE research carried out in the last five years. The broad research headings include:

- the role of ALE and lifelong learning
- policy development and the role of stakeholders
- financing
- management
- participation, guidance and target groups
- learning provisions (key competences, ALE for citizenship, work-related ALE)
- qualifications and validation of non-formal and informal learning
- quality including monitoring and evaluation and staff development
- evaluation studies
- general studies – historical and descriptive

Details by topic and by country are included in Appendix 4.

Many of the EU-27+ make reference to research done through participation in the Grundtvig and Leonardo da Vinci actions of the EU Lifelong Learning Programme 2007-2013 and its predecessor programmes. Many countries also refer to participation in, or use of, OECD research including the International Adult Literacy Survey (OECD 1995; 1997a; 2000; OECD and Statistics Canada 2000); the Adult Literacy and Skills Survey (OECD and Statistics Canada 2005); and the forthcoming PIAAC, Programme for the International Assessment of Adult Competencies (OECD 2008).

While the majority of countries indicate that research findings specifically commissioned by national authorities or generated by international organisations do contribute to evidence-based policy-making, the general tendency is that research produced by academic institutions and individual researchers does not have the same impact. In addition, while the specific topics addressed in individual countries reflect the concerns of the stage of development of ALE and the context in which it is operating, the scope of the research undertaken reveals a limited focus in all areas, particularly financing; learning outcomes; qualifications; quality and the social and economic impact of learning. Moreover, the overall volume of research is limited. For example, **Montenegro** indicates that the country has no analytical research on ALE due to lack of institutions addressing the topic and because of lack of available funding. Finally, there is an apparent lack of a systematic approach within countries. In this context, it is noteworthy that the Austrian Research and Development Network for Adult Education and CET, based on a joint initiative by the Austrian Institute for Research on Vocational Training with the Danube University Krems/Platform CET Research and the Austrian Institute for Adult Learning, has been established in **Austria**. The Network aims to serve as a platform for networking by stakeholders, for the establishment of a coherent strategy, and for the strengthening of research and development. The **United Kingdom** notes a major expansion of research into adult learning, especially through the independent research councils, and through specialised research centres funded by government. It also notes major improvements in the quality and quantity of routine data collection about adult learners in all sectors and phases.

In **Canada**, COMPAS is the research directory produced and updated by the Research Centre on Adult Education and the Status of Women, with assistance from an advisory committee of 14 researchers and practitioners from across Canada. It is an exhaustive list of reports and research in the areas of education, training, and literacy in francophone Canada, and is published on the Internet. The goal of COMPAS is to promote research and knowledge-exchange among researchers and practitioners. The COMPAS website provides access to current research, activities, up-to-date information, events, links to documents and

specialised journals, organisations, institutes and research centres at national and international levels. It also gives access to a forum for virtual exchanges about issues in the field.

The 2006 Communication on adult learning (European Commission 2006a) points to the fact that failure to demonstrate the benefits of adult learning is a major weakness of the field and the recent progress report on *Education and Training 2010* (European Commission 2007b) underscores the need for more research in the **EU-27** to improve the knowledge base for evidence-based policy-making in education, including ALE.

Over the years, the European Commission itself has supported research on a range of ALE topics, the majority on vocational education and training, through CEDEFOP. CEDEFOP outputs include studies on validation of non-formal and informal learning, qualifications systems and quality in VET. Commission-funded research on general ALE includes: *Adult Education Trends and Issues in Europe* (EAEA 2006); *Study on Adult Education Providers* (NIACE 2006); *Non-Vocational Adult Education* (Eurydice 2007); *ALPINE – Adult Learning Professions in Europe, A study of the current situation, trends and issues* (Research voor Beleid and PLATO 2008).

Since 1991 European researchers specialising in ALE have been using the European Society for Research on the Education of Adults (ESREA) as a platform for exchanging information, research methods and results. In addition, the association of European Research and Development Institutes for Adult Education (ERDI) brings together research institutes from all over Europe that focus on ALE as a research topic.

Research challenges in ALE have been widely documented (ERDI 2004; EAEA 2006). These include:

- The relative invisibility of ALE in local, regional, national and international research.
- The lack of ALE research infrastructure and funding in many countries.
- The general lack of a culture of evidence-based ALE policy-making in many countries. The research programme accompanying the Noste programme in **Finland** is an example of good practice in this regard.
- The generally low impact of research, where it actually exists, in decision-making and the consequent need to build national and region-wide knowledge bases to make better use of research.
- The comparability and applicability of research beyond national/regional boundaries.

Conclusion

Within the UNESCO region of Europe, North America and Israel, lifelong learning, including ALE, is considered a key response to economic, social, environmental and other challenges being faced by the majority of countries. It is clear from the review of the national reports that the general objectives and overall direction of ALE policies in the countries display broad similarities, while substantial differences may be observed in immediate priorities and in approaches, methods and instruments by which objectives are being pursued. Because ALE policies and practices are essentially national, a wide range of factors contribute to the condition of ALE in any country, including:

- the prevailing socio-political culture comprising beliefs and values about the role of the state in general and in relation to education and training in particular;
- prevailing views on the function of education and training – in this, case ALE – in relation to the social, cultural, political and economic goals and priorities of a country;
- the dominant views on the optimal balance of power, roles and activity between the three major social institutions of state, market, and civil society;
- the systems of ALE governance in operation, including the role of the social partners;
- the level of economic development; and
- the level of investment in education and training.

