

**Lifelong learning: Potential and constraints  
with special reference to policies in  
the United Kingdom and Europe**

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## Preface

In this paper Paul Ryan, Fellow of King's College, University of Cambridge, takes a critical look at lifelong learning policies as they have evolved in recent years, particularly in Britain and elsewhere in Europe. The paper penetrates the often dense rhetoric that has often characterized the debate on this theme of education, learning and training, which is central to countries' endeavours to become true learning and knowledge societies.

The paper assesses outcomes and policies of lifelong learning in terms of their effects on: (i) economic efficiency – is the economic value created by the policy greater than the cost? (ii) equity – does it reduce the “learning divide” between population groups? and (iii) personal and social development – i.e. learning for its own sake, not simply as a way to raise output or lower inequality. It discusses various forms of sponsorship, including sponsorship by employers, that offer prospects for increasing individuals' participation in learning. Trade unions and partnerships have an important role to play in promoting lifelong learning as they can contribute to equity goals and can positively influence individuals' participation in learning. The social partners will be key players in making lifelong learning a reality for all.

It is hoped that this paper will stimulate further debate on this complex subject. I would like to express my sincere thanks to Paul Ryan for writing this paper and to Torkel Alfthan and Trevor Riordan for initiating and managing this project.

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## 1. Introduction

The term “lifelong learning”, coined as long ago as the 1970s, has gained currency at an accelerating rate, along with the related concepts of the “learning society” and the “learning organization”. These concepts both describe and advocate particular patterns of learning.

As advocacy, lifelong learning nowadays tops the policy agenda at both international and national level. Leading advocates include the OECD, the European Commission, and various national governments (OECD 1996, 2001; CEC 2000; World Bank 1999; DfEE 1998a). The importance attached to lifelong learning is reflected in the accompanying rhetoric. The British Government presents lifelong learning as the basis for a “new renaissance” for the country. A British Minister for Lifelong Learning has depicted it as “the battering ram against inequality, the oil of community development and the engine of economic development” (DfEE 1998a; Crease 2000).

Lifelong learning must be defined before it can be analysed. A literal definition is simply “all learning”: everything that people learn across their entire lifespans. Thus a recent analysis of the finance of lifelong learning defined it as including practically all learning occurring between cradle and grave, from early childhood care to the training of older workers. The result was a comprehensive review of the economics of the knowledge and skill (OECD 2001).

A definition that wide is neither distinctive nor readily manageable. Narrower definitions have also been proposed. One limits “learning” to purposeful activity, excluding passive learning from experience. Governments and survey designers often favour such an approach – though not economists, who see unguided learning-by-doing as important. Another approach is to restrict the concept to adult learning (CEDEFOP 2002). This paper takes lifelong learning to be adult learning, widely defined. The topic is made tractable by concentrating on what is relatively new and distinctive in the lifelong learning agenda, compared to its antecedents in both public policy and learning practice.

Traditional practice stereotypically involved the concentration of learning into formal education and training, undertaken while young. The resulting knowledge and skill was expected to suffice throughout adult life. Only a minority learned much while young. Thus, in Britain, post-compulsory education was traditionally the preserve of a small elite, many young males undertook post-compulsory craft apprenticeships, and the majority of young people left school without qualifications and received no formal training thereafter.

Dissatisfaction with traditional practice has been long-standing. The antecedents of lifelong learning include: in Britain, the adult education provided by the Workers’ Educational Association throughout the twentieth century and the literacy campaign of the mid-1970s; in France, interest in *éducation permanente* from the 1950s onwards and employee statutory rights to educational leave from 1971; and the OECD’s promotion of recurrent education in the 1980s. In developing countries, Cuba’s adult literacy movement of the 1960s stands out. These precursors emphasized general learning by adults, particularly those who had possessed little prior schooling (Woodrow et al. 2000; Wells 2001; Levin and Schütze 1983).

Partly as a result of these movements, traditional patterns of participation in education and training had been in decline long before the rise of the lifelong learning cause. Participation in post-compulsory education and training has risen strongly in recent decades. Lifelong learning policy approves the trend, and seeks to extend and shape it. It differs from them in three leading respects, viz., its advocacy of: universal learning, both

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across the life cycle and across individuals; the centrality of the individual as the sponsor of learning; and innovation in the content and methods of learning.

The importance accorded by governments to these components of the lifelong learning agenda varies from country to country. This account is written with particular reference to British policy, which actively promotes all three, but similar themes dominate the lifelong learning policies of international organizations and other national governments (Aventur et al. 1999; ECOTEC 2000; CEDEFOP 2002).

The situation in developing countries is not discussed here. Lifelong learning is potentially an irrelevant luxury when initial learning is in crisis. Nevertheless, some lifelong learning themes, including the importance of work-based learning, and inequities in the public funding of learning, resonate in developing countries (Middleton et al. 1993; Puchner 1995; ILO 2001: 56).

The criteria on which lifelong learning policies are to be judged are discussed in section 2. Section 3 considers the three distinctive attributes of lifelong learning. The roles of trade unions and partnerships are discussed in section 4, followed by the conclusions in section 5.

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## 2. Goals and content

Outcomes and policies are assessed here in terms of four criteria: efficiency, equity, and personal and social development. Economic analyses are restricted to the former pair. Liberal and social concerns require consideration of the latter pair as well. Some consideration is given also to political goals, such as the containment of public spending.

The efficiency criterion asks: is the economic value created by a policy greater than its cost? The standard approach is to estimate the social rate of return on an investment in learning. If it is sufficiently high – i.e., higher than some social discount rate – then undertaking the investment increases economic efficiency. The efficiency criterion is potentially important, both as a justification for more extensive learning and as a restraint on economically excessive learning. The former is a matter of the net economic benefits of increased skill to the economy as a whole. The latter reflects the possibility that some investments in skill cost the economy more than the value they create. Thus investments in the skills of the old are unlikely to prove efficient, given the brevity of the period on which a return can be earned.

Equity criteria are also prominent, particularly in the case for universal adult learning. Thus the disproportionate participation of more skilled people in adult learning is widely interpreted as evidence of unequal access, and condemned as unfair (Béret and Dupray 2001). A fairer arrangement might offer adults more “second chances” than “second helpings” and thereby reduce the existing “learning divide”. Similarly, in post-compulsory youth education and training, the lion’s share of public support is garnered by the minority that enters higher education, with its high rates of public subsidy. Little more than labour market programmes, with their meagre funding and weak benefits, is available for the least advantaged members of the age cohort. Such a distribution of public support is often condemned as unfair (Ryan 1991; Layard et al. 1995).

Egalitarian concepts of social justice may validate policies whose postulated efficiency benefits prove spurious. Thus a weak efficiency case for publicly funding learning by older workers does not rule out a case in equity, as long as it is confined to people with little skill and low income (Levin 1998). Equity certainly features prominently in the advocacy of lifelong learning (e.g. “the battering ram against inequality”, *loc. cit.*).

Finally, personal and social development may be prized – for their own sake, not simply as a means to higher output or lower inequality. Personal development is the central objective of liberal education, with its emphasis on personal autonomy and independent, critical thinking. Liberal values historically fuelled the adult education movement, with its emphasis on general (non-vocational) studies and participation in groups. Those values are nowadays on the defensive, criticized variously for masking elitist educational practices unacceptable in a “post-modern” culture, and, more influentially, for low vocational relevance in an era of intensified economic change (Edwards and Usher 1998). Indeed, the lifelong learning agenda has at one level abandoned the liberal ideal of intellectual development through learning, in favour of such instrumental, work-related objectives as “employability”. However, even the critics of liberal development values implicitly accept the importance of those ideals when they report approvingly instances of the transformation of lives and minds as a result of engaging in learning.

The potential of learning to contribute to social development also features in British policy statements. The benefits of education for socio-political involvement, democratic government and political stability have long been recognised (McMahon 1998). A particular aspect is often emphasised for lifelong learning: community regeneration. Community decay is prominent in several advanced economies, associated with low skills, unemployment, benefit dependency, drug abuse and crime. Lifelong learning advocates

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have been encouraged by evidence that adult learners tend to be more active in their communities than are non-learners (McGivney 1993). The hope is that lifelong learning will galvanize not only disadvantaged individuals but also their communities, and thereby generate more neighbourly and safer social relations (“the oil of community development”, loc. cit.; DfEE 1998a, 1999a: 60).

