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► Analytical framework and toolkit for the review of national lifelong learning systems

Part 1



- ▶ **Analytical framework and toolkit for the review of national lifelong learning systems**

Part 1



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Executive summary

The current document is specifically designed for policymakers interested in adopting lifelong learning as a skills strategy. The present document is the first of a two-part handbook. The first part reviews the policy framework for lifelong learning. The second is an assessment toolkit for lifelong learning policies and systems.

This framework document adopts a practitioner's perspective to explain the concept of lifelong learning policy, examine various international implementations and identify critical factors influencing policy design. It also seeks to integrate the skills strategy pillars advocated by the International Labour Organization (ILO 2023), which outline specific objectives for enhancing national skills policies. These pillars underscore the fundamental role of skills within a lifelong learning framework and their contribution to achieving socio-economic well-being, encompassing aspects of decent work, inclusivity, equality and a sustainable society.

The framework document consists of seven sections. Section 1 begins by explaining the concept of lifelong learning as a policy and its significance in addressing evolving work-skills dynamics, individual needs and social challenges in addition to the pursuit of sustainable economic growth, inclusivity and equality.

In this document, lifelong learning is defined in the following way:

Lifelong learning in its broadest and most inclusive form comprises any learning activity that takes place at any point across the lifespan and that leads to increased or enhanced understanding, skills, knowledge, application or competencies. The learning activity is engaged in to fulfil a wide range of motivations including individual, personal, work-related, community-related and societal. The activity may or may not lead to formal recognition such as qualifications.

Note that this definition is broad, reflecting the multitude of objectives within lifelong learning policies and the wide range of learning provisions that many countries have implemented. The relevant question is, therefore: How we can achieve more by building on what we have implemented?

Section 1 also examines the diverse reasons for considering lifelong learning policy. This discussion is linked to ILO's skills strategy, which emphasizes investment in capabilities, work institutions, and the promotion of decent and sustainable work.

This section further emphasizes the importance of developing a lifelong learning framework for policy, which includes governance, stakeholder involvement, financing, social inclusion, innovative learning support and skills needs. In so doing, the section's content also underscores the importance of social dialogue and tripartite cooperation in shaping a lifelong learning framework, while likewise emphasizing the need for effective coordination to achieve lifelong learning impact.

Section 2 explains how the framework document may assist lifelong learning policy design. It addresses common questions raised by policymakers about the adoption or improvement of lifelong learning in their respective countries pertaining to design practicalities such as system purpose, complexity and capacity. The section also emphasizes the need for policy and tools to be fit for purpose from each country's own perspective, and in the understanding that in most cases this requires more than finding the best off-the-shelf example.

Section 3 examines a wide range of lifelong learning activities through which individuals continually acquire and update their knowledge, skills and competencies throughout their lives. This examination intends to show that every country already has some form of lifelong learning provision, including those which rely predominantly on technical and vocational education and training (TVET), because all learning activities are part of lifelong learning. Analysing the existing learning activities helps us understand the extent to which lifelong learning elements may already be in the current system.

Section 4 explores lifelong learning through three lifelong learning models: the "core", "augmented" and "expansive" models. The models provide insight into different forms of lifelong learning policy and their respective objectives. While these models reflect different ambitions and complexities, it is important to note that they do not represent a hierarchy of from "better" to "worse". The three models reflect varying needs, policy priorities and policy intentions. In so doing, these models serve as heuristic tools, explaining the provision of various implementations.

This section goes on to explain why policy intent is the main differentiator behind the three models, stipulating that many of the policy tools can be employed by the three models, for example, levies for funding or CVET to enhance basic vocational training. The core model starts with the very foundation that nearly all the countries have established, TVET.

When the core model becomes insufficient to respond to emerging needs – for example owing to labour market changes, demographic shifts, changing economic policies and emerging new skill demands as a result of technological change – the augmented model of learning emerges. The augmented model acknowledges the need for additional learning provision beyond initial employment entry requirements. In this sense, the three models have an evolutionary overlap, often reflecting policy development instead of a drastic step change. However, as change takes place, it may reflect a significant change in the policy intent, leading to the different models we describe here.

These additional policy tools may include continuing vocational education and training (CVET) work-based learning (WBL), non-formal learning/education (NFE) and other forms of in-work learning, such as enterprise agreements that connect worker learning to productivity. Furthermore, new tools like the sector-council approach in addition to individual learning accounts (ILAs) or "learning cities", which encourage and support adult lifelong learning, may be considered. The primary objective of the augmented model is to grow the entry-based (for example TVET) learning approach to facilitate the widening demand for work-related skills, which inevitably leads to additional elements into work- and employment-related training.

The “expansive model” signifies a significant shift in policy intent. Firstly, the model establishing lifelong learning as the central organizing principle around which every element (for example, guidance, labour market support, governance, funding, institutions, stakeholders and even skills-related legislation) is configured or re-configured. There tend to be numerous goals at all levels. The distinction between personal growth, societal needs and work-related learning may become blurred, for example from linking personal growth, to work-skills all the way to national objectives. In some of these cases, the “right” to learning also features because lifelong learning is the organizing principle.

Additionally, the expansive model, with its encompassing ambition, may explicitly aim at supporting the growth of high-skilled jobs (deep-skilling) and work innovation, while at once aligning with the principles of creating opportunities for decent work, self-actualization and sustainable enterprise development advocated by the ILO.

Section 5 examines a range of policy tools that the different lifelong learning models can deploy. This range is not meant to be exhaustive, but illustrative. In particular, we would like to show that there are two types of tools to be examined. The first belongs to the category of learning delivery or activities, for example, the CVET mode of learning, work-based activities, non-formal learning methods and so on. Then there is the second type which may be described as the “enabling tools”, These are the devices that support greater utilization of learning activities, the first group of tools. Examples here may include the adoption of the individual learning account, the use of community learning centres as well as the aforementioned learning cities and sector skills councils.

Section 6 delves into examining contextual factors that can influence a lifelong learning system. The objective of this section is to assist policymakers in identifying a range of relevant issues. These factors encompass effective governance and stakeholder engagement, the socio-economic development stage of a country, levels of regulation, cultural and political considerations, funding sources and opportunities, as well as local needs, strategic goals and national vision.

The framework document concludes by reiterating that the concepts, methods and issues discussed are meant to facilitate a comprehensive review of the existing national system before utilizing the toolkit (provided in a separate document in the latter part of this handbook). The toolkit serves as a practical methodology and a resource for policymakers to assess the current state of their systems and the driving forces that shape them. It also aids in identifying policy gaps in order to progress towards the next desirable position.



1. Lifelong learning for just transitions, social inclusion and positive economic outcomes

The rapidly changing world of work is being driven by automation, technological change and new ways of working. This is leading to radical shifts in the labour market. At the same time, other critical global challenges such as climate change, conflict and humanitarian disasters pose serious threats to socio-economic development and equality. The recent COVID-19 pandemic is having a significant impact on lower-income economies, and recent evidence of a significant economic slowdown and downturn only underscores the need for action.

Developing a strong national lifelong learning (LLL) system presents an opportunity for governments, employers and individuals to take a human-centred approach to supporting workers through these shifts. This can help workers make smoother and more equitable transitions into and through the labour market. Enhancing lifelong learning policy in regard to implementation, provision and evaluation can also contribute to national economic development, greater productivity and sustainability, the creation of more decent work, improved social inclusion, and more opportunities for workers to develop their skills and take advantage of better opportunities in the workplace.

1.1. The objectives and content of the handbook

This handbook is intended to provide a practical guide for policymakers who are currently involved in building a lifelong learning policy or system, or who are responsible for making assessments and improvements to an existing system.

The handbook is organized into two parts: a policy framework and a toolkit. The policy framework provides an overview of the key elements of a lifelong learning system, and the toolkit provides practical tools and resources for policymakers.

The framework part of the handbook covers the following topics:

- Section 1: The nature, activity types and policy goals of lifelong learning
- Section 2: Reasons to have a lifelong learning policy framework
- Section 3: How to build a lifelong learning framework
- Section 4: Different models for building a lifelong learning system
- Section 5: Common policy tools for lifelong learning
- Section 6: Factors that shape a lifelong learning framework
- Section 7: Concluding remarks

To help readers understand the issues relevant to lifelong learning implementation, this handbook includes two features. First, each section of discussion is preceded by a “What you will learn” brief, which provides a quick overview of the key points and why they are important for implementation. Second, a set of review exercises is provided to support the practical aspects of the handbook, encouraging readers to reflect on the potential policy issues involved in their own country or region. We strongly encourage readers involved in policy design and implementation to take advantage of these exercises.

1.2. The nature, types of activities and policy goals of lifelong learning

What you will learn ...

1. The nature of lifelong learning in terms of its formality, types of learning activity and policy goals.
2. The role of your current skills system in relation to lifelong learning.
3. The other roles that your current training/skills system may be able to support.

1.2.1. The definition of lifelong learning

Lifelong learning can be defined in various ways. We define lifelong learning in this document as follows because of its inclusive and universal characteristics and its ability to reflect the ILO’s core mission:

Lifelong learning in its broadest and most inclusive form comprises any learning activity that takes place at any point across the lifespan and that leads to increased or enhanced understanding, skills, knowledge, application or competencies. The learning activity is engaged in to fulfil a wide range of motivations including individual, personal, work-related, community-related and societal. The activity may or may not lead to formal recognition such as qualifications.