Across the region ALE exists along a spectrum of development. At one end of the spectrum, a relatively small number of countries are adopting a systemic approach to ALE, formal and non-formal, whereby it is an integral autonomous sector within the overall education and training system, and is embedded in the wider social, economic, cultural and political domains. Thus, enabling legislation; policies; structures; financing; flexible learning provision and support; learner-centred qualifications systems; initial and continuing professional development of personnel; and overall monitoring and evaluation are established for the primary, secondary and tertiary education sectors within an overall lifelong learning framework. The policy development and provision cultures are underpinned by strong tripartite arrangements that sustain the formal, active involvement of social partners. Relative to other regions, ALE participation rates are high and the gap in participation rates between the adults most likely and least likely to participate in ALE is smaller than in other regions. At this end of the spectrum, adults' literacy levels are relatively high and those with low levels of education may have a statutory right to achieve upper and post-secondary qualifications in a publicly-supported network of dedicated institutions. They may also have a statutory right to validation of their non-formal and informal learning for access, exemption or gaining a part- or a full qualification.

ALE is considered a 'public good' and a public responsibility, and is part of redistributive and equality measures within a public service rationale; a systematic, agreed-upon, and regulated practice within the workplace; and a collective project in civil society, contributing to consensus building, social cohesion and the maintenance of democratic institutions. The intrinsic value of non-formal ALE is explicitly recognised by the state as a collective as well as an individual project for building bridges between culturally diverse people and leading to enhanced social capital. Non-formal provision tends to be supply-based within a well-developed infrastructure of public and non-public institutions. Popular associations and organisations receive public funding while retaining their independence regarding learning content and organisation, subject to being accountable for public funding.

Concerns with quality and with monitoring and evaluation are translated into policies, structures and measures. The result is a largely integrated, relatively seamless provision of ALE which functions effectively in relation to societal goals and objectives – social, cultural and economic – and is attractive to adults. Significantly, where applicable, these countries tend to score highly on all the benchmarking criteria of the EU's *Education and Training 2010*

programme. Nevertheless all are striving to increase the quantity and quality of ALE in all its dimensions.

At the other end of the spectrum are the countries where, for reasons of ideology, stage of development and/or resources, ALE provision is limited and, quite commonly, market-led. The legislative basis, policies, and financial support are disjointed, weak or absent; and structures are fragmented. Such ALE policy as there may be is frequently indistinguishable from labour market policy. The systematic involvement of the social partners is non-existent or emergent. Provision is school-bound, curricula need updating, personnel are in need of CPD and links to the labour market are limited. Documented ALE participation rates are low. The gap in participation rates between the adults most likely and least likely to participate in ALE is high. There is under-investment due to market failure, especially for people in all the typical under-represented groups and public authorities either will not or cannot take compensatory action. ALE may be dependent on the private for-profit sector and on civil society and, ultimately, dependent on individual demand. There is limited or no explicit public commitment to the role of non-formal ALE in the maintenance and/or creation of democratic institutions and social cohesion and there is restricted capacity on the part of a fragmented civil society to engage with ALE. CSOs depend on limited multi-source funding from a wide range of national and international private, philanthropic and demand-side sources with limited or, frequently, no public funding.

Access to such publicly-supported provision as may exist may be limited by eligibility criteria focused on young early school-leavers. Provision is likely to be based on a schooling model and have limited relevance to the needs of the labour market. Some literacy learning may be supported for ethnic minorities and other groups. Monitoring and evaluation are sporadic and, where they exist, may not necessarily inform evidence-based policy-making. Many countries at this end of the spectrum stress how historical legacies and financial constraints rather than ideological stances are limiting their capacity to support ALE and the majority are seeking to increase the quantity of ALE.

In between the two ends of the spectrum, ALE in the majority of countries in the region is located along the continuum of development on the key dimensions of policy, governance, legislation, financing, infrastructure, participation, provision, recognition of learning and quality assurance. In these countries, the broad politico-educational drive is towards the rationalisation of provision with a thrust towards increasing co-ordination, quantity and accountability.

In general, these ‘intra-spectrum’ countries are legislating for adult learning specifically, or as part of a wide range of educational and other legislation. To address fragmentation at vertical and horizontal levels, decentralisation and co-ordination at national and/or regional ministry level are two main governance approaches being adopted. Social partner involvement tends to be state-co-ordinated or voluntary in nature. National and local partnerships of multiple stakeholders exist, are emerging or are being aspired to, but apart from national representative associations of non-formal ALE providers, the growing co-ordination and coherence agenda does not necessarily extend to non-formal ALE. A critical challenge in all countries is policy implementation to achieve real development of ALE. A key concern for adult educators in ‘intra-spectrum’ countries in the region is that fact that although ALE policies espouse the twin goals of economic development and social inclusion, the practice in the majority of countries is primarily driven by the economic rationale for ‘more and better jobs’ to the detriment of the broad humanistic endeavour that is education, and had been adult education to a large extent before it became so firmly hitched to the economic wagon.