As the importance attached to these differing goals varies, so does the content of the lifelong learning agenda. For example, a high implicit priority to efficiency is suggested in the OECD’s exclusion of post-retirement learning (University of the Third Age, etc.) from its otherwise comprehensive approach. In the European Union, the Italian, Swedish and Spanish Governments explicitly give more weight to equity and personal development, relative to efficiency, than do their British and Dutch counterparts. In Britain, the current government, while sharing its predecessor’s prioritization of efficiency, gives greater weight than it to equity and developmental concerns. By contrast, educationists criticise the economic and instrumental orientation of much lifelong learning advocacy, and emphasize instead the power of learning to build confidence and even transform consciousness (OECD 2001; CEDEFOP 2002: 9; DfEE 1998a; Jarvis 1993; West 1995).

This discussion gives weight to the first three objectives, while accepting the priority of social justice and personal development over efficiency for most European Governments. Community development is largely set aside: it might well benefit from any expansion of lifelong learning, but the links are complex and fragile.

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### 3. Attributes of lifelong learning

This section identifies the three central attributes of the contemporary lifelong learning agenda and discusses their desirability and attainability. The attributes in question are: universal learning, the primacy of the individual learner, and innovation in the content and methods of learning. The principal source of examples is the lifelong learning policies of the British Government, a leading supporter of the cause (box 1).

#### 3.1. Universal learning

The case for universal learning typically contains two dimensions: across individuals, and across life cycles. All individuals must embrace the new learning culture. In life cycle terms, individuals must rely less on initial learning and learn more as adults. For adults, that means more upgrade training, retraining and, for those who did not learn much in school, remedial learning of basic skills (reading, writing, arithmetic and IT).

##### Box 1. Lifelong learning policies in Britain

###### 1. Universal learning

National Learning Targets: By 2002, 50 per cent (28 per cent) of economically active adults to have achieved level three (four) qualifications, vocational or general, respectively; actual attainment was 45 per cent (26 per cent) in 1998; the share of non-learners in the adult population is to be reduced by 7 per cent, 1998-2002. Get On, Read Write Plus: funds for basic skills (literacy, numeracy and IT) courses and summer schools. New Deal 25+ and Work-based Learning for Adults: labour market programmes offering education, training and work experience primarily to long-term unemployed adults. Adult and Community Learning Fund: public funds for innovative community-based activities with learning content, laid on in deprived areas.

###### 2. Role of the individual

Individual Learning Accounts (2000-01): Government contributions to individual accounts to be used for payment of fees for learning activities (box 4, below). Career Development Loans (1988-): subsidized commercial loans to individuals to cover course fees. Training Tax Credits (to 2000): income tax deductibility of fees for courses leading to recognised qualifications. "learndirect" (1998-): learning and careers helpline and website, offering advice and guidance to adults. Youth Training Entitlement (1999-): right for unqualified 16 and 17-year-old employees to paid one-fifth time off work for learning, subject to employer agreement.

###### 3. Innovation in learning content and methods

National Vocational Qualifications (1987-): Certification of work-based employee competence, including accreditation of prior and informal learning. University for Industry (Ufi; 2000-): on line provision of distance learning in vocational and basic skills, and guidance in choice of learning options; creation of IT-based learning centres in new locations, including shopping malls, sports clubs. Learning and Skills Council (2001-): coordinator, national and local, of funding and provision of post-16 learning; contracts for learning services with specialized providers and employers, for-profit and non-profit.

###### 4. Trade unions

Union Learning Representatives (1998): Union right to appoint workplace representatives to encourage and support employee learning in workplaces with union recognition. Union Learning Fund (1998-): Public funds for union-sponsored projects in support of members' learning.

Source: DfEE (1999a, 1999b), DfES (2001), [www.dfes.gov/adultlearners/](http://www.dfes.gov/adultlearners/), Hillage et al. (2000)

#### Extent of adult learning

How far from universal learning do things stand at present? The answer for Britain, as for most advanced economies, is "a considerable distance".

The scale of adult learning may be gauged in terms of flows or stocks: the share of individuals that undertakes learning during a period or that has already attained a particular

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skill level at a particular time. Flow measures differ according to definitions of learning, adulthood and reference period. In Britain, at one extreme only one in seven adults (25+ years) is found to have participated in learning during the previous four weeks; at the other, around two in three 16-69 year-olds, to have undertaken some active learning during the previous three years. A core of around one in four adults has done no learning during the past three years, and around one in eight expresses indifference or aversion to further learning. In stock terms, slightly less than one in two British adults is qualified at Level 3 – i.e. at upper secondary or craft level, in general and vocational fields respectively. Around one in seven adults holds no qualification at all; more than one in five adults shows low literacy and numeracy. Both the flow and the stock measures suggest therefore that adult learning in Britain currently falls well short of the universal (Hillage et al. 2000: 47; DfEE 1998b, 1999b).

The incidence of adult learning varies in a familiar manner with personal attributes. It is particularly low among older people, among those with low initial education, and among low skilled, low paid and female employees. The factors that are associated with low participation rates constitute an overlapping set of indicators of socio-economic disadvantage and “failure”.

The pattern by age is of particular interest in the lifelong learning context. In Britain, the incidence of recent learning among 25-29-year-olds is nearly twice as large as that amongst 50+-year-olds. Similarly, “on average across countries, adults aged 55-64 are about half as likely to participate in continuing education and training as those aged 25-34” (OECD 1998: 206). A step decline typically occurs at retirement, generated entirely by work-related rather than general learning (Hillage et al. 2000: 51).

Marked differences in the scale of adult learning are visible across countries. Adult participation is more extensive in Norway than in Britain, where it is in turn more widespread than in Spain. Average time spent by adults in learning varies in data for nine countries from less than 30 hours per year in Belgium to more than 90 in New Zealand (Sargant 2001; OECD 1998: 205).

Lifelong learning advocates often hope that adult learning can compensate for deficiencies in initial learning: e.g., that Britain’s above average rates of adult training can offset its below average achievements in initial education and training. The prospects for such compensatory effects are however limited. Across countries, as across individuals, more initial learning tends to be associated with more adult learning (Sargant 2001).

## British policies

Official desire to expand learning is reflected in the adoption of the National Learning Targets, which stipulate the growth in workforce skills that the Government considers desirable and attainable in the medium term. Progress is judged primarily by the share of the population possessing qualifications. The current target for adults is for one half of the workforce to have achieved a Level 3 (upper-secondary or craft) qualification. A target has also been adopted recently for increased participation of adults in active learning (box 1).

Policies to promote the achievement of those targets include: basic skills programmes, aimed at adult deficiencies in numeracy and literacy; increased attainments in compulsory education; training programmes for the long-term unemployed; and encouragement to employers to provide more training. A small amount of funding is also available for community-based learning-oriented projects in deprived areas.

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### 3.1.1. *Universalization: Individuals*

The case for universalising learning is often advanced on efficiency grounds. The requirement is commonly attributed to the increasing pace of change in both technologies (dissemination of information and telecommunications technologies) and markets (globalisation of product and financial markets). These trends increase the relative productivity of skilled workers and the rate at which skills depreciate, as the “half-life” of knowledge falls. Individuals must consequently learn more and replace their previous learning more often if they, their employers and their countries are to prosper in a more integrated and competitive world economy.

The case gains some support from evidence of the economic benefits of skill. The evidence includes: high and rising returns to education for individuals in many advanced economies; the benefits for organizational performance of “high-performance work organization”, with its emphasis on employee development; and the secular trend in employment composition towards occupations with high skill requirements (Ichniowski et al. 1996; Gottschalk and Smeeding 1997; Katz and Autor 1999; ILO 2002).

Innovative work organization often brings considerable economic benefit. Plants that use flexible production methods and associated human resource management practices, including extensive employee training, typically perform better than do those that adhere to traditional mass production, with its low levels of employee training. A leading example is provided by automobile assembly, traditionally the seat of “Fordist” mass production, but pulled powerfully in recent decades towards flexible, skill-rich production methods by the successes of Japanese and German producers. High performance work organization nowadays sees the automobile company actively encourage employee learning, non-vocational as well as vocational. Leading companies provide and subsidize workplace learning facilities for use by all employees (box 2).

#### Box 2. Employee development in the automobile industry

A survey of around 60 assembly plants world-wide found that employee training, the main component of HRM practice, is more extensive under flexible production, with its use of lean production, multi-tasking and teamwork, than under mass production, with its extensive subdivision of labour, low skill requirements and limited employee training. Flexible production is associated with higher labour productivity and product quality. The benefits of greater employee training depend at least partly on the adoption of congruent work organization, recruitment and compensation practices.