1.2.2. Policy typology of lifelong learning activities

Lifelong learning activities can be classified into three main types:

- **Formal lifelong learning:** Structured education and training in institutions, with accreditation and defined pathways. This type of learning is typically offered by schools, colleges, technical training institutions and universities, and it leads to a formal qualification such as a certificate, diploma or degree.
- **Non-formal lifelong learning:** Semi-structured learning activity that takes place outside of formal education settings. This type of learning may include coaching, workshops, work-related discussions, learning from co-workers, online courses, community learning and self-directed learning. It is not typically accredited. Countries implementing such non-formal education activities do so with aim of assisting workers who wish to re-enter formal education and later secure better jobs.
- **Informal lifelong learning:** Learning that takes place in everyday life through experiences, interactions and observations. This type of learning is often unstructured, incidental and unplanned, but it can be just as valuable as formal or non-formal learning.

1.2.3. Variable meanings of lifelong learning

In practice, lifelong learning is an umbrella term that can be defined differently in different countries. Some countries focus more on the provision of technical and vocational education and training (TVET) systems, while others place more emphasis on work-based learning (WBL) or individual access to and funding for lifelong learning.

Therefore, the term “lifelong learning” can also be used to describe a wide range of policy objectives (Power and Maclean 2013), such as:

- To provide upskilling and reskilling of workers in order to meet the needs of the labour market.
- To improve quality of life for individuals and communities.
- To promote social inclusion and cohesion.
- To enable people to participate fully in society.

However, irrespective of specific goals, the following are some of the most common delivery methods for lifelong learning (though not limited to these):

- adult learning;
- continuing vocational education and training (CVET);
- work-based programmes;
- apprenticeships;
- training provided by sector skills councils or professional bodies.

1.2.4. Different lifelong learning policy goals

The specific objectives and delivery methods of lifelong learning will vary depending on the needs of the country or region. The following are some useful examples.

- **Lifelong learning for poverty reduction:** In Botswana, lifelong learning is used as a key tool to support the National Poverty Eradication Policy (Raditloane and Chawawa 2015). The policy has three broad components:
 - adult basic education;
 - local and community-based extension programmes;
 - vocational continuing education.

Similarly, in 2011, the Federal government of Brazil created the *Programa Nacional de Acesso ao Ensino Técnico e Emprego* (National Programme for Access to Technical Education and Employment) or PRONATEC. This training provision offered free vocational education to every Brazilian citizen in the form of short adult training courses for poverty reduction (OECD 2018).

These examples show that, while supporting employment, TVET can also deliver some of the societal goals of lifelong learning, namely reducing the level of poverty.

- **Learning as a “basic right”:** Lifelong learning is often used as a means of empowering citizens and ensuring that everyone has the opportunity to learn. In Ethiopia, for instance, lifelong learning serves as the foundation for providing education to more than 31,000 poor, mostly illiterate women who have limited skills in the informal economy (Noguchi et al. 2015). These lifelong learning programmes offer instruction in literacy, livelihood skills and rural entrepreneurship, delivered through adult education and vocational workshops.

This example illustrates a national lifelong learning policy aimed at enhancing literacy and the skills capabilities of grassroots communities. By targeting specific groups, such as poor women, these programmes help secure the basic right of those people who need it most.

- **Lifelong learning for employment opportunities active labour participation:** In Hong Kong, lifelong learning aims to support employment opportunities and active labour participation. The TVET system previously focused on young workers, but this changed when manufacturing started to relocate to Shenzhen. Thus the TVET system required reorientation to people who most needed reskilling.

A reform introduced the Employees Retraining Scheme alongside use of the Qualifications Framework to enable career development. This new provision targets people who are switching from declining industries to emerging ones (Douglas & Adamson 2018). While the retraining provision is territory- and industry-wide, the main users tend to be in two specific groups: 1) returning female homemakers and 2) workers who have experienced long-term unemployment within a declining sector. The provision now forms an important part of TVET in the territory.

- **Lifelong learning to support improvement in productivity and macro socio-economic goals:** In six large European economies (France, Germany, Italy, Spain, Sweden and the United Kingdom of Great Britain and Northern Ireland), lifelong learning is used to support reskilling and upskilling, especially in the areas of digitalization, automation and green transition. Research has shown that up to 60 per cent of productivity improvement is likely to come from greater adoption of digitalization and automation (McKinsey Global Institute 2021), forming the primary goal for training provision.

These countries built and continue their lifelong learning systems on existing TVET and formal education systems. However, unlike traditional TVET systems that focus on employment entry, these countries' TVET systems are now taking on more complex goals, such as productivity, innovation, deep-skilling, equality and the "twin transitions" (digital and green).

- **Lifelong learning for sustainable development goals:** In the Philippines, lifelong learning is supported via a network of community-based, disaster risk-prevention education programmes to reduce the vulnerability of rural and farming communities. These communities are at risk of frequent landslides during the heavy monsoon season (Noguchi et al. 2015).

Lifelong learning for this purpose is delivered via extension programmes at "at-risk" localities. These programmes focus on literacy, life skills and environmental awareness. They are not part of the existing TVET or formal education systems; however, they are an additional lifelong learning provision.

The above examples show that lifelong learning can encompass a variety of objectives depending on national, local or individual needs. Moreover, to achieve these objectives countries may adopt different modes of learning delivery.

Review exercises

1. To what extent do you agree that lifelong learning is a broad and flexible concept for supporting learning?
2. Reflecting on existing policies and provision within your country, how would you describe lifelong learning in your national context? For instance, is TVET for initial employment or more focused than that? Do bear in mind that lifelong learning may not be formally known as such, but instead may be the initial building block for a formal lifelong learning system in the future.
3. How effective is the current provision in meeting these targets and needs?

Please note that review exercises 2 and 3 – and likewise many exercises in the following sections – may reflect the approach we take in this document's toolkit meant to help you assess your country's policy position and future efforts.

1.3. Lifelong learning in the context of ILO skills strategy

What you will learn ...

1. The ILO skills pillars and what they cover.
2. How lifelong learning that links to the ILO skills pillars can deliver benefits to individuals, employers, society, and other stakeholders.
3. How to assess your current learning provision against the ILO skills pillars and identify areas for improvement in future policy planning.

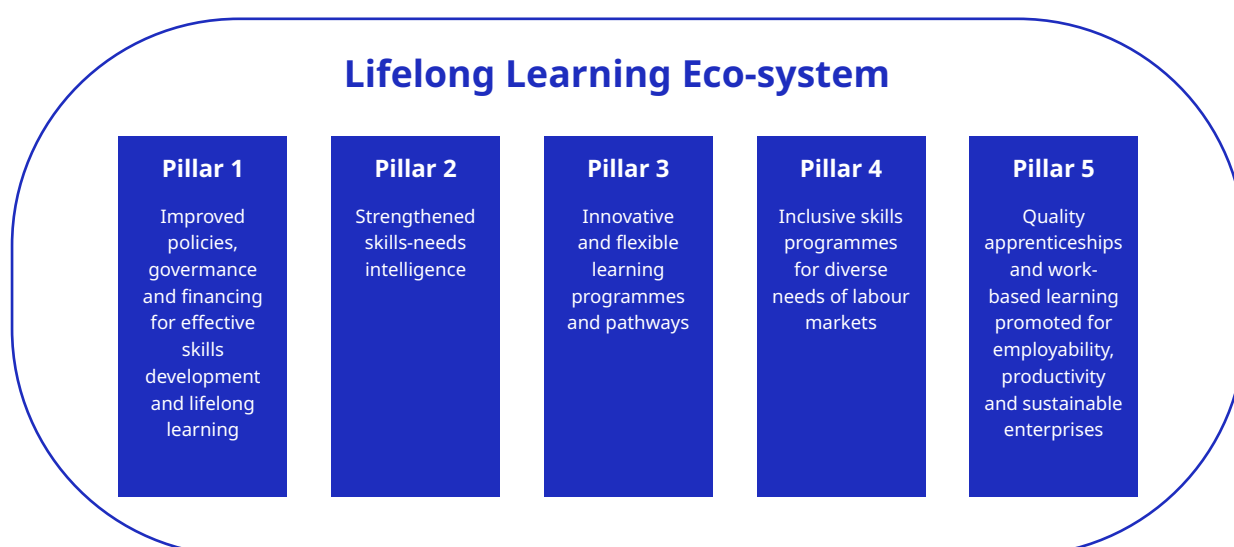
1.3.1. Lifelong learning and the ILO skills pillars

We mentioned that lifelong learning policies can use different tools. Many of these tools are consistent with ILO's "skills pillars", as depicted in Diagram 1. Therefore, when considering developing a lifelong learning policy, it is also a good opportunity to integrate elements of the learning system in line with the ILO's skills pillars.

The relationship between lifelong learning and the ILO skills strategy is expressed under five pillars as depicted in Diagram 1 (ILO 2022b: 4):

- **Pillar 1:** Improved policies, governance and financing for effective skills development and lifelong learning.
- **Pillar 2:** Strengthened skills-needs intelligence.
- **Pillar 3:** Innovative and flexible learning programmes and pathways.
- **Pillar 4:** Inclusive skills programmes for diverse needs of labour markets.
- **Pillar 5:** Quality apprenticeships and work-based learning promoted for employability, productivity and sustainable enterprises.