Many countries are striving to achieve a balancing act in terms of who pays, why, for what and for whom. Data are incomplete but it is clear from the national information that public commitment to, and investment in, ALE varies between countries, depending on ideology, governance and resources. The majority finance ‘second-chance’ provision, including literacy learning and up-skilling for the unemployed through a range of centralised and decentralised

channels. To incentivise individuals to invest in their own learning, there has been a growth in demand-led schemes funded by public authorities, by social partners or by mixed funding, which channel funding directly to the learner rather than to the provider, mainly for vocational training. In most countries, no precise documentation of public investment in non-formal ALE is available. Multi-source funding from a wide range of statutory, non-statutory, private, philanthropic and demand-side sources is the norm in non-formal ALE. Levels of financial support vary considerably and participation in non-formal ALE tends, on the whole, to be self-financing except in the case of socially and economically disadvantaged individuals. The relative absence of demand-side schemes for non-formal ALE for purposes other than work, is a sticking point for many adult educators in the region who maintain that financing civil society for the development of social capital is as important,, ,if not more important as, financing human capital development.

The need to increase participation in ALE remains a major challenge in these countries. The reality in all countries is that the largest volume of adult learning takes place outside formal provision, as non-formal and informal learning. Thus, ALE is actually more AL (adult learning) than institutionalised AE (adult education). The majority of countries are targetting under-represented adults, and in many countries, public authorities support non-formal ALE due to its capacity to reach particular 'at risk' individuals. In an effort to respond to time and other pressures that hinder participation, the organisation of learning is receiving attention at institutional level. Flexibility is a key organisational principle with countries reporting personalised 'tailor-made' courses; independent learning opportunities, a more symmetrical pedagogy; flexible location and scheduling of learning opportunities, and the provision of appropriate learning supports. Many countries are putting in place resources for guidance to promote re-engagement with learning, course completion, and a successful transition to sustainable employment.

Publicly-supported measures to enable adults to gain compulsory and upper secondary education and training qualifications exist in virtually all 'intra-spectrum' countries. Adults have a statutory right to achieve secondary education qualifications in a limited number of countries. Literacy learning is frequently considered non-formal ALE but it may occur as a support within formal ALE. In recent years, some countries have focused on developing a framework for the development of literacy provision, including legislation, infrastructure and action plans. A number of countries indicate that their adult literacy levels do not warrant any specific interventions. Employers are the main providers of continuing vocational training while adult initial vocational training is generally provided by the state, frequently for unemployed adults as part of active labour market programmes. All the social, cultural and political issues form the subject matter of non-formal ALE. Training in ICT, as digital competence and as a subject in its own right, comes within formal and non-formal ALE provision, but tends to be more widespread in the latter. Provision of language and cultural learning for immigrants and/or mainly basic education for ethnic minorities exists in virtually all countries.

However, in many countries across the entire spectrum of ALE provision, there is a growing blurring of distinction between ALE for personal development and ALE for employment, as learning for key competences becomes more rooted in the workplace, as learning for more vocational purposes begins to be taken on by community-based providers, and as validation of non-formal and informal learning for a range of job-related and other reasons becomes more commonplace.

Supra-national and national objectives of building a lifelong learning society are creating a strong demand for more coherent and flexible qualifications systems**.** Throughout Europe the European Qualifications Framework (EQF) is steering and stimulating developments, and governments are responding with the development of national and/or regional qualifications frameworks. There is a growing movement for validation of learning outcomes independent of when, where or how they have been achieved. In general, the validation agenda is being driven by the vocational education and training sector as a means of raising skills levels for

individuals, enterprises and society. There is concern in the non-formal ALE sector that validation could lead, eventually, to the application of accreditation systems directly in non-formal learning, and to a further loss of regard for learning that does not bear awards. Besides, it is emerging that, once more, measures to promote a more equitable distribution of education and the benefits thereof are being tapped most by those with already relatively good education levels. In addition, moves towards the validation of non-formal and informal learning are generating fairly formidable challenges – technical, cultural and political – in many countries.

Enhancing the effectiveness of education and training through improving quality standards is a major theme in many countries. Where ALE is delivered in mainstream schools or higher education, the quality assurance measures in place in those institutions apply. Public quality concerns have more limited implications for CVT within the workplace. The reports note a range of systems-level quality assurance approaches for formal ALE and, to a much lesser extent, non-formal ALE. However, many countries have not developed adequate national performance indicators or put in place arrangements to collect necessary data, resulting in difficulties of measuring the overall quality and impact of ALE actions.

The professional development of staff is a critical component of quality assurance in ALE. In general, little attention has been paid to defining the content and processes of initial training for formal ALE personnel and even less so for personnel in non-formal ALE. Continuing professional development (CPD) is more prevalent than specific initial professional development (IPD), but it remains patchy and *ad hoc*. The main emphasis on adult education as a discipline in higher education is at postgraduate level as an academic discipline and/or as continuing professional development. While in the majority of countries there is no clear view on the standard competences or skills needed to fulfil the professional tasks in ALE, partly due the diversity of the field, a small number of countries have developed competence profiles for ALE personnel. But other countries are moving away from the idea of ‘profiling’ and ‘profession’ to the idea of ‘professionalisation’, and the development of ‘professionalism’ in ALE. The European Commission will develop standards for adult learning professionals in 2009.