Leading automobile producers in Britain who traditionally relied on mass production, including Ford, Vauxhall (GM) and Peugeot, nowadays encourage all employees to undertake education and training outside working hours in employer-provided workplace learning facilities and courses. Ford Britain's EDAP programme even excludes learning directly related to job requirements. Between ¼ and ½ of employees participate each year. These employers expect the promotion of a learning culture to increase employee skills and morale, and to improve industrial relations.

Source: MacDuffie and Kochan (1995), MacDuffie (1995), Mortimer (1990), DfEE (1999a), Labour Research (1999).

Nor are such practices limited to the car industry. Many employers, often but not exclusively household names, nowadays provide employees with access to corporate “universities”, academies, learning centres, etc. Even some smaller service sector employers in developing countries promote generalized employee learning, in association with flexible production (Greany 2000b; ILO 2002).

Flexible production and associated employee learning are normally associated with higher productivity, in the automobile industry and elsewhere. Evidence of economic benefit from innovative work organization has however not led to its widespread adoption, by American and British employers at least. Although a majority of US employers have by now adopted some innovative work practices, piecemeal approaches have predominated,

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accompanied by widespread disappointment and frequent abandonment of the changes (Ichniowski et al. 1996). The limited extent of employer efforts to become “learning organizations” calls into question the prospects for this route to universalising adult learning.

These limits are visible in the automobile industry itself. The large employers who nowadays encourage employees to learn outside working hours still ration access to job training in working hours. Many production workers therefore find it easier to learn about non-vocational than about job-related topics. Moreover, even when employees enjoy access to learning on company time, the hierarchical structure and traditions of the organization can constrain its effectiveness. An example is provided by a first degree course taught at the workplace by a local university to the middle managers of a large British assembly firm. The open-ended and curiosity-fuelled learning that teaching staff sought to cultivate proved elusive in the face of narrowly instrumental, grade-oriented and unquestioning attitudes amongst the “students” – who commonly took phone calls during teaching sessions and used their secretaries to perform course-related tasks (Kinman and Kinman 2000).

Still greater limitations are visible in the apparel industry, which, though declining, still provides considerable employment in advanced economies. The great majority of British and American employers adhere to traditional, low-skill, piece-working methods, honed down over years of experience. Yet the minority of UK and US clothing employers who have adopted flexible production, and, with it, more extensive and formalized training, tend to enjoy greater productivity and profits – again, as long as they take a comprehensive rather than a piecemeal approach to innovation. Similarly, most German apparel employers use skill-intensive methods to produce higher quality products. In most countries, however, a potent combination of inadequate managerial skill, limited funds for investment, and the appeal of traditional methods when competing primarily on price in the product market, renders minimal the sector’s contribution to lifelong learning. The most vivid symbol of the problem is the view, widespread amongst US producers, that even production supervisors do not need to be able to read and write in order to do their job, and therefore do not need training in that skill.

**Box 3. Employee development in the apparel industry**

Traditional production methods (“flexible bundle”, “making-up-in-pieces”) involve long product runs, intense subdivision division of labour, time and motion study, payment-by-results, reliance on on-the-job training and learning-by-doing by a workforce that is disproportionately female, immigrant and low in educational attainment. Flexible (“modular”) production, by contrast, requires greater employee training, in association with multi-task job design and teamwork. The productivity advantage of flexible over mass production in apparel, in terms of labour and capital productivity and delivery times, is substantial.

Nevertheless, only a small share of (at most one in ten) US and UK apparel producers has adopted flexible production, and only one in two US apparel employers provides any formal training. Employers who stick with traditional methods often consider that production workers and even supervisors do not need to follow written instructions to do their jobs, and therefore do not need even basic skills. Moreover, in a sector marked by low pay and high labour turnover, any employer investment in training is vulnerable, particularly as it increases outside employment options. Weak managerial skills, low take-up of information technology, and the high investment requirements, in physical as well as human capital, of comprehensive innovation also contribute to inertia. In the German clothing industry, most operators are trained to craft level, as part of skill-intensive specialization on products with higher quality content than in comparable British plants.

Source: James (1987), Steedman and Wagner (1989), Dunlop and Weil (1996), Bailey and Sandy (1999), Appelbaum et al. (2000), McLoughlin (2000).

Similar disappointments characterise some attempts to implement lifelong learning in small firms in other sectors. A programme to encourage employee learning on industrial estates in Britain, by setting up IT-based local learning centres to offer training outside working hours, encountered major employer-related barriers to worker participation, in the

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shape of limited corporate resources, including managerial skills and support for staff learning (Devins et al. 2001). Similarly, weak management skills have been identified as the principal obstacle to employee learning in SMEs in the London area (Jones and Coles 2000).

A further, poignant example of the difficulty – and an indicator of the limits of government commitment to lifelong learning in practice – is the poor to non-existent learning opportunities frequently provided to their staff by learning providers themselves. In Britain, examples include: training staff in commercial training organizations, many of whom receive only statutorily mandated training, e.g. in health and safety procedures; classroom assistants in schools; and, most striking of all, teaching staff in public further education colleges, many of whom lack pedagogical or vocational qualifications, or both (Slack 1999; TSC 2000; Ryan and Unwin 2001).

A key issue for any efficiency-based case for universalising adult learning is therefore the extent to which the diffusion of learning-intensive innovations in work organization is held back by managerial and market failures, preventing the realization of attainable economic benefits – as opposed to a lack of economic benefit in the first place. Were the latter interpretation to prevail, it would destroy any efficiency-based case for universalization; were the former to do so, it would sustain an efficiency-based case for expanded – though again hardly universal – participation.

The evidence suggests that both interpretations are relevant. Concerning the latter, there is little prospect that contemporary trends in technologies and markets will require all employees to become skilled: a substantial share of employment can be expected indefinitely to involve low skill requirements. Technical change and employer reorganization sometimes lead to the creation of lower skill requirements: the proliferation of call-centre employment is a case in point. Structural change does so too in some areas. A leading example is hairdressing, with its limited training practices and learning opportunities, which has also seen strong employment growth as a result of slow productivity growth and favourable demand attributes (Ferne and Metcalf 1999; Rainbird 2000).

Concerning the former interpretation, many employers do indeed stand to gain from innovative work organization and increased employee learning but, for various reasons, including capital requirements, internal opposition and sheer inertia, hold back from change (Ichniowski et al. 1996; Appelbaum et al. 2000). It is their abstention that points to the efficiency-based case for increased participation in adult learning, and towards a role for public policy in fostering innovative work organization.

### **3.1.2. Life-cycle aspects**

An efficiency-based case for universalization faces particular difficulty in the life cycle dimension, where it conflicts with the requirements for optimal investment. Human capital theory does predict that limited prior learning, combined with time constraints, when young, and skill obsolescence when grown up, will lead adults to continue investing in skill as they age. It also predicts however that the rate of investment will taper off with age and experience, and become negative in later working life (Ben Porath 1967).

The first reason for an optimal decline in learning with age is that the economic benefits of investing in older workers are reduced by short pay-back periods (time until retirement). For retired workers, economic benefits are limited to consumption benefits (from learning itself and from any complementary consumption activities). The second reason concerns cognition. As any older people undertaking a demanding educational course knows, cognitive capacities – notably fluid intelligence, episodic memory and the ability to learn rapidly and flexibly – decline with age. Cognitive deterioration can be

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offset to some extent by experience-based improvements in the way memory is organised, including techniques as simple as using a diary, but some functions start declining early in adult life and drop significantly through middle age (Parkin 1993; Baddeley 1999).

### Other criteria

Any case for universal adult learning must therefore hinge on considerations other than efficiency. Equity provides one possibility. Mainstream concepts of social justice favour a less unequal distribution of learning, or at least of opportunities to learn and of financial support while doing so. Egalitarian arguments for reducing the inequality of public support for post-compulsory education and training, with its bias towards the already privileged full-time young university student (section 2 above), are widely accepted nowadays, as part of concern over the wider, class-related “learning divide”. In Britain, per capita funding of university students has been reduced accordingly, and that of work-based learners increased. At the same time, the political influence of more affluent families, to which most of the Government funding for mainstream first degrees accrues, currently threatens to reverse what limited movement in that direction has occurred to date.

Not even equity can sustain a case for universal learning, however: many low income households have needs more pressing than learning, such as additional income and health care, and some reject the idea of learning in the first place. Many low paid workers stand to gain more from a higher minimum wage than from support for learning, particularly as the effects of wage regulation on employment and work-based training appear weak (Ryan 1991, 2001b).