► **Diagram 1. The five pillars of ILO skills strategy for lifelong learning**



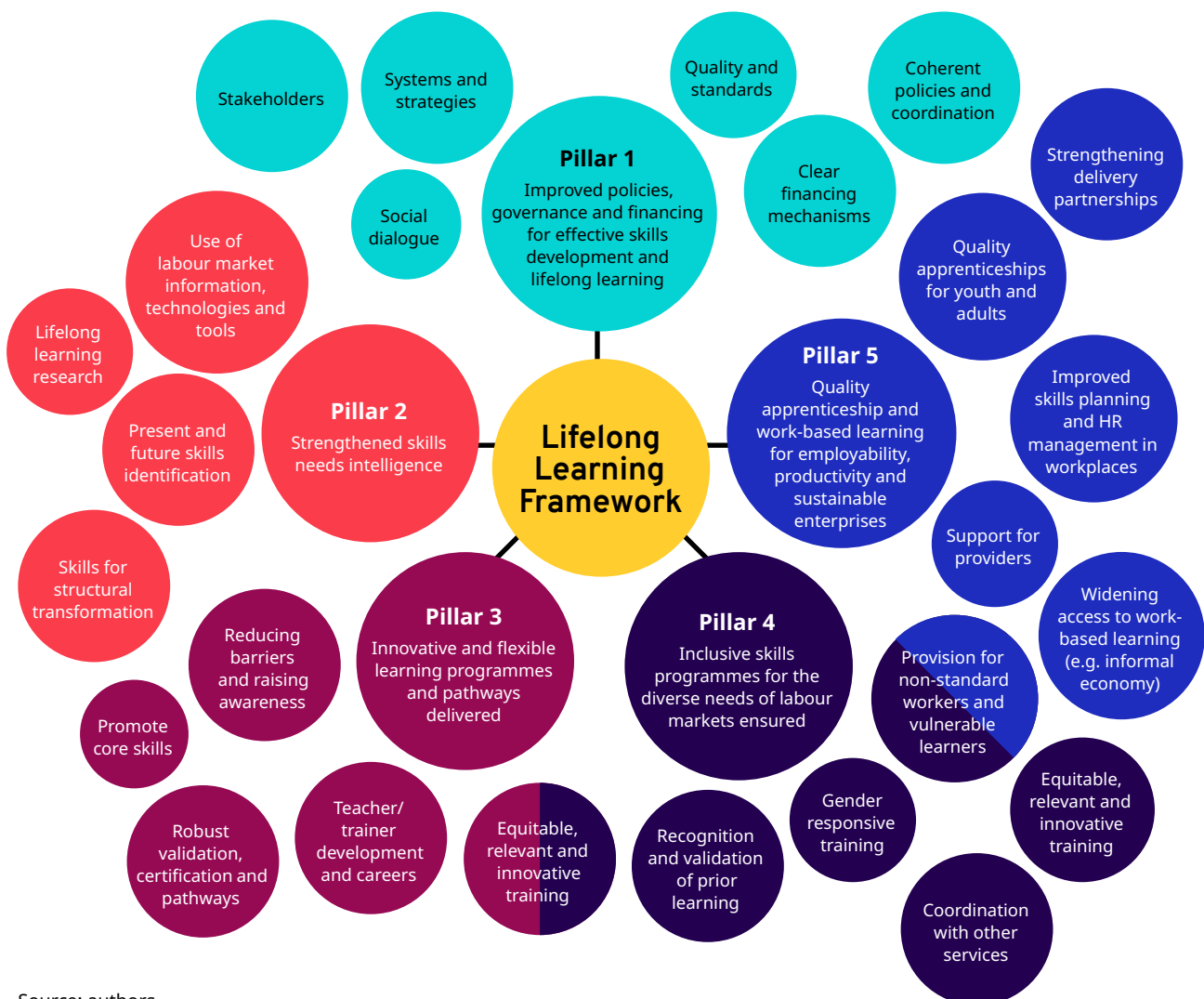
The ILO skills pillars promote a set of desirable policy objectives for lifelong learning, along with the methods to attain them. Additionally, the skills pillars are grounded in the principle of social dialogue, which encompasses collective bargaining and tripartite cooperation. This principle fosters social cohesion and a productive economy built on sustainable enterprises, encompassing both urban and rural regions. It also champions an inclusive agenda that strives to ensure that no one is left behind (ILO 2018).

Tripartite approaches that involve government, employer and worker representatives can help to engage a range of stakeholders in the identification of skills needs, the development of policies, financing, target setting and provision of lifelong learning. This ensures that the lifelong learning system incorporates the needs of different social groups and stakeholders, which in turn creates a conducive environment for a competitive and sustainable economy that offers decent work and opportunities for individuals to raise their capacity and capabilities.

1.3.2. How do the skills pillars relate to lifelong learning tools?

In Diagram 2, the ILO skills pillars are further broken down into aspects of policies and tools that make up the pillars. It is important to note that there are probably more tools in practice than what are illustrated here. The examples provided here may help to further enhance the understanding of the nature of the skills pillars and the scope of a lifelong learning system.

► **Diagram 2. Lifelong learning elements in the five pillars of skills strategy**



Source: authors

1.3.3. What does diagram 2 tell us?

Diagram 2 is not just a diagram of system and components – it also carries important messages for policy building.

- ▶ Diagram 2 shows that an effective lifelong learning policy framework should be able to incorporate a wide range of learning goals. These goals can include entering employment (for instance through TVET); job transitioning/progression; acquiring qualifications; meeting the needs of the labour market both now and in the future; and achieving socio-economic goals.
- ▶ The ILO pillars emphasize the need for effective coordination and governance. The pillars must be working together for effective outcomes to obtain.
- ▶ The ILO pillars also represent a mutually beneficial approach to lifelong learning. When workers have access to better educational, skills-development and training-related opportunities, this benefits companies, which can in turn improve their operation, upskilling and reskilling of workers while increasing productivity and harnessing skills and technology to shift up the value chain (ILO 2018; Sung et al. 2008).
- ▶ Society also benefits from lifelong learning through outcomes such as poverty reduction, family cohesion, increased individual dignity and self-fulfilment, smoothened transition from informal to formal economy work, higher levels of social and political participation, and increased contribution of workers and companies towards creating a more just and sustainable economy.

Review exercises

1. Using diagram 2, map out your country's current learning provision. This may help you see how your current learning provision compares to the ILO pillars.
2. With this identification, assess the effectiveness of your current learning provision in relation to your targeted goals so far.
3. Use the results in exercise 2 to assess possible future skills policy and/or socio-economic development plans to support a lifelong learning policy framework.

2. The need for a lifelong learning framework

What you will learn ...

1. What a lifelong learning policy framework is.
2. How a policy framework and related tools can help policymakers design a lifelong learning policy and its system.
3. That a lifelong learning policy and its system can be complex, but not every lifelong learning system has the same components. It is always a matter of fit for purpose.
4. Why external help may be needed to build internal capacity.

2.1. The difference between skills policy and lifelong learning policy

We may recall that lifelong learning is a broad concept of learning that covers all forms of learning. Therefore, it is easy to see that all skills policies are inherently part of a lifelong learning policy.

Viewing skills policies as part of lifelong learning underscores the significance of continuous learning in developing and enhancing skills. Thus, when we start a skills policy (such as a TVET policy or an apprenticeship scheme), we are also starting a lifelong learning policy, albeit this may be just the beginning.

2.1.1. Frequent questions that reflect the need for a framework as a guide

Policymakers considering the adoption or improvement of lifelong learning in their countries often ask the following questions:

- What exactly is a lifelong learning policy?
- What can lifelong learning do for my country?
- Do we have a lifelong learning policy if we do not have a formally declared one, although we currently do provide learning in a wide range of areas, especially in adult learning?
- Do we support a lifelong learning policy if we have a well-established TVET system that produces many young graduates?
- While we may be consonant with the general policy idea of lifelong learning, to what extent are lifelong learning elements (and which types) already supported by our existing skills provisioning?
- How can we enhance and expand upon our existing provision/system now that we want to tackle issues beyond entering employment?
- How can we measure progress and identify areas for improvement?
- Are there other policies we should consider in order to enhance the effectiveness of our learning provision?

To answer these questions, a lifelong learning policy framework may serve as a helpful tool.

2.1.2. What is a policy framework?

The fundamental elements that we should examine and the questions we must ask when talking about a policy framework are:

- **Vision:** What do we want to achieve with this policy framework? As a concept this is fairly long-term and broad, but at heart it indicates where we want to arrive. In the context of a lifelong learning policy framework, an example may be ensuring that all citizens have the skills they need to participate in the workforce and contribute to the economy.
- **Mission:** What are the specific goals of this policy framework? This is a short- or medium-term concept indicating what milestones to be achieved in terms of the vision. An example may be the provision of high-quality training opportunities that are accessible to all regardless of their background or circumstance. Mission and vision are therefore closely related.
- **Values:** What are the underlying principles that guide this policy framework? Values define what emphases we would like to add to the delivery of mission and vision. Good examples may include “providing lifelong learning with inclusivity” or “providing skills development that is consistent with the ‘twin transitions’”.
- **Approach:** How will we achieve the goals of this policy framework? This refers to the activities or actions required for delivering the policy goals. An example may be the adoption of a combination of public- and private-sector initiatives, including formal education and training, informal learning and apprenticeships. However, the term “approach” may also include some broader enabling elements that are vital to supporting the intended actions. For example, to achieve upskilling we may need to strengthen the provision of career development which, notably, is not a training activity.
- **Resources:** What resources will we need to implement this policy framework? To make such a determination, funding sources as well as appropriate and sustainable funding methods must be identified. Other financial factors likewise must be considered, for example, identifying ways to ensure dead-weight loss is no more than negligible.
- **Monitoring and evaluation:** How will we track the progress of this policy framework and make sure that it is achieving its goals? To be effective, a framework must have mechanisms and indicators that can provide information about progress and policy gaps.