The volume and scope of ALE research is limited in all countries in the region and there is a critical need for a research infrastructure and a research interface to increase the amount, quality and impact of ALE research..

Recommendations

ALE in the UNESCO region of Europe, North America and Israel faces challenges across all the key dimensions of policy, legislation, governance, financing, participation, provision, recognition, quality and research. Accordingly, with a view to increasing the quantity and quality of ALE in the region, the following recommendations in relation to ALE are made to UNESCO Member States in the region, and to the participants in the preparatory regional meeting in Budapest.

The place of ALE within a lifelong learning framework and within lifelong learning strategies should be strengthened. Stronger support should be given to ALE as a key element in the promotion of economic development and social cohesion. The implications of a tendency towards a paradigmatic shift from adult education and training to adult learning should be monitored to counterbalance any disadvantages arising for adults.

There should be greater focus on the development of coherent policy for ALE, and a much sharper focus than heretofore on policy implementation. The interface between all relevant policies should be improved.

While the legislation required to promote and support ALE should be introduced, it should be borne in mind that legislation alone will not lead to a robust provision of ALE.

Governance issues should be addressed with a view to creating the local, regional and national frameworks, structures and partnerships required for the development, co-ordination, funding, provision, quality management and monitoring of ALE. The involvement of civil society in governance should particularly be promoted and supported.

Key stakeholders, especially public authorities and employers, should increase funding of ALE in formal, non-formal and informal settings for civic, social and political as well as economic goals. In addition, regulatory and institutional arrangements conducive to enhancing investments by lower levels of government, by enterprises, by civil society and by individuals should be put in place. Setting benchmarks to monitor progress will be vital.

The necessary steps to increase the volume of ALE should be taken and a more equitable distribution of ALE should be promoted and supported through concrete measures to address barriers and to incentivise participation, especially for the adults least likely to participate because of initial education and training levels, labour market status, geographical location, age, gender and/or ethnicity.

Publicly-supported ALE should be provided for through the maintenance of a public or publicly-supported network of local, flexible adult learning settings as part of institutionalised public services to ensure social cohesion, economic development and equal opportunities at national, regional and local levels.

All the elements of ALE provision – 'second-chance' provision for the achievement of secondary or post-secondary qualifications, vocational education and training, liberal adult education and adult tertiary education – should be developed and supported by the key stakeholders. Increased coherence and interplay between formal, non-formal and informal learning systems and settings should be promoted and supported.

A focus on key competences across all ALE provision should be promoted and supported and priority should be given to the development of adult-centred policies and practices.
Lifelong guidance systems should be developed and maintained as part of effective learning supports to underpin access, transfer and progression within ALE.

The recognition of learning wherever, whenever, and however achieved within an overall coherent qualifications system should be accelerated, including the validation of non-formal and informal learning outcome in order to add value to learning, and to stimulate participation and progression. The implications of validation for non-formal and informal learning should be monitored.

The acceleration of the development of policies, structures and measures to address quality issues and ensure quality outcomes is vital, including the development of competence profiles for ALE personnel, and a systematic approach to the initial and continuing professional development of ALE personnel to facilitate the 'professionalisation' of ALE provision.

Agreed-upon, comprehensive data systems should be put in place to create baseline data, establish benchmarks, monitor progress, evaluate performance and increase the overall visibility of ALE.

To promote ALE research production, dissemination and application, there is a clear need for the development of a research infrastructure and robust mechanisms for the production and dissemination of research and, critically, for a research interface to promote the use of research results in policy development, implementation, monitoring and evaluation.

Appendices

Appendix 1

Member States of the UNESCO Region of Europe, North America and Israel

Albania
Andorra
Armenia
Azerbaijan
Belarus
Belgium
Bosnia and Herzegovina
Bulgaria
Canada
Croatia
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Georgia
Germany
Greece
Hungary
Iceland
Ireland
Israel
Italy
Kazakhstan
Latvia
Lithuania
Luxembourg
Malta
Monaco
Montenegro
Netherlands
Norway
Poland
Portugal
Republic of Moldova
Romania
Russian Federation
San Marino
Serbia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Tajikistan
The Former Yugoslav Republic of Macedonia
Turkey
Ukraine
United Kingdom of Great Britain and Northern Ireland
United States of America

Appendix 2

National reports included in the regional report

Armenia
Belgium*
Bulgaria
Canada
Croatia
Cyprus
Czech Republic
Denmark
Estonia
Finland
France
Georgia
Germany
Greece
Hungary
Ireland
Israel
Kazakhstan**
Latvia
Lithuania
Montenegro
Netherlands
Norway
Poland
Portugal
Republic of Moldova
Romania
Russian Federation
Serbia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Tajikistan**
The Former Yugoslav Republic of Macedonia
Turkey
United Kingdom of Great Britain and Northern Ireland
United States of America

* Belgium (French Community) and Belgium (Flemish Community)
** Included in the Regional Report for UNESCO Asia-Pacific Region