Personal and social development provide the only potentially valid bases for universal learning: even older people with no economic future and more affluent people with no need for public support stand to gain developmentally from it. Communities replete with learners might benefit likewise. The difficulty here is wholly one of feasibility: how to induce non-learners to engage in learning. The relevant unwillingness includes not only aversion to any further learning but also the reluctance of those with a purely instrumental orientation to engage with learning for its own sake. The frequency of those attitudes amongst adults make universalization an appealing but infeasible ideal: the University for Industry estimates that almost one in three British adults is either “switched off” or “personally uninterested” in learning (Ufi, 2001).

However, even if none of the four criteria deployed here can by itself sustain both an effective case for universal learning and a reasonable prospect of attaining it, all favour a marked expansion of learning across individuals, and at least some expansion within individual life cycles. The case is strengthened when all four objectives are valued. The emphasis falls then on increased learning by deprived and low skilled young adults, with their long working life expectancies, their low endowments, and their frequently stunted personal horizons and low community involvement. For lifelong learning, however, that group constitutes one of the toughest nuts to crack.

### **3.2. The role of the individual**

The second theme pervading the lifelong learning agenda is the emphasis on individual responsibility for learning. The point is underlined by the terminology. “Learning” suggests the individual, as active learner, whereas its antecedents, including “recurrent education” and “adult training”, pointed towards institutions and instructors. Similarly, the universalization of learning in a “learning society” is implicitly defined in terms of the members of that society.

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Again, this aspiration in lifelong learning may be viewed in relative rather than absolute terms. The centrality of the individual may be a matter of emphasis rather than exclusivity. The goal then is simply to make the individual more important, relative to the employer and government, in the initiation and finance of adult learning without requiring that the individual always play the paramount role.

The case for the primacy of the individual has been motivated variously by all of the criteria considered above: economic, ethical, developmental and political. The economic case is simple and potentially compelling. Insofar as the individual stands to benefit from his or her learning, he or she has the incentive to organize it and pay for it. To the extent that the benefits of learning accrue to the learner, efficiency requires the beneficiaries of learning to equalize costs and benefits at the margin. It may also be thought fair for those who benefit from a practice to pay for it. Similarly, although liberal and educational values emphasize learning when young, as central to the development of the autonomous personality, continued learning as an adult potentially completes the process.

The political case is pragmatic. The scope for government to pay for increased learning is widely curbed nowadays by political pressure to limit the overall share of public spending in national income, and by competing and politically more influential demands on public spending. Similarly, the prospect that employers might pay for an expansion of learning is weakened by their great political influence, given that the private employer is widely seen nowadays as the key to success in international competition and the reduction of unemployment.

Individual responsibility for lifelong learning means that individuals should organize their own learning and bear a share of the costs that reflects their share of the expected benefits. Public support for individuals is however envisaged. Its principal ingredients in Britain involve finance and information. Individuals are to be helped to fund their own learning, and given advice and guidance to help them choose wisely in doing so. Nor is adult learning to be left entirely to individual initiative and government support. Subsidiary roles are also envisaged for employers, trade unions and partnerships.

The emphasis on the individual in the lifelong learning agenda also faces problems of desirability and feasibility. Concerning desirability, although we have seen that the values of efficiency, equity and personal developmental all favour in principle the centrality of the individual, some exceptions must be noted. The economic analysis of training points to an important role for the employer when skills are specific to its activities, i.e., can neither be acquired by the employer from, nor sold by the skilled worker in, the external labour market. The employer and the worker should then act as joint principals in the organization and finance of training (Becker 1964). Similarly, it may be considered unfair that individuals who made little use of public funding for learning when young, as a result of leaving school early, should pay most or all of the cost if they restart learning as adults, even if they stand to gain from the learning.

## Training sponsorship

The feasibility problem is again the more fundamental. The difficulties centre on adult work-related learning (here “training”). A distinction may be made between training that is sponsored – i.e., initiated and organised – by employers for their employees, such as the training on-the-job of sewing machinists in the apparel industry, and training that individuals sponsor for themselves, such as truck driver training at a propriety training institute (Ryan 1991, 1995; Grubb and Ryan 1999).

In practice, employers who sponsor training provide most or all of the finance, in the sense of paying the trainee – learning occurs “on company time” – and covering any direct training costs (including course fees). Employer-sponsored training is geared typically to

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job change within the organization, including upgrading training for promotions, and retraining for transfers. It is associated with moderate increases in pay. The financial attributes of the training for participants – zero cost, some benefit, low risk – make it particularly attractive to employees, who rarely refuse to take it when offered. The principal drawback concerns availability: employers ration access.

Self-sponsored training is financed in the first instance by the individual himself or herself. Financial support by public bodies may be involved, but help from the employer rarely is. Among the unemployed, self-sponsorship is typically geared towards finding a job; among current employees, towards occupational change, usually accompanied by a change of employer. Its financial attributes for participants differ radically from those of employer-sponsored training. It is more costly, as it is rarely conducted on company time and it typically lasts longer. It is potentially more beneficial, as changing occupation and job promises greater pay gains than does internal mobility. It is riskier, as the probability of adverse outcomes, including unemployment and failure to move up occupationally, is also greater. Access to self-sponsored training is rationed by price, and thus by trainees' willingness and ability to pay. The failure of capital and insurance markets to cater efficiently to investment in human capital restricts severely ability to pay among low income households, providing a well established case, on both efficiency and equity grounds, for financial support from public funds of self-sponsored training (OECD 2001).

The two types of sponsorship differ also in the certification of learning. The success of self-sponsored training typically depends on the acquisition of a qualification, for use as a signal of skills to potential employers. Employers who sponsor training usually prefer to avoid the certification of what tends to be informal, specific and episodic learning, with an orientation toward career progression inside rather than outside the organization.

The dichotomy between employer-sponsored and individual-sponsored training is less than absolute in practice, and may even be declining. Employers do subsidize some of the training that employees sponsor for themselves – by providing employee development programmes in the automobile industry (box 2, above) and tuition payment programmes, e.g. for employees studying outside working hours for Meister and technician qualifications in Germany (Levin and Schütze 1983; Mahnkopf 1992). Nevertheless, the broad distinction between employer-sponsored and self-sponsored training, including the contrast between their financial implications for the individual learner, is confirmed by the few studies of training incidence that shed light on the issue (Rigg 1989; Lynch 1992; Green 1999). Similarly, a survey of adult learning in several countries concluded that “few courses were reported to be co-sponsored by employers and employees (between 0 and 5 per cent)” (OECD 1998: 210).

Other types of sponsorship are also potentially important in adult learning – including government-sponsored training in labour market programmes for the unemployed. The results have however been disappointing, in skill terms at least. Only a minority of adult participants in British programmes emerges with a qualification. Gains in pay and employment rates prove confined to particular categories of participant. Poor results may reflect low funding per participant, but even more expensive and ambitious training programmes do little to benefit participants when skilled labour markets are in surplus, as in Germany nowadays (Grubb and Ryan 1999; Ryan 2001a). No further attention is paid here to government sponsorship.

### Implications of sponsorship for lifelong learning policy

The distinction between the two types of training sponsorship is potentially important for lifelong learning, given the marked difference in their participation patterns, both across individuals and across the life cycle. Taking the former first, the lion's share of adult work-related learning (setting aside government-sponsored labour market

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programmes) is employer-sponsored, accounting, e.g. for four out of every five such events in Britain in the mid-1980s. The balance between the two sponsorship categories varies from country to country. In Europe, employer sponsorship is even more important in France than in Britain, but less important in Scandinavia and the Netherlands. Self-sponsorship dominates the formal training of young workers in the US, but the access of American youth to employer training programmes is notoriously low, and the same does not apply for adults. The difference between the shares of adult learners who receive financial support from (i) an employer and (ii) themselves or their family is indeed particularly high in Britain (56 percentage points). It is fully 41 points in the US, and negative only in Switzerland, out of ten countries for whom comparable data are available (Rigg 1989; Aventur et al. 1999: table 1; Lynch 1992; OECD 1991; OECD 1998: 219).

In terms of learning across the life cycle, employer-sponsored training is potentially the more appealing, as participation is less age-dependent than in self-sponsored training. Participation declines with age in both categories, as predicted by the economics of investment, but, in Britain at least, the decline with age is much stronger in self-sponsored training, in which participation is slanted particularly strongly toward young people (figure 1). Participation in employer-sponsored training, by contrast, remains substantial amongst prime age adults. It even rises in some countries, including the US and Japan, during the first half of the working life (figure 2).