Using the above key dimensions, we integrated the ILO skills pillars into an approach to lifelong learning and skills development (ILO 2019, 2021, 2022b) the content of which comprises both a policy framework and complementary toolkit.

2.1.3. What are the benefits of a policy framework?

The policy framework and toolkit can help policymakers in the following specific ways:

- To ascertain how the vision and mission of their skills policies are linked to a lifelong learning model.
- To understand the major elements in a lifelong learning system, including governance, institutional arrangements, financing and policy tools. Note that there is no ideal template for those elements, and they tend to vary from country to country.
- To build upon existing skills provision (for example TVET and adult learning) towards formulating a broader concept of lifelong learning. As indicated in diagram 2, there are many policy tools available. The framework will help encourage policy considerations beyond a merely TVET/adult learning system.
- To identify gaps in current lifelong learning (as well as general learning) provision and any effect such gaps have on meeting socio-economic objectives, these including matters of job transition, productivity, local economic development, improved financing methods, inclusivity and flexible learning delivery. However, these matters may be subject to expertise constraints or financial resource limitations. As a result, external advice and an internal system review may be required.
- To assess the capacity and effectiveness of the current system to meet lifelong learning expectations and support resilience and effective transitions throughout people's working lives.

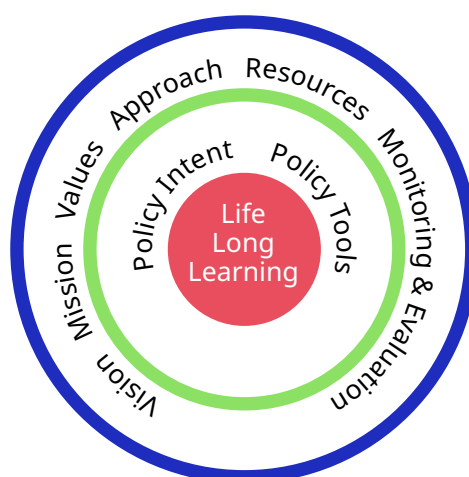
Review exercises

1. To what extent is there already a lifelong learning framework in your country?
2. To what extent is there sufficient internal knowledge within government to support policies towards lifelong learning?
3. For lifelong learning policymaking, what are the constraints (for instance those pertaining to resources, coordination, knowhow, legal matters) and opportunities (such as upcoming reviews, national planning requirements, policy focus changes) that you must be aware of?

3. Building a lifelong learning framework

A lifelong learning policy framework guides the development of a lifelong learning policy. Within a lifelong learning policy, there are broadly two sets of elements: the policy intent (deriving from notions of vision and mission) and policy tools that support all the activities and the enabling environment (see diagram 3 below).

► **Diagram 3. Lifelong learning policy framework and lifelong learning policy**



Source: authors

The pivotal element in identifying three lifelong learning models for policymaking purposes is policy intent. Policy tools, on the other hand, cannot adequately delineate a specific lifelong learning model given that most tools have applicability across various policy intentions. For instance, funding mechanisms such as training vouchers can underpin both basic TVET training provision (those intended for recipients aged 18–21, for example) and learning subsidies open to all citizens within a comprehensive lifelong learning model. The discussion on lifelong learning models will be expounded upon in Section 4.

3.1. Lifelong learning policy tools and activities

What you will learn ...

1. Why it's important to have a range of policy tools and learning activities in the skills system.
2. Policy tool and learning activity links with policy intent.
3. The different types of learning policy intent, among them narrow (such as those focusing on immediate job requirements of school-leaving youths) and broad (such as those pertaining to qualitative improvement in society).

3.1.1. Linking policy tools to policy needs

We mentioned earlier that different tools can be used irrespective of the particular policy intent (and therefore particular lifelong learning model). Thus, determining the range and types of tools and activities currently in place is a useful way to examine the match or mismatch between policy intent and skills system provision. Such determination yields several policy benefits:

- **Knowing the scale of the challenge:** For example, the rapid pace of technological advance, particularly in the area of digitalization, has resulted in a need to reskill and upskill more frequently. Policymakers must know if the current provision for entering employment and the required qualifications are still fit for purpose. If not, what needs to be done? Do we need to add new or change existing programmes, or is major reform required?
- **Putting focus on a demand-led skills system:** The previous point highlights the importance of future job changes leading to new skills demand. Often, this new demand comes from the workplace. This in turn requires close collaboration with employers, industry bodies, sector skills councils and professional bodies, as well as with qualifications authorities, standards bodies and regulatory authorities. The challenge for policymakers is to effectively integrate these elements to achieve policy goals.
- **Going beyond formal education in regard to new skills demand for individuals:** In line with formal education attainment rising globally, individual aspirations have also grown. This means that career needs, career planning and skills needs analysis for job transitions may require more and better support. Sometimes, these elements may not be seen as central to the skills strategy. However, they are “enabling” elements (or tools and activities) that make skills effective. The key point here is that when the policy intent becomes more developmental, the need for enabling elements also grows.
- **Seeing skills as a vehicle to achieve wider socio-economic goals:** We can view the range of learning activities as residing across a spectrum. At one end is job skill provision for individuals; at the other is attainment of societal or other collective goals such as equality, poverty reduction and sustainable environmental practice. As we move through the spectrum from individual to collective concerns, points along the way relating to learning activities may change and expand. Often, these activities will require novel ways of supporting learning, such as new pedagogy approaches, innovative technology/media instruction and updated assessment methods. The efforts may, moreover, require long-term planning and the creation of necessary information, governance, resource and institution components to sustain such activities.
- **Affirming skills as the basis for better jobs and moving up the value chain:** There is ample evidence that a good job is one that is often challenging and produces high job satisfaction (Judge et al. 2007; Sung and Ashton 2014). Challenging jobs also coincide with job complexity which in turn requires many or higher skills. This is another example where learning activities may evolve further when policy intent has changed. For example, if we wanted more learning support for SMEs, it would not be a matter of simply providing more training to SME workers. That could be wasteful if the business model, equipment used and work processes applied stayed the same. In fact, enhanced learning for SMEs would necessarily require helping them to improve their business practices and models in regard to management, equipment, marketing, processes, competition and other factors. Hence, learning activities may expand to cover the enabling needs.

In summary, it is important to know what policy tools and their associated activities are extant in the learning system so that a plan for improvement can be developed. Note also that in the context of our discussion, the term “policy tools” (for example IVET) is synonymous with activities. As such, changes in learning policy intent (such as new or more ambitious policy goals) may require additional or different learning activities.

Review exercises

1. Identify the reasons for the increasing variety of learning activities in your country.
2. In terms of learning support for SMEs, what kinds of learning activities are provided? For example, what are the approximate percentages of learning provision for changing/improving the business model, skills of the senior staff (including the owner), and other workers?
3. What percentages of the learning activities (or provision) are potentially linked to the following policy goals?
 - a. Workers able to do an existing job.
 - b. Finding a better job.
 - c. Reducing gender inequality.
 - d. Enabling more productive enterprises.
 - e. Achieving SDG 11 (Sustainable Cities and Communities).

3.2. Meeting diverse needs through lifelong learning activities

What you will learn ...

1. How to recognize the different types of lifelong learning activities.
2. How to identify the sources and locations of these activities. Knowledge gained from exercises 1 and 2 will help you map and plan policies for lifelong learning.

The previous section explained various reasons for having diverse types of learning activities. It is important to note that any of these learning activities can form part of the toolbox for any lifelong learning model. However, to see this more clearly, we can identify the locations of these activities. The combined aspects can then be part of the learning tools component that policymakers may consider in their lifelong learning model and plan.

Table 1 provides an overview of the various learning activities and locations pertaining to lifelong learning. In this context, the term “activity” also encompasses informal types of learning that may not have a specific structure or location. These informal sources of learning can occur naturally within different settings as a part of everyday interactions or activities. Non-formal and informal learning as they pertain to lifelong learning focus more on providing a supportive environment to create that learning location, and less on the provision of learning/training itself. For example, when cultural activity is supported at community centres, informal learning has better opportunity to be developed.

► **Table 1: Examples of sources and locations of LLL and indicative types of LLL activity**

Type of lifelong learning activity	Source/location of learning (√ = frequent source ‡ = occasional/infrequent source)						
	Primary and secondary education	Tertiary education	TVET	Adult education	Workplace training	Private providers and professional bodies	Community-based learning/ NGOs/ charities
Initial education	√	√	√	‡		√	‡
Formal education for work			√	‡	√ (e.g., apprenticeship schemes a mix of work and school-based education)	√	
General education	√	√	√ (e.g., often entry levels)		√ (e.g., work experience, internships)	√	
Training for specific skills		‡ (e.g., polytechnics, engineering)	√	√	√ (e.g., apprenticeships, mentoring, non-formal and informal learning)	√	√ (e.g., volunteering, community workshops)
Adult literacy, numeracy and computer training (basic skills)		‡		√	‡	√	‡
Leisure learning and personal interest		‡ (e.g., extramural classes)		√		‡	√
Volunteering as learning activity							√
Informal learning via interactions					√		√
Community development			√	√			√
SDGs, social initiatives (e.g., gender, inclusivity)		‡		‡			√

Source: authors

Table 1 illustrates that lifelong learning encompasses many activities and sources. The information may not be exhaustive, but it forms a useful basis for establishing the scope of learning activities relevant to your plan.

In this handbook, however, we address learning activities that are particularly relevant to the ILO skills pillars as well as other tools and activities similarly relevant to lifelong learning. For example, tools and activities under the skills pillars may include upskilling and reskilling efforts for workers, development/job transition for individuals, as well as efforts aiming to enhance employability and productivity. Those outside the skills pillars but useful to consider may include the skills for twin transition, the learning city and individual learning accounts.