Appendix 3

Expectations in relation to CONFINTEA VI (2009)

Expectation of what CONFINTEA VI could and/or should achieve	**Country/Countries**
Promotion of co-operation/networking	
Nurture transnational and international professional relationships, thereby encouraging cooperation between nations and stakeholders within countries	Bulgaria; Canada; Czech Republic; France; Germany; Israel; Latvia; Lithuania; Serbia; Slovenia; Switzerland;
Promote regional cooperation for adult education to advocate the establishment of Mediterranean Dialogue on Adult Education (MEDA) among all nations in the region. Promotion of regional peace	Israel
Strengthen international professional bodies such as UIL, ICAE and their regional bodies	Israel
Get information on global and regional developments in ALE	Czech Republic; Serbia
Draw attention to and reassert existing achievements, frameworks and agenda	
Showcase achievements to date in EFA	France
Put more emphasis on adult learning in the EFA and MDG	Norway
Provide Expert and financial support for accomplishment of EFA and MDG objectives on national level	Serbia
Re-assert “Hamburg Declaration on Learning by Adults” and the “Agenda for the Future”	Germany
Review achievements under the “Agenda for the Future”	Canada
Re-visit Sofia Call to Action	Estonia; Germany
Be an instrument to influence policy and practice of adult education and learning on national level	Serbia
Build on the achievements of CONFINTEA V	United Kingdom
Continue and expand emphasis on a global knowledge society, especially based on the increased movement toward a knowledge economy	United States of America
Assert the importance of ALE	
Give a clear message to the governments about the role and importance of ALE Position ALE as crucial not only to economic prosperity and work but also to social cohesion, democracy, sustainable development, community life, and the personal and social goals of individuals (Canada)	Canada; Czech Republic; Romania
Renew commitment to many of the goals of CONFINTEA V, including the more systematic integration of adult education into educational plans, funding structures, and the agendas of governments	Canada
Priorities, targets, means, resources	
Set priorities for practical implementation, define realistic targets and timetables, identify specific measures in order to achieve these targets with as broad a spectrum of players as possible being involved	Germany
Impact on national authorities in relation to priorities, targets, means, resources	
Strive to include development of adult education in the priorities of governments and persuade them to take responsibilities for ALE’s development and financial support	The Former Yugoslav Republic of Macedonia

That international focus on the needs of the adult learner, the importance of continuing higher education, the value of workforce development and the advancement of non-traditional students would be a priority for our state and national leaders, fostering realistic funding, improved communication and greater emphasis on the development of the American workforce as a viable competitor in the international community. (Center for Extended and Distance Education, Austin Peay State University)	United States of America
Assert the right to ALE	
Focus on all humans' right to knowledge as a condition for the creation of sustainable economic growth & development	Sweden
Assert the role of ALE	
Reassert the centrality & the holistic role of ALE and its wider benefits for all countries & in the creation of the learning society	Armenia; Canada; Estonia; Germany; Israel; Hungary; Slovakia; Slovenia; Sweden; The Former Yugoslav Republic of Macedonia
Assert the multidisciplinary, cross-sectoral challenge presented to policymakers across national/regional/local areas charged with making a whole range of 'collateral' policies	Germany
Take a stand – similar to CONFINTEA V – on the decisive importance of continuous learning in adulthood, specifically of vocational qualifications, for the development of societies and countries	Hungary
Make visible the power that education and learning have when combined with the organisations of civil society & their activities	Sweden
Contribute to knowledge about how education can help meet the demography and the structure of its economy and company change	Sweden
Emphasise adult education and training as important tools for development and for democracy and active citizenship	Sweden
Enable an exchange of experiences through the coordination and cooperation in the field of adult education and lifelong learning, aimed at ensuring national security and the construction of civil society	Armenia
Goals of ALE	
Set up the goals for ALE within a global perception, but also framework themes for its development in the closer orientation for continents/areas, countries and how to achieve them in practice	Slovakia
Set outcomes, conclusions to which ALE will be targeted and future perspectives for the development of policies and practice in ALE; novel frameworks for ALE	Slovakia; Israel
Improve adult basic education in such a way that literacy education can have sustainability	Norway
Assert the role of education for the whole person – avoiding disproportionate attention to any one of economic, social or cultural purposes	United Kingdom
Governance of ALE	
Look to reorganisation of competences between federal and provincial governments	Austria
Strive for enabling governance for ALE	Estonia
Promote the active involvement of the social partners and other stakeholders, including NGOs, in securing learning provision tailored to the needs of marginalised groups such as migrants, ethnic minorities, those with low educational achievements, older people, those living in rural areas and the disabled	Slovenia