The reasons for the difference in the age-distributions of the two types of training need be only touched on here. The rapid decline of participation with age in self-sponsored training corresponds directly to the predictions of human capital analysis of individual wealth-maximization across the life cycle. The slower decline (and even, in some countries, the initial increase) in employer-sponsored training reflects the decline in quit rates with age and seniority, and the motivational benefits of relating training to promotions and transfers within employer-based career trajectories. Labour market structure may play a part too. Occupational labour markets, geared to the acquisition by the individual of the qualifications necessary for entry, require the concentration of learning at the front end of the working life, as in vocational education and apprenticeship. Internal labour markets encourage the progressive and delayed accumulation of employer-specific skills along promotion ladders, as part of limiting and protecting the employer's investment in skills (Marsden and Ryan 1991; Ryan 1993).

A potential drawback with employer-sponsored training is inequality of access by occupation and prior skill. Employers slant its availability toward more skilled and senior employees in higher occupational categories (managers, professionals, technicians). Little is available to low skilled and low paid adult employees. Indeed, many low paying firms actively restrict employee access to training in order to reduce turnover costs (Ryan 1984, 1991; Keep 1997; Rainbird 2000). At the same time, inequality of participation in adult learning by prior attainment is probably even greater in self-sponsorship than in employer-sponsorship, given that the finance and risk-related burdens involved in training the low skilled are likely to be heavier for individuals than for employers.

Given the difference in their participation patterns, which form of sponsorship offers the better prospects for expanding individual participation in learning? In particular, does the proposed primacy of the individual make sense? How do the policies appropriate to the task differ by type of sponsorship?

The potential merits of the employer and the individual as sponsors of adult learning depend on the objective. For an increase in overall participation rates, the question remains open. The dominance of adult employees' learning by employer sponsorship in most countries probably makes it the more promising route to expansion: a given proportional increase implies much more training in absolute terms than under self-sponsorship. In terms of increased participation by prime age and older adults, employer sponsorship

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appears distinctly the more appealing, given its less youth-biased age-structure of participation. For increases in participation by disadvantaged adults, neither looks directly promising, as few members of that category participate in either type of learning. Overall, however, employer sponsorship has the edge over individual sponsorship as a route to increased participation in adult learning, both overall and across the life cycle.

### Policy toward individual sponsorship

The policies that might raise participation differ along the two routes, reflecting the difference in financial attributes and availability of training. Taking individual sponsorship first, the fact that it is discouraged by the high cost and risk of the investment points towards public support, through funding and information, intended to reduce costs and risks to individuals.

The lifelong learning agenda seeks to redirect public policy in that direction. In terms of funding, British Governments have during the past fifteen years introduced three programmes that subsidize self-sponsorship, including subsidised loans, tax-deductibility for course fees and voucher-type public contributions to individual learning accounts (box 1). All of these programmes channelled public support for adult learning through the hands of individuals, whose responsibility it was to decide what learning to undertake.

The most striking policy innovation is the Individual Learning Account, which individuals hold in their own names with a public agency, to which they and government, and optionally employers, make contributions, to be used to pay fees for learning services. As such, ILAs constitute a partial voucher system (box 4), part of a wider policy of encouraging individuals to save and invest more, through tax-free savings accounts and personal pension funds, divorced from employer involvement.

#### Box 4. Individual learning accounts in Britain

ILAs, introduced in mid-2000, held in the name of an employed adult (age 19+) funds to be used to pay for approved learning activities, general or vocational. The Government contributed an initial £150 to each account, the individual at least £25. Employer contributions were invited as well, to be treated as a non-taxable fringe benefit for the employee, and a tax-deductible outlay by the employer (as long as all employees were made eligible to benefit). A discount of 20 per cent (80 per cent, for IT-related learning) was offered on course fees out the first £500 of spending from an account. At least one in ten ILAs was to involve a priority learner category (skill shortages, SMEs, the unskilled and non-employee returners to work).

ILAs performed well in volume terms: 2.5m accounts were opened during the first year, as against 1m expected. Nevertheless, the Government suspended the programme as of November 2001, citing evidence of the fraudulent use of ILAs by training providers to fund low quality courses irrelevant to individual needs. and even to milk public funds without providing any learning services at all. The Government's explanatory letter to account holders referred to "aggressive mis-selling.. (of).. low value, poor quality learning" by providers who "may not have your interests at heart". Informed comment suggested two other factors: participation was slanted towards the highly skilled and qualified, most of whom would have undertaken the training anyway, and the high demand on public spending. No plans have yet been announced for the replacement of this central plank in the Government's lifelong learning policies.

Source: Greany (2000a), Hillage et al. (2000), DfES letter, 29.10.01; Financial Times, 25.10. and 24.11.01

The second role for government in Britain in support of individual sponsorship is to lessen the informational problems facing individuals, concerning methods and benefits of learning. Advice and guidance are provided through a national service, "learndirect", making use of information and telecommunications technology. Its services are available nationally by telephone help line and Internet for nearly 100 hours a week.

These policies to support self-sponsorship have run into difficulty. ILAs themselves lasted for little more than a year. Evidence of high deadweight, low participation by the disadvantaged and budget overruns all caused unease. Closure was precipitated by

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evidence of fraud, permitted by lax regulation of learning providers (section 3.4 below). Moreover, guidance services implicitly failed to work. Advice offered from afar by “learnirect” counsellors did not inform individuals effectively enough to deter abuse. The in-depth and in-person guidance that might have done so remains the preserve of young people and the unemployed. The problem is not specific to Britain: guidance services for disadvantaged adults in four other European countries show similar weaknesses, particularly relative to services for youth (Clayton et al., 1999).

The early suspension of ILAs has been a major setback for the individualising tendency in lifelong learning policy. The damage is magnified by the fact that the ILA programme had displaced at its introduction the previous policy of income tax relief for course fees. Training Tax Credits had at least offered large rebates (of up to two-fifths of fees, according to marginal tax rate) to individuals taking learning programmes that aimed higher than the limited learning that could be funded out of the £175 (\$260) that constituted the typical maximum under ILAs.

ILAs would have done more to promote self-sponsorship had they been offered only to unqualified and low income individuals, and had quality requirements been imposed on providers and learning packages.

Even then, widespread indifference and hostility toward learning would still remain to be tackled. British surveys find that between one-eighth and one-third of adults are either “switched off” from or “personally uninterested” in learning (DfEE 1997; Hillage et al. 2000; UFI 2001). Amongst eleven countries, only in Australia do most adult non-learners state that they would like to learn were there no obstacles in their way. Elsewhere, only one-sixth to one-third of non-learners fall into that category (OECD 1998: 220).

Negative attitudes to further learning are strongly associated with low social status and educational achievement, and hostile peer group culture. The group that lifelong learning advocates most want to draw into learning, primarily on equity grounds, is the least interested in sponsoring its own learning. Two glimmers of hope remain. One is that the diffusion of IT-based learning will change non-learners’ attitudes (section 3.3 below). Another is that employer sponsorship might be increased.

### Policy toward employer sponsorship

As individual sponsorship is difficult to expand, particularly among prime age disadvantaged adults, the emphasis that lifelong learning policies place on it is questionable – and is indeed questioned by some European Governments (CEDEFOP 2002). Policies to promote employer sponsorship may do more for individuals. Non-learners are more likely to engage in learning if encouraged and supported by an employer (Hillage et al 2000). Employer sponsored learning can of course also benefit employers themselves, many of whom under-invest in flexible production and employee learning (section 3.1 above).

British policy is circumscribed by voluntarist politics, including an “employer led” training policy. The Government limits its efforts to general support under the Investors in People programme for the development of the human resource management systems geared to the acquisition of ISO9000 and similar awards. Less than one in five employers has qualified under IiP more than a decade after the programme’s introduction. Employers are also encouraged to cooperate at sectoral and local levels to develop training programmes, qualifications and facilities. Beyond that, subsidies for training loans for small businesses, workplace learning centres and the work-based training of young and unemployed workers effectively complete the picture. It amounts to an unimpressive stance toward employer training, given that British employers tend to demand less skill

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than they need, and to train fewer skilled workers than they demand (Prais 1995; Keep 1999; DfEE 2000).

A policy more focused on the employer might generate more mileage for lifelong learning. Employer responsibilities for employee learning are publicly emphasised in France, Germany, Spain, Portugal and Belgium (ECOTEC 2000). France has adopted employee rights to educational leave and tax/levy incentives to employers to provide training.