It is important to note that the specific mix of tools will hinge on a country's national objectives and priorities, as well as its current socio-economic development. Oftentimes, evolving needs influence policy intent, with this in turn affecting lifelong learning models. Indeed, that circumstance is the focus of our discussion in the next section.

Review exercises

1. Use table 1 to identify the types of learning activities (row) that are inadequately provided by the sources (column) of learning in your country/region.
2. Identify the key stakeholders involved in learning activities in each of the applicable cells of table 1.
3. Assess the adequacy of funding for learning activities in the applicable cells of table 1.



4. Models for building a lifelong learning system to support employability, productivity and other objectives

To provide an analytical framework and inspiration for policymaking, we propose three models that reflect the different forms of lifelong learning policy. It is important to note that these models do not reflect a hierarchical structure in the better or worse sense; they are, rather, the result of varying needs, policy priorities and opportunities. We combine all these factors into one term – “policy intent”. This three-category model serves as a valuable tool for understanding how an initial lifelong learning system can transform into a different model as the policy intent changes.

Unlike other attempts to provide lifelong learning models (discussed later), our proposed models have fuzzy boundaries. The three models and their contents are as follows:

- **The core model** primarily uses the skills system to support employment entry.
- **The augmented model** uses the skills system to achieve objectives beyond entry purposes, such as reskilling, upskilling, tackling technological change, implementing policy innovations such as micro-credentials or RPL for more effective support, and so on. However, the employment purposes are still the basis of this model.
- **The expansive model** has an explicit policy intent to move beyond merely employment-related learning by placing focus on learning in general and its role across different levels. In most cases, this model supports any type of learning. While retaining the connection with employment needs, the policy intent of this model is to make lifelong learning an organizing principle around which skills policy and provision are developed and towards which the skills system evolves.

The boundaries between these models are not wholly distinct, for at least two reasons. Firstly, in real-world application it is uncommon to have a direct one-to-one correspondence between policy models and the actual implementation of policies. Secondly, when a policy’s intent undergoes change it is rarely the case that all previous tools are discarded and that an entirely new set of tools directly emerges. More often, policy evolution ensues. This typically entails a transition from one model to the next, a process sometimes leading to overlap and the persistence of certain policy tools despite any model shift.

4.1. The three lifelong learning models

What you will learn ...

1. The policy intent of the three lifelong learning models.
2. The function of various policy tools (such as levies, skills standards, etc.) and how they function across different models. Their inclusion relies on the fit-for-purpose rationale that supports the policy intent.

4.1.1. Previous attempts to identify lifelong learning models

Regmi (2015) reviewed a number of prior studies on lifelong learning models and concluded that the vast majority of approaches were in fact built on two foundational models: the human capital model (that is, learning as a tool for economic growth) and the humanistic model (that is, democracy, social welfare and active citizenship).

The review brought to light substantial overlap between the different models. Regmi (2015) noted that the differences between the models were “only in nomenclature” (page 134). For example, Green (2006) identified three models from the institutional-financing perspective: the neoliberal market model, the social democratic model and the social market model. Rubenson (2006) examined the “Nordic model” in which lifelong learning forms part of the welfare state concept and how Nordic institutions affect this link. Coffield (2000), working within the “learning society” research programme, identified ten lifelong learning models. These models included skills growth, personal development, learning market, social control, structural change and so on. As Regmi argues, the models in the above studies reflected researchers’ respective theoretical interests rather than propose real boundaries in a practical sense.

These studies also echo early debates under the Faure Report (Faure et al. 1972) and Delors Report (Delors et al. 1996). The former argued that achievement of a “learning society” via lifelong learning was important, and that there was need to move away from “utilitarian motives”. The latter advocated a “balanced” approach to lifelong learning, namely the four pillars of: learning “to do”, “to know”, “to be” and “to live together”.

In practice, most policies on lifelong learning may well contain mixtures of the different models, purpose in mind. The current handbook is designed to support policymakers in developing their own system that fits their own needs. Additionally, the ILO skills pillars (as depicted in diagram 1) is particularly relevant to our current effort, which might not have been the analytical lens applied in those previous studies.

Those early studies have been instrumental in providing intellectual and theoretical insights into lifelong learning models, while at once providing a better understanding of the models’ potential outcomes. Nonetheless, policymakers in other countries will encounter their own challenges. Initially, starting points may differ significantly due to factors such as institutional prerequisites, national income levels, cultural orientations and others. These factors are often intertwined with unique constraints and policy ambitions. Furthermore, most policymakers are tasked with enhancing systems that have been established throughout years of diligent work. Therefore, in most cases what is required is a method or way of understanding that allows for the evolution and improvement of current systems without giving rise to substantial policy disruptions. The three lifelong learning models we propose in sections 4.2, 4.3 and 4.4 reflect these concerns.

4.1.2. Lifelong learning models in this handbook

For policymaking, we may require models capable of enabling policymakers to identify the location of their ongoing efforts. These models must be able to support modifications in policy design as needs expand or change. Consequently, we will assess the three lifelong learning models in relation to policy intent and the options in policy tools.

Table 2 depicts the diverse policy tools used in the three lifelong learning models. You may notice that many tools are employed by more than one model; this obtains since the tools are able to deliver the policy objectives of different models. The depiction likewise reflects the transitional nature of skills policymaking we discussed previously.

The policy intent of the core model emphasizes the initial stages of work entry and skills preparation. The focus here is on academic and vocational learning, establishing pathways between them, and recognizing the synergy between theoretical learning and vocational skills. In contrast, the policy intent of the expansive model envisions lifelong learning as the central organizing principle, with many elements in the core and augmented models such as TVET, mobility support and reskilling remaining though here contributing to a wider set of objectives.

Between these models lies the “augmented model,” which maintains a specific focus on employment needs. The augmented model typically emerges subsequent to the establishment of the core model, for instance in response to a shift from basic manufacturing to higher-value products, to increased labour mobility during significant structural changes, and to the incorporation of a fast-growing service sector in the economy. While broader in scope than the entry-focused core model, the augmented model has yet to develop a robust or explicit policy focus on individual and societal goals such as that present in the expansive model. It certainly has not adopted lifelong learning as an organizing principle in constructing or reforming the skills system. As such, we may envisage that most skills systems in the world are in this category.

The three models in table 2 serve as heuristic tools, facilitating the consideration of developmental processes and tool options. It is essential to keep in mind that the tools themselves do not differentiate the models significantly. Many tools may function effectively across various models. The primary determinant is whether the tool aligns with the policy intent, as it is this intent that distinguishes the three models.

► **Table 2: The three models of lifelong learning and policy tools**

(Blank space = may not be considered ‡ = sometimes considered ✓ = often considered)

Scope and tool	Core model	Augmented model	Expansive model
Learning/skills policy focus			
General education	✓	✓	✓
TVET and apprenticeship/internship	✓	✓	✓
Tertiary education	‡	✓	✓
Continuing/adult education		‡	✓
Basic skills (literacy and numeracy)	✓	✓	‡
Work-based learning	‡	‡	‡
Community-based learning	‡	‡	‡
Early childhood education		‡	✓
Environmental, health, community learning		‡	✓

Scope and tool	Core model	Augmented model	Expansive model
Governance and institutional arrangements			
Government ministries	✓	✓	✓
Local/regional governments	✓	✓	✓
Lifelong learning/skills agency		‡	✓
Sector skills councils/bodies		‡	✓
Funding bodies	✓	✓	✓
Qualification authorities	‡	✓	✓
Standards bodies	‡	‡	✓
Employers' and workers' representatives	✓	✓	✓
Occupational, professional and interest groups		‡	✓
Financing tools			
Training levies	‡	‡	‡
Separate lifelong learning budget		‡	‡
Co-funding for programmes		‡	‡
Publicly funded training	✓	✓	✓
Individual learning account		‡	‡
Targeting of specific groups in society	‡	✓	✓
Self-financing	‡	‡	‡
Employer-funded training	✓	✓	✓
Union/NGO/community-funded training	‡	‡	‡
Key stakeholders			
Employers	✓	✓	✓
Workers' representatives	‡	✓	✓
NGOs	‡	‡	‡
Local communities	‡	‡	‡
Special interest groups		‡	✓
Training/learning providers	‡	‡	✓
Labour market linkage			
Employment facilitation		‡	✓
Career guidance		‡	✓

Scope and tool	Core model	Augmented model	Expansive model
Labour market/job information	‡	‡	√
Training/learning information	‡	‡	√
Skills intelligence (current and future)		‡	√
Other innovations			
Digital delivery for learning	‡	‡	√
Local/community learning centres	√	√	√
Learning cities		‡	‡
Learning society/active citizenship		‡	‡
Deep learning for self-development and innovation		‡	‡
Learning as a “right”			‡
Dedicated legislation for lifelong learning			‡
Learning leave			‡
Recognition for prior learning		‡	√
Micro-credentials		‡	√
Flexible learning pathway		‡	√
LLL for social cohesion and social development	‡	‡	√

Source: authors

Table 2 illustrates a toolbox approach wherein numerous policy implements have been designed for manifold purposes. However, note that the practical assessment toolkits for lifelong learning policy as part of this report have been reorganized within the ILO skills pillars rubric. The aim of such reorganization is to simplify the assessment process while at once acknowledging the need for development and improvement of current policy based on the skills pillars.

In section 4.2., we will present country examples to illustrate implementation. It is imperative not to perceive these examples as formulaic, as they are intended to demonstrate how changes in policy intent impact provision and tools. Thus, the development of lifelong learning policy can be seen as an evolutionary journey.