Promote greater interconnection of the educational sectors (formal educational system, adult education and vocational training system)	Greece
Reinforce collaboration for research programmes and partnerships	Greece
Establish a clear contract between individual, employers and the state – define roles and responsibilities, especially in relation to funding	United Kingdom
Support for the development of a plan of actions in accordance with the strategy of adult education and the adoption of the law on ALE	Armenia
Funding of ALE	
Identify new financing possibilities for ALE	Bulgaria; Ireland
Draw the attention of governments to the need to equally invest in all dimensions of adult education, even in the “less productive” ones	Romania
Generate international support and promotion for acceptance of adult education as an investment in countries facing transition	Serbia
Take a stand for differentiated support by country-groups and state communities for the educational and training systems of less developed countries and their institutional and content-related reforms using community funds and for the creation of earmarked funds to assist in closing the gaps for the most disadvantaged groups of illiterates and functional illiterates	Hungary
Discuss financing of ALE, including demand-oriented financing	Switzerland
Draw the attention of governments to the need to equally invest in all dimensions of adult education, even in the “less productive” ones	Romania
Develop better processes for exchanging and accessing educational resources across national barriers	United Kingdom
Participation in ALE	
Strengthen the incentives and motivations for adults to learn (good practice)	Cyprus; Germany; Slovenia; Switzerland
Promote participation	Austria; Canada; Greece
Promote access to ALE	Armenia; Switzerland
Encourage activities for identifying and removing any barriers to adult learning, and for establishing demand-driven provision and facilities for the ALE sector	Slovenia
Facilitate access to and increasing participation in adult learning by all citizens, in particular those who leave initial education and training early and would like a 'second chance', those with insufficient basic skills and those with low educational achievements, with the aim of encouraging them to raise the level of their qualifications	Slovenia
Facilitate learner engagement – to support and share good practice in engaging learners in the design, management and quality assurance of ALE	United Kingdom
Serve as a catalyst for individual countries to focus on the unsung heroes of adult education in their countries to better understand, learn from, and publicize their efforts. These stories of successful outreach to adult learners could be shared across the globe to increase our common understanding (American Association for Adult and Continuing Education)	United States of America
Learning Framework	
Discuss adult basic education	Estonia; Switzerland
The development of new and accessible locations that stimulate and support reading	Canada
Give clear hints/lines about improvement in levels of adult literacy	Romania

Discuss adult learning for active citizenship and self-fulfilment; need to assert equal value of all ALE approaches, formal, non-formal and informal	Estonia
Provide a platform and launch plans to spur the use of technology to increase all types of ALE activities ranging from literacy to doctoral degrees, consortia to meet global challenges, and share quality learning resources beyond print	United States of America
Focus on the development of new educational methodologies	Greece
Promote and support mobility, including access to learning about language and culture, and transfer of qualifications for a globally mobile population	United Kingdom
Exchange of Experience	
To share educational experiences and receive professional feedback	Armenia; Austria; Bulgaria; Canada; France; Georgia; Ireland; Israel; Lithuania; Portugal; Serbia; Slovenia; The Former Yugoslav Republic of Macedonia
That active meta-discussion will be conducted between Conference delegates (official representatives of governments, non-governmental and civil society representatives, adult education experts etc.). There will be information on new tendencies & priorities of ALE within the national, European and global framework	Georgia
To be able to participate in brain-storming groups to analyse present policies and present ideas for the future; to discuss criteria for evaluating educational outcomes	Israel
Share experience and results of literacy provision with industrialised countries; renew contacts with industrialised Francophone countries on the issue of literacy provision	Belgium (fr)
Enable North-South exchange of experience	Belgium (fr)
Encourage E&T professionals to exchange their experiences in an international setting & to participate in further training	Hungary
Focus on connections between learning & migration & highlight education as a vehicle of integration of immigrants in working life and in society	Norway
To learn about legislation in other countries	France; Slovenia
Be able to identify problems and seek their solutions by joint effort.	Latvia
Recognise the work that is being done by the civil and voluntary sectors around the world to improve basic education for young and adults	Norway
Find out what works and what does not work	Germany; Lithuania; Slovenia
That a common inventory of good practice and projects aimed at motivating those groups which are particularly hard to reach, identifying key factors for their reintegration into the labour market and society, and enhancing their self-esteem be drawn up.	Slovenia
Quality in ALE	
Share expertise and develop appropriate international ALE quality assurance systems	United Kingdom
ALE Personnel	
Put qualifying adult learning professionals, including literacy trainers on the agenda; strengthen the role of ALE professionals	Armenia (in HE); Bulgaria; Cyprus; Ireland; Montenegro; Serbia; Switzerland
Recognising learning outcomes	
Put recognition of non-formal and informal learning on the agenda	Austria; Estonia; Switzerland
Share resources, policies, and programmes in Prior Learning Assessment and Recognition (PLAR).	Canada
Monitoring and Evaluation	