Employee take-up of educational leave in France has however proved low, discouraged by its cost, in terms of foregone income, and by fear of employer disfavour and possibly job loss as a result. Learning leave becomes more attractive to the individual employee when any loss of income or leisure is cushioned by financial support, whether from employer or public funds. Employer tuition assistance programmes constitute a first step, as in many larger US companies. Paid learning leave constitutes a second, bigger step – one that was endorsed by ILO Convention in 1974. Learning “on company time” is a legal requirement for apprentices in Germany and elsewhere. Paid leave entitlements have been introduced in Germany, Italy, Sweden and Austria, but otherwise remain rare (*ibid.*; Levin and Schütze 1983). The only comparable provision in Britain is a right for unqualified 16-17-year-old employees – a rare species nowadays – to part-time paid learning leave. Young workers must however request their employers to give them the leave, and few are expected to do so.

France’s training tax, levied on employers at the rate of 1.5 per cent of total payrolls, is refundable for expenditures on training up to that rate. The tax rate has almost doubled since its introduction in 1971. Actual expenditures have grown more rapidly still: from 1.6 per cent to 3.3 per cent of payrolls during 1974-95. Only a minority of employers, mostly smaller ones, nowadays opts to pay the tax, in part or whole, rather than provide training. The tax may therefore have induced employers to increase training. At the same time, even if it has done that, it has distorted training provision. Informal training, the cost of which cannot be set against the tax, has been discouraged in favour of formal training, even though for many purposes informal learning may be superior. Moreover, as the employer remains free to decide how to allocate training amongst employees, the familiar bias of participation towards higher occupational categories and already skilled individuals remains. A more encouraging feature, from a lifelong learning perspective, is that inequality of participation amongst employees declines as the rate of employer spending on training rises (Berton et al. 1991; Aventur and Hanchane 1999; Fournier et al. 2001; Béret and Dupray 2001).

A further promising way of increasing the employer contribution to lifelong learning might be to require employers to provide paid training leave to all employees. A general entitlement to five days leave a year is widely mooted by British unions (section 4 below). Alternatively, employers might be made responsible for the attainment by all employees of some minimum skill level, vocational or general (Oosterbeck 1998). In Britain the latter criterion might be pitched at a Level 2 National Vocational Qualification, and a basic or key skills qualification at the same level. Such employer-focused requirements would also reduce the gulf between employer and individual sponsorship by maintaining the importance of the individual, as prospective holder of the qualifications involved, whilst expanding the role of qualifications under employer sponsorship.

In sum, the emphasis in lifelong learning upon the individual rather than the employer has been overdone. An expansion of employer-sponsorship may offer more to the cause than one in self-sponsorship, desirable though the latter would be. The preoccupation with the individual and the associated implicit exoneration of the employer in much lifelong learning discourse may indeed be a “political cop-out” (Coffield 1997). It is also an economic deficiency.

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### 3.3. Innovations in learning content and methods

Advocates of lifelong learning often set great store by changes in the content and methods of learning. Three attributes stand out: vocationalism, new learning technologies and market-oriented organization.

#### Vocationalism

The current era has seen a shift in public learning priorities from the liberal, general and development toward the instrumental and vocational. The lifelong learning agenda fuses two antecedents that functioned in largely separate spheres: adult education, with its humanistic goals, and adult training, with its work-related ones (Levin 1998). In the merger, the former has come off worse. Its orientation towards easy-paced, uncertified learning in the humanities and the social sciences has given way to an emphasis on certified skills in vocationally relevant areas.

In Britain, the change was signalled by a government proposal in 1991 to limit public funding to “useful” learning. Public funding of further education colleges was accordingly refocused on courses and qualifications contributing to the pursuit of the National Learning Targets. Individuals who wished to follow liberal studies were to be treated as consumers rather than potential producers, and expected to pay for their studies themselves. Things have since become less extreme. The current Government favours a broader concept of learning, citing the contribution of learning “for its own sake” to a “civilized society”, to “the spiritual side of our lives” and to “active citizenship” (DfEE 1998a; Hillage et al. 2000). At the same time, the priority attached to “employability” points to an enduring vocationalist emphasis.

The promotion of vocational learning has involved qualifications as well as finance. Britain has developed a structure of National Vocational Qualifications in support of work-based learning. NVQs accredit work-related competences rather than general or academic knowledge, and are geared particularly to skills learned informally and experientially at work. Employer representatives determine the content of NVQs. Employers are encouraged to offer them to their employees. Government makes them a requirement for public support in work-based learning. Similarly, in initial learning, vocational qualifications have been developed during the past decade for full time study at upper-secondary and tertiary levels.

The emphasis on vocational learning and certification has some benefits for lifelong learning. The prospect of improved career prospects encourages individuals to continue learning while young and to restart learning when adult. Many young people have been induced to complete upper-secondary education, notably in France, Sweden and Germany, by vocational programmes that combine technical education with practical skills. The certification of prior learning by NVQs in Britain has helped to increase the confidence and aspirations of many adult workers who have had no formal engagement in learning.

The drawbacks of vocationalism include the potential for low status and quality in full-time learning, and the difficulty of ensuring certification of work-based learning. In school-based learning, traditional vocational education, with its emphasis on practical skills rather than technical education, lingers on in many countries. Its low status and dead end attributes make it the enemy rather than the ally of lifelong learning.

In work-based learning, many employers, including even some that have installed flexible production systems, avoid offering skill certification. Their aversion to certification reflects partly the cost, partly adverse implications for labour turnover, and partly the external constraints on their training practices that invariably accompany certification. When employers go along with certification, e.g. as a condition for receiving

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public training subsidies, the relevant learning often lacks breadth or depth. The developmental objectives of lifelong learning, including learning for its own sake, are then marginalized by the emphasis on practical, useful skills and simple work experience (Ryan 1994, 1995).

Another potential casualty of the trend toward vocational skills is the informal, self-taught and uncertified learning traditionally undertaken by working class men, much of it focused on local politics and history, and now largely vanished (Méhaut and Clement 1989; Ryan 1995; Prais 1995; Gorard et al. 1999; Rose 2000).

The vocationalist tendency in adult learning is therefore welcome as a way of drawing people into learning, but often this benefit comes at a cost in terms of the personal development that was the aspiration, if not always the achievement, of its less instrumental predecessors.

## Learning methods

Advocates of lifelong learning often depict the potential of new learning technologies in revolutionary terms. Interest focuses on distance and interactive learning, based upon telecommunications and computers. In some accounts, these technologies will usher in an era of high-participation, informal and decentralised learning, reflecting their accessibility and appeal to individuals averse to traditional classroom-based learning. Moreover, to the extent that they increase economies of scale into learning, associated with the mass utilization of particular learning packages, the unit cost of learning falls, promising a politically appealing mix of high participation and limited demands on public spending.

The leading innovations in learning methods associated with lifelong learning in Britain are the University for Industry (Ufi), charged with “stimulating innovative modes of provision ... responsive to people’s needs”, and “learndirect”, the telephone-based and Internet-based advice service that promotes the Ufi’s services, amongst others. Around four-fifths of Ufi offerings are provided online. The intention is increased flexibility: that individuals be able to learn what they want, where they want, when they want, and at a pace more suited to their personal requirements than has been the case under institutionalised teaching. The British Government envisages mass utilization of 800 new IT-based learning centres, located in such non-traditional environments as shopping centres and sports clubs, in addition to libraries, workplaces and homes. “The Ufi will build on and extend the use of interactive learning, terrestrial, satellite and digital television and the broader opportunities of technology to widen access to learning” (DfEE 1999a: 46).

The change of orientation is again reflected in the terminology. “Learning” embraces all skill acquisition, including the purely self-guided. “Recurrent education” and “adult training” emphasised formal instruction by teachers and trainers, and suggested an institutionalization of learning that advocates of lifelong learning wish to avoid.

Much of this agenda is of course not new. Correspondence courses flourished in a niche market throughout the last century. The importance of informal learning on the job, including unguided learning by experience, has long been recognised by economists (Mincer 1974). Distance learning in higher education has three decades of success to its credit: Britain’s TV-based Open University and its equivalents in other countries, particularly the Netherlands and Belgium, have enrolled large numbers of adult learners, many of whom would otherwise have not participated. Indeed, the British Government hopes that Ufi will repeat among under-qualified adults the successes achieved by the Open University among the already qualified.

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Innovations such as UfI and “learndirect” are too recent for their contributions to have been evaluated empirically as yet. There is already evidence that IT-based learning in non-traditional learning locations, such as learning centres on industrial estates, can, particularly if well resourced and supported by employers, draw significant numbers of low achievers and non-learners back to learning (Lewis 2000; Devins et al. 2001).