Review exercises
1. Acknowledging that a perfect fit might not exist, utilize table 2 to evaluate the approximate position of your country or region. 2. If Recognition for Prior Learning (RPL) is not available in your country or region, explore the potential advantages of employing this tool to promote lifelong learning. 3. Identify two tools that are equally beneficial across all three models.

4.2. The core model of lifelong learning

The core model is an excellent starting point for lifelong learning. It emphasizes the importance of providing formal education and essential skills so that learners can enter the workforce with sufficient general knowledge and vocational expertise. This model encompasses the entire spectrum of formal education, from primary and secondary to vocational and tertiary education, each of which is a crucial component of lifelong learning. Although the model is inherently entry-focused, a significant feature is its support of primarily young people who receive both intellectual and vocational education.

The core model is a priority in countries with large numbers of people entering the labour market. It is equally essential in countries with limited funding for training. In both cases, the core model serves as the fundamental focus towards ensuring national socio-economic development.

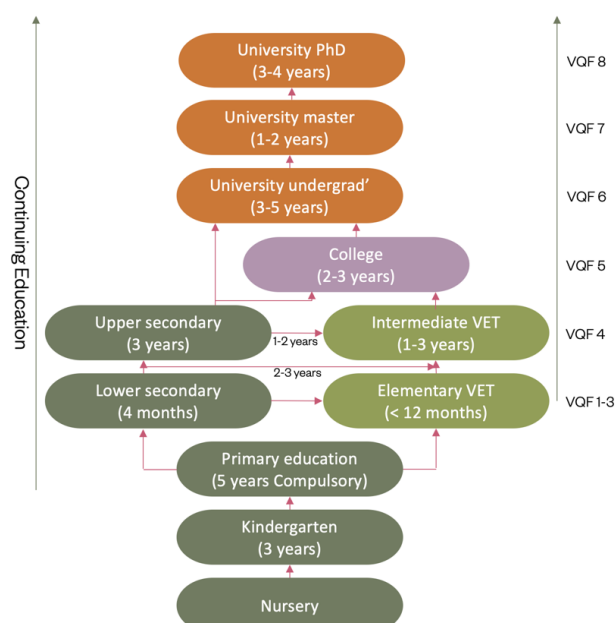
4.2.1. The core model – an example

What you will learn ...
1. How to identify the policy intent of a core model of lifelong learning.
2. Through examples, how to better understand different implementations of the core model.

An illustration of the core model can be found in Vietnam, which places significant emphasis on preparing young individuals for entry into the workforce (ASEAN 2022).

Diagram 4 below illustrates that this model strives to establish interconnectedness within the Vietnamese Qualifications Framework (VQF) by creating flexible pathways that seamlessly bridge formal education and TVET, effectively addressing challenges like high dropout rates frequently observed in middle- and low-income countries. Moreover, Vietnam's core lifelong learning model encompasses a wide spectrum of qualifications and levels, ranging from vocational certificates to higher education degrees, thereby fostering an environment that encourages individuals to actively pursue opportunities for learning.

► **Diagram 4. Formal education and TVET in the Vietnamese education system**



Source: authors

The core model of lifelong learning in Vietnam further shows that it covers a broad range of qualifications and levels, from vocational certificates to higher education degrees, while also encouraging individuals to pursue lifelong learning opportunities. This policy intent on the provision of formal education from nursery to higher education is a common feature of the core lifelong learning model.

The core model aims to develop the foundation for a high-skilled workforce with aim of establishing Vietnam as an upper-middle-income country by 2030 (Hanoi Times 2022), and as a “Learning Society” in the same period (UIL 2013).

While the core model may not have numerous objectives, challenges do inhere. For instance, limited funding may represent a barrier to augmenting the core model, leaving policymakers with the task of developing new funding sources. However, engaging stakeholders, particularly employers, in supporting funding and lifelong learning presents an ongoing challenge often requiring time, consultation and sometimes experimental partnerships for new tools to be established. High drop-out rates or a lack of employment opportunities can also be significant concerns within the context of the core model.

4.2.2. Other core model examples

We have emphasized that there are no fixed formulae in terms of policy tools. For example, the core model in Thailand, while focusing on employment entry, has included a “dual curriculum” within TVET (UNESCO and OECD 2016; Mongkhonvanit 2017). As such, additional elements have been introduced into the formal education system to enhance the impact of TVET for entering into employment. These include:

- employer involvement in TVET provision via public-private partnerships;
- apprenticeship integration in school curriculum;
- work- and school-based TVET
- pre-vocational courses;
- dual certificates;
- flexibility in TVET for lifelong learning;
- mobility support for TVET learners;
- coordination of TVET standards and qualifications;
- lifelong learning for professional development and qualifications;
- credit bank system to support TVET-based lifelong learning.

Notice that the additional tools included in the above core model may expand the capability and effectiveness of the TVET model. For example, pre-vocational courses may enable students with very little prior education to get training. For older workers, the bank loans system could help them get the necessary qualifications for employment. However, policy intent is still focused on education-to-work transitions as part of preparing people for work. The choice of additional tools depends entirely on the fit-for-purpose criterion.

Review exercises

1. What is the primary focus of your country's skills policy – employment entry, reskilling, addressing diverse employment-related concerns or lifelong learning reform?
2. If the fit-for-purpose principle is adhered to, does your country require a dual-track TVET approach combining school- and work-based learning (in the event it is not already in use)?
3. Apart from the challenges discussed above, are you familiar with any additional issues relevant to the core model?

4.3. The augmented model

What you will learn ...

1. How policy intent transitions from the core model to the augmented model of lifelong learning.
2. The underlying reasons driving these changes.
3. Instances of the augmented model – encompassing cases within the informal sector – wherein the TVET system addresses broader employment-related issues.

While the core model system has proved effective as a way to help fulfil employment requirements, it can eventually prove inadequate over time. At a certain point, an augmented model may start to take shape. One example is when an economy undergoes what is known as “structural change”. For instance, following a decade or so of manufacturing sector expansion, the sector may require a move up the value chain. An example here is transition from a domestic textile industry to one exporting fashion garments. Consequently, the integration of new tools, such as TVET incorporating supply-chain expertise and skills, becomes imperative. The underlying message is that the initial TVET focus of facilitating education-to-work transitions may eventually need to take on wider employment challenges.

These wider challenges may encompass upskilling and reskilling in response to the emergence of diverse job prospects and a requirement to redeploy workers into new roles. Migrant workers from rural sectors might need retraining to fill these vacancies. In certain instances, inequality could be exacerbated should emerging sectors offer higher remuneration. Effectively addressing these hurdles can entail skill-related support such as implementing certain measures as well as developing non-skill policies such as employment legislation.

4.3.1. An augmented model example: apprenticeship reform in England

In 2017, England implemented a reformed apprenticeship system with the primary objective of enhancing the accessibility, quality and employer-led nature of apprenticeships. The previous apprenticeship system had been in decline due to concerns regarding inconsistent training quality and limited employment prospects. In response the reform introduced several key changes, among them: a new levy system aimed at augmenting funding and enticing more employers, the establishment of employer-driven training standards, and the introduction of a new apprenticeship pathway tailored for degree holders.

This novel approach aimed to furnish apprenticeships with practical work experience while enhancing alignment with potential employers and their needs (McKnight et al. 2019). Importantly, the reform also removed age barriers, enabling the participation of older individuals. Foley (2021) underscored that during the 2019/20 period, 151,000 apprenticeships (constituting 47 per cent) were initiated by individuals aged 24 and above, with nearly half of them falling within the 35-49 age bracket. This revamped apprenticeship programme underscores the necessity for innovative solutions to address ever-evolving employment challenges. The new system transitioned from a time-served model to one rooted in professional standards. Simultaneously, a wider spectrum of individuals – not solely those newly entering the job market – can reap the benefits of work-based training to facilitate career shifts.

4.3.2. An example of the augmented model in the informal sector

In India, the Pradhan Mantri Kaushal Vikas Yojana (or Pradhan Mantri Youth Training Scheme) operates three employment programmes: short-term training, Recognition of Prior Learning (RPL), and project-based learning through a system of sector skills councils. The RPL programme provides a valuable illustration of the evolution of an augmented model of lifelong learning. Nehru’s study (2022) found that, while short-term training proves

beneficial, the more significant challenge lies in employers recognizing the acquired skills. Many employers might possess limited knowledge concerning the standards relevant to their workplace needs. Consequently, RPL assumes an enforcement role that runs parallel to training. This assistance is particularly advantageous for young Indian workers, especially those who have been engaged in the informal sector, for it allows them to obtain industry-relevant skill certifications based on the skills they have already acquired. The goal is to empower these youths to secure improved employment opportunities and livelihoods.

Like India, Kenya has a substantial proportion of employment provided by micro and small enterprises. Approximately half of these enterprises are owned by women in the informal sector and are without employees (Kiraka 2013); the enterprises are primarily engaged in local trade and services, focusing on low-value sectors. Although these enterprises offer a vital source of employment opportunities, 78 per cent fail in the first year (Mutukaa and Laktabai 2019).

The Women Enterprise Fund (WEF), a Government of Kenya initiative, was established in 2007 to nurture and support these enterprises. The WEF provides funding for start-up endeavours as well as training in essential business knowledge necessary for operating these enterprises. The same study also found that 86 per cent of the users either agreed or strongly agreed with the training's usefulness. However, significant challenges persist involving inadequate funding and protracted procedures associated with the application approval process. In the context of our discussion, the augmented model in Kenya needs to tackle non-skills issues such as funding as well as efficient administrative support in order to deliver a better provision of TVET.