Put international/national indicators & benchmarking on the agenda	Armenia; Bulgaria; Canada; Estonia; Germany; Ireland; Latvia; Norway; Slovenia; Switzerland
Put research and statistics on ALE on the agenda Provide a basis for critical assessment of national achievements in the field of ALE as well as comparative evidence on the progress in other countries, helping in the reconsideration of national experiences and practices in implementing ALE measures	Estonia; Romania; Serbia; Switzerland Slovenia
To get support and assistance for implementation of international instruments and standards for research, follow up and evaluation	Serbia
To get support for development and introduction of quality system, accreditation and certification of non-formal ALE	Serbia
To discuss impact of internationalisation processes (such as Bologna and Copenhagen) on ALE	Switzerland
The development of quantitative and qualitative instruments to monitor the application of gender sensitive policies in ALE must be further developed and used	Estonia
Assert the need for annual reporting on ALE	Estonia
Support the development of comparative research into ALE	United Kingdom
Look to the Future	
Put forward a programme of developments and targets for ALE	France; Montenegro
Draft guidelines for improvement of the systems of adult education on a global scale for the forthcoming decade as it would be a significant contribution towards the perspective of the formation of regional and national adult education policy	Lithuania
To be able to start new projects and to meet project-partners	Serbia
That in the final documents, adopted by the Conference, such questions that will impact positively on ALE problems in municipal, national, European and global contexts be emphasised. Georgia is interested in appropriately bringing forward its ALE problems in these documents	Georgia

Appendix 4

Research on ALE in the Region

Summary of research topics described in national reports	
Topic	**Country**
Policy development role of stakeholders	
Educational policy and lifelong learning in Armenia: formulation of the basic strategic principles and continuous discussions	Armenia
Comparative analyses and strategic proposals for lifelong learning	Austria
The training policy in Flemish companies: determining factors and sticking points; The impact of the government in corporate training policies; The training policy in Flemish companies: determining factors and sticking points; Education Policy and Practical Scientific Research Study	Belgium (Nl)
The development of the VET system	Bulgaria
Active labour market policies; Labour force competitiveness indicators	Croatia
Bureaucratic response to policy change: implementation of adult education policy in Norway Lifelong learning in Norway – A deflating policy balloon or an act of piecemeal implementation	Norway
Researches on education politics and strategy, especially in the context of education system reforms	Serbia
The role of the state in creating opportunities for adult learning	Slovenia
The relationship between learning and economic success, and the associated policy implications	United Kingdom
Role of ALE/lifelong learning – general	
The place and the role of adult education, EU directives and strategies	Hungary
Adult education, leisure time and recreation	Serbia
Towards a lifelong learning society in Europe: the contribution of the education system	Slovenia
The relationship between economic performance, learning and work in adult life The role of lifelong learning in promoting economic competitiveness and social cohesion, and in mediating the interactions between the two domains	United Kingdom
Role of ALE/lifelong learning – specific	
Lifelong learning – definitions, dimensions and strategies	Bulgaria
Contribution of learning to mentally disturbed adults	Israel
The role of parent education in a life crisis Adult education and tourism Social inclusion and social cohesion Education as a tool for strengthening and social inclusion of the poor	Serbia
Human resource development	Romania
Strategies for inclusion and social cohesion in Europe from education	Slovenia
Financing ALE	
Post-secondary Education Accessibility and Affordability Review	Canada (Saskatchewan)
Work of the Expert Commission on Financing Lifelong Learning	Germany
Financing issues related to adult education	Hungary
Management of adult education	
Organising ALE in municipalities	Lithuania

Organisation and management in adult education Models of strategic management of adult education institutions	Serbia
Towards a more positive learning environment in Flanders	Belgium (Nl)
Needs analysis	
Educational needs and provision in Croatia	Croatia
Participation of at risk groups – learning needs Analyses of lifelong learning needs (2001); Competitiveness and educational needs of older employees (2005)	Estonia
Educational needs and possibilities in the field of trainings	Serbia
Guidance/advocacy	
Access to educational and career guidance services for adults	Bulgaria
Guidance and individual education plan	Denmark
Advocacy campaigns for adult education and learning.	Serbia
Guidance in Europe (research project funded by the Leonardo da Vinci Programme	Slovenia
Participation	
Resistance to participating in ALE	Austria
Participation of at risk groups; Research into the system characteristics which influence the participation in lifelong learning within the EU-15 (BEnl)	Belgium (Nl); Estonia; Ireland
Too Many Left Behind: Canada's Adult Education and Training Systems	Canada
Inequalities in adult access to continuing education Barriers to participation in continuing education	Czech Republic
Research on social milieus	Germany
Participation by men in ALE	Ireland
The participation of elder people in cyberspace The impact of participation on the health of elderly people	Israel
Accessibility of lifelong learning and educational opportunities	Latvia
National survey	Lithuania
Research on the availability of (adult) education	Serbia
Socio-group impact of participation in adult education on development of the knowledge Society	Slovenia
How do you motivate adults to take part in continued education?	Sweden
Guidance in ALE	Romania
Specific target groups	
Training for civil servants	Croatia
Older learners	Austria; Romania
Intergenerational learning	Romania
Research by the Roma Scholarship Foundation Research by the Employment Agency	Montenegro
Learning provision/organisation	
Informal learning and the acquisition of competences	Austria
ICT in the education programmes	Denmark
The status of non-formal adult education	Lithuania
Open and distance-learning in Flemish companies: towards self-instruction in a learning organisation	Belgium (Nl)
The processes of learning and its outcomes	United Kingdom
Methodologies in adult education	
Impact of ICT on continuing education	Czech Republic
Analysis of methodology, e-learning, and competency issues	Hungary
Didactical foundations of adult education and learning	Serbia
Pedagogies for adult learners in the international literature	Sweden
New technologies in adult learning	United Kingdom
Adult Basic Education (ABE)/literacy/key	
Participation in literacy learning in the Brussels region European resources for literacy Resources and publications produced by European projects Literacy in the French Community in Belgium Action research on the acquisition of French as a foreign language by asylum seekers Surveys of literacy in the Belgian French Community	Belgium (fr)