At the same time, excessive expectations are often placed on new learning technologies, reflecting the political appeal of the “technological fix”. The merits of open and distance learning relative to conventional methods are still disputed (Calder and McCollum 1998). The British Government’s vision of widespread individualised, self-directed learning in shopping centres and sports clubs may involve an uncritical wish to generalise the successes of the Internet café. It faces three obstacles: the ill-informed state of many potential learners, the distractions of consumer society, and the interpersonal dimensions of learning.

Firstly, the individual learner, as potential user of information technologies, faces a vast array of learning options, in terms of both content and methods. Finding the right “learning package” amidst the contemporary proliferation is no easy task. Charities that help disadvantaged individuals back into learning and work typically provide personal and intensive guidance services. Such services are costly. The “learndirect” service, more economically, relies on one-off, distant and largely impersonal interactions, and cannot be expected to provide a service of comparable quality. There is a distinct possibility that it and the UfI will prove as marginal a contribution to national learning activities as did their 1980s predecessor, the Open College, upon which similarly high hopes of stimulating learning amongst low skilled adults were placed, but which failed to draw substantial custom from traditional institutions and methods (Nicholson 1999). The failure of the ILA programme has already pointed to the inadequacy of the guidance services enjoyed by its clientele of adult learners (box 4, above).

Secondly, the technology-driven vision downplays power of mass consumption culture to divert individuals from learning to entertainment. Thus British Government’s occasional wishful insertion of “pubs” alongside shops and clubs in the list of prospective learning venues for distance learning unwittingly points up the problem. Computer terminals in pubs compete with games machines and alcohol, and are more likely to be used themselves for games, pornography, etc., than for any officially encouraged learning. Indeed, the British Government’s attempts to promote learning as a lifestyle activity and fun play into that possibility, ignoring the hard work and anxiety that frequently accompany real learning, and encouraging a view of learning as entertainment. The trivialization of learning complements other social trends, including the growth of “infotainment” television, with its pandering to viewer desires and fears in its choice of topic and method. Any “learning society” that materializes along such lines would not merit the name.

Thirdly, the individualised, isolated image of learning may well correspond to the needs of some individuals, but interaction with a teacher and fellow learners is valued by most people, for both enjoyment and effectiveness in learning. Traditional classroom education and training recognise the importance of such factors, in principle at least. Within distance learning, the success of the Open University reflects its incorporation of personal interaction with teachers and peers, through tutorials and summer schools, alongside televised instruction and correspondence-based assignments. The success of workplace learning centres, with their emphasis on computerised learning, similarly depends on the presence of helpful experts (Devins et al. 2001). The UfI and “learndirect” promise their users “easy access to specialist support” and being “put in touch with other people studying similar topics”, but it is doubtful that they will be able to honour those promises with the resources available and the techniques they have adopted (UfI 2001).

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Some deficiencies have also been identified in distance and open learning methods, including a tendency for dropping out to rise when learning is self-paced and little personal support is provided (Calder and McCollum 1998). The enduring appeal of traditional instruction methods is suggested by the fact that in most countries at least three in four courses of adult education and training taken during 1994-1995, when distance learning technologies had already come a good way, comprised classroom instruction, seminars or workshops (OECD 1998: 220).

More balanced reactions to new learning technologies are of course possible. Besides the Open University, the successful blending of the old and the new in learning methods is exemplified by workplace courses for production workers in Ireland (box 5).

**Box 5. New learning methods: Cork Institute of Technology, Ireland**

The college provides to production workers in local electronics and chemicals/pharmaceuticals firms a flexible programme of technician-level courses. Learning methods involve: workplace-based instruction and assessment; use of information and communications technologies to promote open learning; timing to suit shift workers; credit accumulation; allowance for prior learning; and acquisition of the relevant National Certificate. The employer contributes learning facilities and time off for study, and repays between one half and all course fees for successful employee participants. The courses are rated highly by participants; attrition and pass rates proved markedly superior to those in college-based provision, which many participants would not have been able or willing to undertake. Collaborative, group-based learning has remained central.

Source: Lewis (2000)

## Market-oriented organization

The development of the lifelong learning agenda has been accompanied by the widespread reorganization of public services. Some countries, notably the US, Britain and the Netherlands, use market forces extensively to bring together the demand for and supply of learning, in contrast to their prior reliance on hierarchical administration and educational institutions. Again, the tendency is neither new nor limited to lifelong learning, but it has been encouraged by lifelong learning.

The learning system that has emerged in modern Britain may be termed a quasi-market (LeGrand and Bartlett 1993). Government continues to provide much of the funding, particularly for learning by young workers and the unemployed. The Learning and Skills Council coordinates, at both national and local levels, public funding of post-16 learning. Learning services are supplied by a wide range of “providers”, private as well as public, for-profit as well as non-profit, purveyors of distance as well as on-site learning. For-profit commercial providers dominate in some fields, particularly job-related training. The erstwhile monopoly providers of further and continuing education, viz., further education colleges, must now compete with commercial rivals for the custom of learners.

The emphasis on economic incentives and competition has generated benefits. The prospective gains include an increase in efficiency, through greater cost reduction and faster innovation. That in turn increases the volume of learning “events” that can be sustained without increasing public spending. The downside has however been neglected. As the quality of education and training services is difficult for both customers and public officials to measure, the combination of the profit motive and contract-based procurement encourages learning providers to reduce service quality. Recurrent evidence of low quality in public training programmes reflects the problem. It has been attacked by the external inspection of service quality, linked to the threat of sanctions for unacceptable performance. But the informational problems that frustrate contract enforcement also impair inspection as a source of quality control.

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The problem is ironically most acute amongst providers of the impersonal distance learning upon which the British Government stakes such hope. The new technologies that they use to market and deliver their services also help them to evade public regulation of their activities.

The hierarchical public organizations that traditionally provided most adult education and formal training did indeed prove inefficient in various ways, including low work rates, slow innovation and limited adaptability of services to client needs. Their emphasis on professional commitment and public service, rather than profits and performance bonuses, did however put a floor to service quality, for which no satisfactory alternative has been devised by the contemporary market-oriented approach (Ryan and Unwin 2001).

Such quality problems proved central to the early demise of Individual Learning Accounts in Britain (box 4). The immediate difficulty was outright fraud: some providers used their access to the ILA online database to collect account numbers and charge the Government for non-existent learning services. Behind that was evidence of the widespread selling of irrelevant and low quality learning by other providers. Similar difficulties can be expected to characterise the University for Industry. The problems thrown up by a regional Ufi pilot programme included weak quality assurance, in the face of a proliferation of learning providers and packages, lack of accreditation of providers and packages, and the aggressive marketing of learning packages (Morris 1999; Boyer 1998).

These problems arise also, albeit less dramatically, in other countries. In Germany, although initial training is regulated by public agency and its educational component is still provided by specialist colleges, adult learning is largely left to market forces. The resulting proliferation of packages and providers has again been associated with quality problems, in terms of unqualified and unprofessional staff, and uneven quality in and limited certification of learning. Sauter (1996) advocates regulation of the sector, along both consumer protection and social partnership lines – particularly in distance learning, where the deficiencies are most marked.

The problem of ensuring the quality of learning services when organization relies on market forces leads some governments to view warily proposals for individually mediated support along ILA lines. The French Government considers such an approach acceptable only within a framework of collective agreements, and with effective public guarantees of funding, quality and portability (CEDEFOP 2001: 22).

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## 4. Trade unions and partnership

Trade unionism has much to offer lifelong learning. The list of potential contributions starts with the expansion of adult learning at work. The expansion of employee learning opportunities is nowadays a leading negotiating objective for many unions. The rising profile of training in the union movement reflects the declining power of unions to influence pay and employment, and the growth of a managerial unionism that sells itself to workers by offering them specific benefits. Government interest in adult learning and evidence of the benefits of innovative work organization also encourage unions to emphasize employee training. Union interest is motivated also by procedural considerations: influence over training may involve formal partnership, giving union officials consultation rights and even governance rights (Streeck 1992; Heery 1996; Forrester and Payne 1999).

Secondly, unions potentially contribute to equity goals in lifelong learning as a result of their concerns over unequal access to learning at work, a widely criticized aspect of employer-sponsored training (section 3.1 above). Unions frequently call for universal employee access to learning at work, whether on the job, at workplace learning centres or in supported external courses. In Britain the demand commonly takes the form of an entitlement to five days paid leave a year for learning purposes (Forrester and Payne 1999).

The third potential union contribution to lifelong learning concerns their particular influence over participation in learning. Union representatives are typically better placed than employers, educators, trainers or government officials to win the trust of employed non-learners and coax them towards learning. One union official claims that “people do tend to trust us... we are the interface: we do not represent the company, we do not represent a threat ...” (Clough 2001: 9). Some notable learning developments in British workplaces would probably not have occurred without union involvement (box 6).