Review exercises

1. What benefits would arise from extending the practice of apprenticeships to non-traditional learners in this mode of training?
2. To what extent do you agree that the majority of concerns in the augmented model of lifelong learning pertain to addressing the intricacies and complexity of employment-related matters?
3. Apart from the challenges outlined here, are you familiar with any supplementary issues pertinent to employment in the informal sector?

4.4. The expansive model

What you will learn ...

1. The meaning of an expansive lifelong learning model.
2. An understanding of the model's application through scrutiny of two case studies.

The expansive model of lifelong learning may encompass many of the tools we have observed in the core and augmented models. However, the defining feature of the expansive model emerges in policy design, wherein lifelong learning serves as the organizing principle that shapes the entire skills system.

As described in the definition provided in Section 1, lifelong learning is inherently a broad concept. As such, it is often aligned with long-term personal and socio-economic objectives. The expansive model therefore may cover the need for creating meaningful employment, fostering self-actualization among workers and for individuals

not currently employed, and promoting sustainable enterprise and economic development. Thus, the emphasis on employment is not the sole but one of several objectives within this model.

By establishing lifelong learning as the fundamental organizing principle for the entire system, a significant reorientation ensues. In a conventional approach, distinct learning silos oversee separate activities such as formal education, youth training, adult education, learning for the long-term unemployed, and personal growth learning, among others. With the expansive model, however, lifelong learning takes centre stage as the policy focus, irrespective of factors such as labour market status, age, gender or economic circumstances. Pivotal here is that new policy tools may be required within the system to stimulate lifelong participation in learning of all kinds, whether employment-related or otherwise. As such, the expansive model exhibits openness in terms of learning topics, a broad scope in terms of provision, and a high degree of integration in terms of diverse learning activities to achieve impact (for example, recognition and broader societal goals).

4.4.1. An example of the expansive model: lifelong learning policy for personal development in Finland

As previously mentioned, when lifelong learning transforms into the organizing principle, learning provision frequently expands beyond the immediate employment needs. Finland exemplifies this and provides an interesting example of the expansive model.

In Finland, lifelong learning is facilitated through adult education. Before the 1990s, Finland operated within an augmented model of lifelong learning, wherein employability served as the principal focus for adult education. However, since the 1990s there has been a shift in policy focus. Lifelong learning has evolved into the organizing principle for adult education. This shift implies that while the previous economic motive for learning was primarily retraining workers, adult education had to emphasize the need for personal learning choices. Consequently, additional learning opportunities became available, all the while maintaining the existing TVET and formal education provisions for both younger students and adult learners.

In the post-1990s system, as lifelong learning became the prominent organizing principle, a notable aspect emerged within the Finnish lifelong learning system: non-formal education assumed an important role in many of the approved learning activities. In Finland, non-formal learning is referred to as “liberal learning/education”.¹

As outlined in the Finnish Act on Liberal Education (632/1998) – legislation promoting lifelong learning and adult education – liberal adult education is defined as “education and training that is not part of the basic education system or vocational education and training system” (Government of Finland 1998, page 1).

This change in policy objectives broadened the scope of learning activities from the previous employment-related focus to encompass an extensive range of other learning pursuits, including:

- courses and workshops on language learning, arts and crafts, personal development and computer skills;
- sports and physical activity programmes;
- cultural events and activities;
- learning via volunteering opportunities.

¹ Please note the term “non-formal education” (NFE) used in the Finnish case differs slightly from that used by the ILO. The ILO tends to refer NFE as a learning provision for “transition from work to school”, as in the case of child labourers making use of NFE as preparation for formal schooling. NFE may include basic education along with practical life and work skills. See <https://www.ilo.org/ipec/Action/Education/Non-formaleducationandtraining/lang-en/index.htm>.

The Act stipulates that the purpose of liberal adult education is to:

- improve adults' education and practical knowledge required in everyday life;
- provide adequate social adaptation of adults to work and life-based environments;
- promote active citizenship and participation in society;
- enhance the individual's well-being and quality of life.

Changes in funding policy were also enacted to support diverse new activities, such as:

- providing grants to organizations that offer liberal adult education programmes;
- subsidizing the cost of liberal adult education courses and workshops;
- offering tax breaks to individuals who participate in liberal adult education programmes.

The Finnish case study offers two key insights. Firstly, it illustrates that Finland's expansive lifelong learning model acknowledges the symbiosis between personal development and employment-related benefits. For instance, to upskill or acquire deep skills, the learner must be able to pursue a personal "passion". This process isn't confined to a one-off training session; it's a long-term endeavour with some activities occurring in different settings, including non-formal ones. The skills system may need to be restructured to support this new orientation. Secondly, the Finnish approach to lifelong learning through adult education is underpinned by the "andragogical approach" to adult learning, which renders lifelong learning "learner-centric", developmental, and rooted in a broader spectrum of learning activities and experiences (Ogienko and Meleshko 2017).

Review exercises

1. To what extent do you believe that lifelong learning models are culturally influenced?
2. How much, if any, does the andragogical approach influence or inform your skills policy?
3. Identify the factors influencing adult learning in your country?

4.4.2. An example of the expansive model: the SkillsFuture policy in Singapore

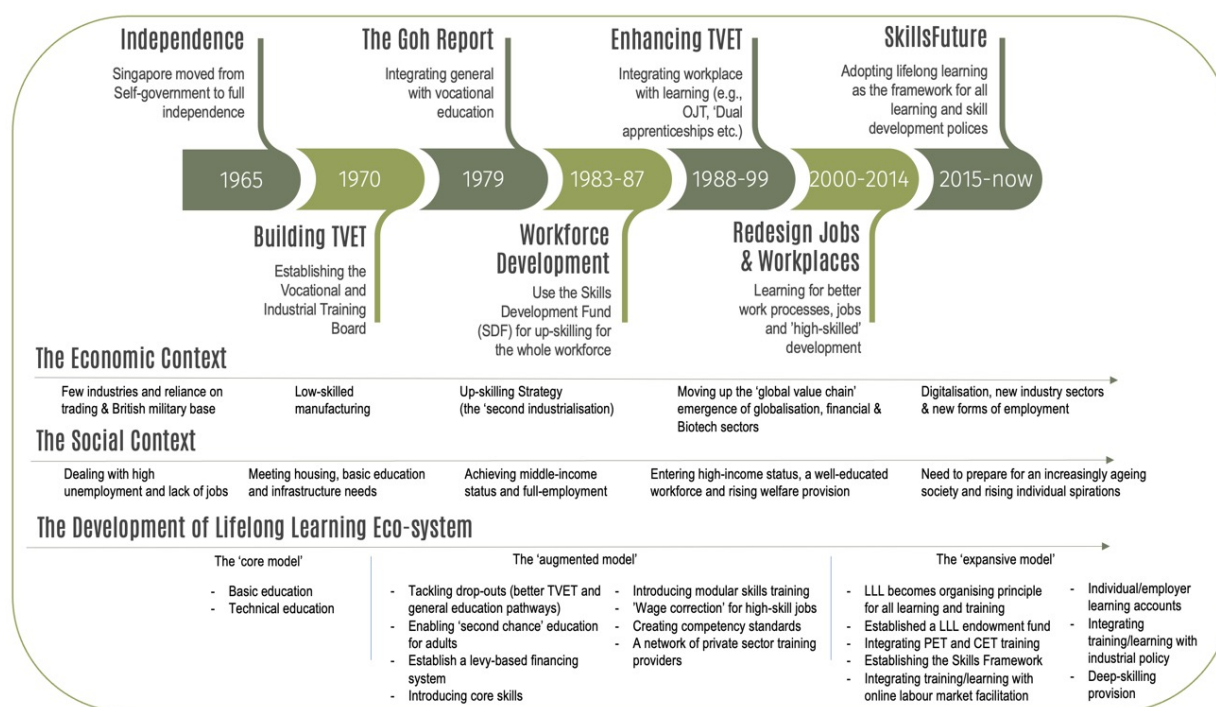
Singapore has undergone several rounds of skills reforms since gaining independence in 1965, driven by economic growth and changing economic demands (Sung 2006; Raddon 2012). The evolution of the skills system mirrors the gradual emergence of lifelong learning as an organizing principle, which materialized in the recent stage through the adoption of the SkillsFuture policy in 2015. Like other nations, Singapore also utilized the core and augmented models prior to 2015.

Diagram 5 illustrates the critical stages and contextual factors that led to the present-day SkillsFuture policy:

- At independence in 1965, Singapore encountered high unemployment rates due to the departure of the British armed forces from the island. To counteract this, low-skilled manufacturing was introduced, offering employment opportunities. The establishment of the Vocational and Industrial Training Board (VITB) played a pivotal role in connecting technical education with a substantial portion of the workforce. The primary goal was to equip workers with fundamental vocational skills to meet the demands of low-skilled manufacturing – these efforts constituting the nation's core model era – and thereby laying the groundwork for future advancements.
- In the augmented model phase from the 1980s to 2015, further development made necessary an imperative to diversify away from low-skilled manufacturing, especially as competition intensified and

full employment was attained by the late 1970s. This compelled a comprehensive endeavour to reskill and upskill the workforce as Singapore moved up the global value chain. To secure additional funding, the Skills Development Fund (SDF) was instituted, incentivizing employers to invest in training and elevate skill levels.