Pathway-to-work approach for people with literacy problems in Flanders; Learning as it is, in adults with literacy problems	Belgium (Nl)
Overview of Provincial and Territorial Policies examines the current policies and programs for adult education and workplace literacy across Canada	Canada
Adult Literacy in Manitoba: A Discussion Paper	Canada (Manitoba)
Key competences	Portugal
Functional literacy and basic adult education	Ireland; Serbia
Development of an educational model aimed at raising literacy levels and enabling sustainable development	Slovenia
Programme design and instructional practice in literacy programmes	USA
Adult Reading Components Study (ARCS) Dyadic interaction (interaction between pairs of students) and microgenetic (individual case) studies of language development, Research on Reading Development of Adult English Language Learners: An Annotated Bibliography (Adams & Burt 2002) Reading and Adult English Language Learners: A Review of the Research (Burt, Peyton, & Adams 2003)	USA
ALE for citizenship/democracy	
Evolutions and characteristics of non-formal education: Delphi survey amongst the regional folk high schools	Belgium (Nl)
Blueprint for action: building a foundation for self-sufficiency	Canada (New Brunswick)
Research related to citizens, peace and intercultural education	Serbia
Education and training for governance & active citizenship	Slovenia
Seven aspects of democracy as related to study circles"	Sweden
Workplace/work-based/work-related learning	
A review of the state of the field of workplace learning: what we know and what we need to know about competencies, diversity, e-learning, and human performance improvement Literacy programs in the workplace: how to increase employer support Improving essential skills for work and community: workplace and workforce literacy.	Canada Canada (Nunavut and the Northwest Territories)
Supporting older people in employment	Czech Republic
Interplay between education and training and workplace learning	Denmark
Lifelong learning, conditions for learning in formal educational environments and workplace-related learning Workplace-related competence development Learning in local trade unions	Sweden
Vocational Education and Training	
Costs and benefits of participation in labour-market related training from a participant's point of view; Staff management in SMEs: research into the characteristics of an effective SME policy Promoting participation and participation opportunities in labour-market oriented continuing education	Belgium (Nl)
Providing more practically oriented knowledge and skills with the aim of improving the competitiveness of adults on the labour market and the employability of the workforce	Bulgaria
Innovating companies' approach to HRD	Czech Republic
The possibilities of the adult population to participate in vocational education and training The functioning and the correspondence of vocational upper secondary education to the labour market in respect of the competence – based system for vocational qualification	Finland
Provision of training, accreditation, quality requirements, good practice	Hungary
Vocational adult education; Continuing professional education of adults – conception, models and institutions	Serbia
ALE in higher education	
Lifelong learning and the return of adults to higher education.	Belgium (Nl)

Learning outcomes	
Outcomes of education	Denmark
Recognition of non-formal and informal learning	
Recognition of prior learning/validation of non-formal and informal learning	Belgium (Nl); Denmark; Netherlands; Portugal
Quality	
Quality of adult educational services	Bulgaria
Quality assurance	Denmark
Quality of formal education	Croatia
ALE personnel; initial and continuing professional development of ALE personnel	
Up-skilling teachers	Denmark
WSF study on continuing education personnel	Germany
Developments in economic processes and circumstances and their effects on adult education	Hungary
Professionalisation of adult education and learning area Content and methods of further education for adult education personnel	Serbia
Evaluation/impact studies	
The impact of the government in corporate training policies	Belgium (Nl)
Evaluation of adult liberal education 2007	Finland
Effectiveness and evaluation of planning and projects;	Hungary
Evaluation of how the municipalities implement the right and obligation to Norwegian language training and social studies	Norway
Evaluation of the effect of the public education centre	Turkey
The non-economic benefits derived from learning at all ages The economic impact of education and its cost effectiveness	United Kingdom
General research	
History of ALE	Austria
Lifelong Learning in Flanders, a Flemish strategy report; Towards a Lifelong Learning Society in Europe: The Contribution of the Education System	Belgium (Nl)
Lifelong Education	Bulgaria
Study on ALE by CYSTAT	Cyprus
Comparative analysis of trends, developments and possibilities of continuing adult education in the context of European integration; Adult education at various stages of the life cycle: priorities, opportunities and possibilities for development; Possibilities of systematically introducing distance or combined forms of study within the further education of teachers	Czech Republic
State of ALE	Romania
Life as Learning (LEARN) A National Research Programme	Finland
“Provider research” cooperation project	Germany
BASICS! Adult Learning; status, challenges and recommendations	Norway
Economic development, knowledge and education Historical and comparative aspects of adult education and learning Coordination with European values, standards and solutions in the area of professionals’ education and graduate education (European Qualifications Framework)	Serbia
Regional development of adult education	Sweden
Participation in International Research	
Participation in European Co-operation projects within Lifelong Learning Programme	Mentioned by virtually all countries in EU-27+
Participation in OECD research studies	Mentioned by many countries in the region

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