Fourthly, unions increasingly provide learning facilities and courses for use by members, some in conjunction with established colleges and universities. A generation ago only a couple of British unions offered substantial internal training services to members. Nowadays several large unions do so, typically emphasizing basic skills and workplace representative skills (box 6).

### Box 6. Trade union promotion of adult learning in Britain

GMB workplace representatives at a BICC Cable manufacturing plant encourage employees to make use of an on-site learning centre set up by the company for out-of-hours employee use, primarily for learning basic skills and IT skills, using self-study packages. Union representatives counter reluctance to participate amongst employees, particularly those with limited basic skills, by encouraging exploration and participation. The result has been a rapid increase in usage before and after work.

GMB lay officials in a regional group of Birdseye Walls factories have helped the employer to develop learning facilities, including workplace learning centres and college courses, offered in a range of subjects and at convenient times. Union officials report extensive employee participation and a major increase in internal applications for posted job vacancies.

UNISON, the largest UK public sector union, has negotiated employee rights to training leave with a range of public bodies, encourages members' participation through its Return to Learn programme, and provides a range of learning opportunities to members through its own Open College. Participants are disproportionately unqualified, low paid and female. Some participants report that involvement in learning has altered their attitudes to life. Membership participation in the workings of the union itself appears to have been increased as well.

Source: Labour Research (1999: 20); Clough (2001: 9); Munro and Rainbird (2000).

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Finally, unions may act as an antidote to the tendency of some employers and many providers in commercialised adult learning systems (such as in contemporary Britain) to sponsor or provide low-quality learning. The potential benefits of union involvement for quality are recognised in Europe in the joint governance of apprenticeship training (Streeck et al. 1987; Ryan 1994). Similar benefits might be expected for adult learning.

But how much influence do unions actually exert in practice? The evidence suggests an appreciable amount. Statistically, unionization is positively associated in Britain with training activity. Significant relationships are found across both individuals and workplaces, and for both the incidence and duration of training. The positive union effect on training at work requires, in both Australian and British evidence, active union organization at the workplace, not simply membership presence. Many British unions have negotiated partnership agreements with particular employers, under which the employer provides some guarantees of job security and access to training, in return for employees' acceptance of flexible working and retraining (Green et al. 1999; Kennedy et al. 1994; Heyes and Stuart 1998; Forrester and Payne 1999).

Any inference of widespread union influence is however dubious, for Britain at least. The statistical union effects on the incidence and duration of training are moderately large (around one-third) but they may be spurious, caused by other, unobserved attributes of individuals and employers that make them more likely both to undertake training and to belong to or recognise a union respectively. Similarly, partnership agreements often represent in Britain the union rubber-stamping of company human resource policies after some upheaval, often including extensive layoffs, rather than any genuine union influence on management action (Forrester and Payne 1999).

Union influence on training also has been curbed by declines in almost all economies in membership density and bargaining coverage, which have left a rising share of employees without any means of benefiting directly from unions' interest in training. Coverage is particularly low in SMEs, where employer-sponsored training is least extensive, and the potential benefit of union influence correspondingly great. Even when a union is present at the workplace, its ability to influence management is often curbed by competition in product and financial markets. If the acid test of union influence is the provision of rights to learning on company time, whether in on-the-job training or as paid training leave, such achievements appear in Britain to be limited largely to the shrinking public sector (Munro and Rainbird 2000).

That may however be changing. Union support for lifelong learning may become more effective if given government support, and moves in that direction have been made recently in Britain. Unions now have the right, when recognised at a workplace, to the appointment of Union Learning Representatives, charged with promoting employee learning. The Union Learning Fund gives public funds to unions for projects that support members' learning – including the training of their own learning representatives.

These initiatives have already contributed to specific successes in the lifelong learning area (e.g. box 6). Their contribution has however been weakened by lack of employer support, and lack of powers for learning representatives to get around that obstacle. One in two learning representatives receives no time off to perform his or her duties. Only one in two (unionized) employers allows employees to consult a learning representative on company time. Most learning representatives function also as general workplace representatives, involved in grievance, disciplinary and other issues; the task of supporting learning is then additional to those duties. Factoring in the preponderance of non-union workplaces, it appears that learning representatives had by the year 2000 given advice to less than 2 per cent of all employees (Clough 2001).

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Greater external support for union promotion of work-based learning therefore appears desirable in Britain. The employee rights to paid time off for which the Trades Union Congress calls would cover not only individual employee learning, but also the activities of learning representatives in support thereof (TUC 1998; Monks 2000; Labour Research 2000).

Finally, there is partnership: the formal involvement of union representatives in discussions of training with employers, and possibly other interested parties. The British Government's advocacy of partnership contains two strands: one-off, voluntary union-employer partnership agreements, and Local Learning Partnerships, in which representatives of government, central and local, and learning providers cooperatively coordinate local training provision. The former variant gives unions no more powers than the individual employer sees fit to accord them. The latter need not involve employee representatives at all.

The more substantial concept is social partnership, i.e., formal regulation by joint bodies representing employers and employees, and, in some cases, government and learning providers as well. Unions exert influence over apprenticeship training in Germany through such institutions. Joint regulation could be extended to cover adult learning as well. The case has been advanced for Germany, as a response to the weak position of the individual learner, faced by a welter of unaccredited learning products of variable quality (section 3.3 above). The political prospects for such a policy are however poor. Employers resist the external regulation of adult training, and have largely succeeded in doing so, even in Germany and France. Only in a few sectors do German collective agreements include clauses concerning adult training practices, such as rights to paid training leave (Streeck et al. 1987; Mahnkopf 1992).

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## 5. Conclusions

Lifelong learning boils down to three themes: a case for increased learning, particularly among less skilled adults; an individual-, technology- and market-oriented agenda for realising that goal without additional contributions by governments or employers; and a rhetoric that advocates universal learning and seeks to mobilize political support for the cause.

The case for a large further expansion in learning is paradoxical, given the unprecedented contemporary growth of youth attainments in full-time education. It does however command qualified support on both efficiency and equity grounds, and considerable support on developmental ones. The desire to reduce skill disparities within the adult population is particularly welcome, on equity and developmental grounds. Similarly, the lifelong learning agenda's emphasis on work-related and work-based learning, although it often downgrades informal and non-vocational adult learning, deserves support, as the most promising way to draw low skilled adults into learning – as long as it is matter of supplementing rather replacing liberal adult education.

The second component invites criticism. The lifelong learning cause damages the prospects for increased adult learning by its unbalanced emphasis on the role of the individual, its reluctance to tackle deficiencies in employer provision and the low quality of many “learning packages”. The prospects for quality and coherence are reduced by the excessive expectations placed on new learning technologies, and a consumerist, individualistic and isolated conception of the learner. The same applies to the enthusiasm for quasi-markets in learning, which replace the ethics of professionalized public service with the economics of marketing and profit. The early suspension of Individual Learning Accounts in the UK reflects the convergence of all three deficiencies. Too many poorly informed individuals spent too much public money on learning packages of low quality and relevance, many of which used new learning technologies, and many of which were promoted opportunistically by the less reputable commercial providers that flourish in the contemporary “training market”. Lifelong learning policies directed to the individual require government commitment to the personal guidance of the learner, and to the screening and regulation of the provider, if abuse and waste is to be avoided.

The policy emphasis should also be shifted towards the employer, even if the only objective is to serve the individual more effectively. Employer-sponsored training dominates individual-sponsored training in terms of its volume, its age distribution and (for individuals) its financial attributes, as well as its power to induce non-learners to start learning again. Employers should therefore be encouraged to increase learning opportunities for employees by some mixture of subsidies, incentives and regulation. Promising options include: the public funding of learning facilities for use by smaller enterprises; employee entitlements to learning during working hours; and minimum qualification requirements for employees. Powers for unions to promote learning at the workplace can also contribute substantially. Joint regulation of adult vocational learning can be justified by its potential contribution to the extent and quality of learning.

Finally, there is the rhetoric. The overheated, messianic advocacy – “fin de siècle foolishness” for Woodrow (1999) – that is commonplace in policy documents nowadays might be excused as required to change non-learners' perceptions of their own interests. The individuals who could gain most from learning are however those least likely to hear it: they do not read such policy documents, nor do the popular media pay much attention to them. The Government as a result preaches only to the already informed and the non-needy. Rhetorical excess actually damages lifelong learning by promoting cynicism: the listener turns down the hearing aid rather than enlisting under the banner.



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