► **Diagram 5. Formal education and TVET in the Vietnamese education system**



Source: authors

It is also important to note that social and individual development objectives were not featured during the augmented stage. Skills provision gradually became divided into two silos: the pre-employment education and training (PET) sector and the continuing education and training (CET) sector.

To effect upskilling, there likewise was need to enhance business models and practices, especially among local SMEs. Thus in 2003, the Standards, Productivity and Innovation Board (SPRING) was established to boost productivity, foster innovation and ensure compliance with international standards among SMEs. This serves as an example that, to enhance employment, the augmented model may need to consider other enabling elements within the system.

Thirty-five years of development in Singapore led to the establishment of a complex CET system. Eventually, it became apparent that a new approach to skills development was imperative as the augmented model might no longer be suitable. In 2015, the SkillsFuture initiative was launched. This initiative explicitly embraced lifelong learning as the organizing principle for designing and delivering the entire skills development system, catering to the learning needs of every citizen. This further entailed a review that bridged the PET and CET divide, recognizing the necessity for a seamless learning transition from school to work throughout one's working life, and even into retirement. Additionally, the provision became more learner-centric. The SkillsFuture credit – a form of individual learning account – was launched in 2016.

With adoption of lifelong learning as an organizing principle, new policy tools were required. For instance, new career assessment tools, together with a “skills framework” referencing skills, were introduced. Other tools and platforms, such as Jobs Bank, MySkillsFuture and MyCareerFuture – serving as resources for self-assessment, job search and information about approved courses and funding – were also added. Furthermore, new provision was introduced to support learning for individuals in retirement and individuals who engage in “deep-skilling”.

In summary, three notable points about the expansive model of lifelong learning in Singapore can be highlighted. Firstly, lifelong learning did not become an organizing principle until later, reinforcing one of the points previously made – namely, the “evolutionary” trajectory of skills policies hinges on evolving needs. Therefore, the Singaporean lifelong learning model might not be directly applicable to another country. Secondly, as in the augmented model, the enabling elements – some of which are non-training provisions such as career development – are crucial for achieving the intended policy outcomes. Thirdly, while a strong emphasis on work-related skills remains prevalent in SkillsFuture, there is a recognition that deep-skilling requires a high degree of personal interest. In other words, beyond financial incentives, a question arises: how do we inspire individuals to develop a passion for a subject so that deep-skilling becomes feasible? The individual learning account is one of the mechanisms supporting a “learner-centric” approach to skills development.

Review exercises

1. What aspects of the lifelong learning model in Singapore might serve as inspiration for the future development of your own lifelong learning model? Why?
2. Other than employment-related training, what other learning goals are supported by your skills policy?
3. How long is your current skills system expected to remain effective before significant changes become necessary?



5. Policy tools for lifelong learning

As depicted in table 2, certain policy tools may be relevant to more than one lifelong learning model. This is because some of these policy tools continue to fulfil valuable roles even as the policy intent might shift. In most instances, this shift does not entail a complete abandonment of prior policy objectives but rather an evolution alongside them.

In this section, while it is not possible to have a complete list, we highlight some of the most frequently employed policy tools for lifelong learning. The adoption of these tools invariably hinges on policy needs. Additionally, you will observe that not all tools pertain to the delivery of training/learning; some tools are enabling devices facilitating the occurrence of learning. Examples include individual learning accounts, micro-credentials, future skills need intelligence and sector skills councils, just to name a few.

What you will learn ...

1. Aspects of some of the most common policy tools employed to support lifelong learning.
2. An understanding of the two types of commonly used tools: learning delivery tools (for example CVET, work-based training and others); and enabling tools, specifically those that facilitate learning activities and including tools such as enterprise agreements, individual learning accounts, qualification frameworks and more.

5.1. Integrating continuing vocational education and training (CVET) and training, work-based learning and non-formal learning

5.1.1. Continuing vocational education and training (CVET)

Continuing vocational education and training (CVET) refers to education and training programmes designed for individuals who are already employed and seeking to enhance their knowledge, acquire new skills, and advance their careers (for example, by moving to a higher or more complex job role). These programmes are particularly relevant for mid- or late-career workers who need to keep up with rapidly changing work technology.

CVET may overlap with other forms of training. For example, it may overlap with adult learning, a category that includes people who may not be seeking work. In another situation where employers are involved as a provider (for example, interns, work experience or placements), CVET also overlaps with work-based learning.

CVET is a useful tool for lifelong learning and its level of importance has risen rapidly in the past 30 years. A number of reasons account for this trend:

- **Globalization:** The advance of globalization during the past 30 years means that more and more countries have become participants in global trade and thus the global value chain. With this, we see structural change in many countries (McKinsey 2019). High-income countries may experience “offshoring” leading to decline in some industries as well as the emergence of new ones, while low- and middle-income countries may see growth of manufacturing and services which gives rise to transfer of workers from the rural sector to manufacturing and services. In every case, dynamic changes in the industrial structure require the support of CVET.

- **Labour market and education level:** Nearly all countries have experienced rising levels of education participation throughout the post-war period. Empirical results worldwide show that the more educated a workforce, the higher the demand for further learning (OECD 2018). Moreover, career patterns are changing everywhere. They are now shorter and more diverse (Lyons et al. 2015), and new forms of employment are emerging. All these factors demand continuous learning beyond initial education.
- **Technological change:** In recent times, rapid technological change is likely the main driver affecting business models, production methods, new processes and products, and new skills requirements. In 2014, Brynjolfsson and McAfee (2014, page 11) warned:
 - Technological progress is going to leave behind some people, perhaps even a lot of people, as it races ahead. [...] there's never been a better time to be a worker with special skills or the right education, because these people can use technology to create and capture value. However, there's never been a worse time to be a worker with only "ordinary" skills and abilities to offer, because computers, robots, and other digital technologies are acquiring these skills and abilities at an extraordinary rate.
- **Demographic change:** In some countries the most salient aspect of demographic change is ageing. As such, many countries expect that more older people will continue to be economically active and many of them may need new skills to adapt (Lain and Vickerstaff 2014).

► **Box 1: CVET in Greece**

Greece has encountered low levels of work-based training, limited formalization of training and diminished organizational performance within most enterprises. This situation primarily arises from the fact that 99.9 per cent of Greek enterprises are SMEs, with the vast majority being microenterprises with fewer than ten employees (OECD, 2020).

The most recent reform aimed at fostering more continuing vocational education and training (CVET) within enterprises is largely supported by the European Social Fund. It involves enhancing the quality of CVET by identifying specializations and corresponding job profiles for CVET purposes, aligned with national and regional needs (EU 2017).

This forms the foundation for the redesign of CVET programmes. Furthermore, the reformed CVET will need to incorporate "standards" into the programmes, encompassing programme design, methodologies, training conditions like hours, participants, trainers and internships. For publicly funded programmes, the training provision must adhere to the outcome standards established through the tendering process, as well as the prerequisites for utilizing training vouchers that receive public funding.

The Greek experience may resemble that of numerous countries characterized by low incidence of work-based training and a dominance of SMEs. The policy implication here is that CVET reform might not entail introducing complex and sophisticated systems. Instead, it could involve commencing with a robust provisioning framework before progressing to subsequent stages.

Review exercises

1. What roles does CVET play in addressing skills requirements in your country/region?
2. Building on your response to exercise 1, is the level of policy provision sufficient? If not, what further measures could be taken?
3. To what extent do SMEs engage in CVET training in your country/region?

5.1.2. Work-based learning

Work-based learning encompasses any learning that takes place in a real work environment, such as internships/traineeships, apprenticeships, work experience and on-the-job training. Work-based learning shows that lifelong learning does not have to be limited to the classroom since the workplace also provides opportunities for learning. Work-based learning is gaining popularity in relation to lifelong learning for at least four reasons:

- **Authentic learning environment:** Work-based learning could improve the quality of training as it is considered “authentic” compared to classroom-based learning. The acquisition of technical or soft skills are closely linked to the worker’s job (Aarkrog 2005). The authenticity also stems from other reasons, such as slower technology or equipment updates in TVET institutions compared to the workplace, and work processes that require particular skills that may be influenced by a specific business or management model and technology. Often, business processes and management models are not part of the technical training in TVET training.
- **Better linkage between formal education institutions and employers’ needs:** Employers’ input in TVET syllabi is not new. However, an increasing trend is to innovate within the partnership between educational institutions and the workplace, leading to improved quality and heightened experience in the learning programmes (Atkinson 2016).
- **Labour market matching:** Work-based learning provides the opportunity for the employer and the trainee to assess each other’s suitability before committing to a long-term employment relationship (Acemoglu and Pischke 1999).
- **Lower training costs:** Trainees participate in the actual production process and, therefore, contribute to the output of an organization. Even when a new trainee’s initial contribution is relatively low, the value increases as the trainee acquires more skills within the job (Mohrenweiser and Zwick 2008). This reduces the time required to learn something new and apply it in the workplace.

Like the CVET examples, work-based training represents another form of improvement to the provision of TVET via actual work-based learning. Many of the points above show that this tool can enhance the employability of the workers.

► Box 2: Work-based learning in the Philippines

The Philippines government established a Technical and Vocational Education and Training (TVET) system in line with the German Dual Training System model (DTS) due to changing demands, shifting industrial needs and government focus on improving the national socio-economic situation.

The Dual Training System (DTS) Act of 1994 established the system through legislation, mandating the participation of various national and regional Technical and Vocational Institutes (TVIs) and other training centres accredited by the national Technical Education and Skills Development Authority (TESDA). The Act also took in employer bodies and enterprises in devising, delivering and evaluating the DTS (Mapa 2016).

The DTS model combines higher-level VET within institutional settings with work-based learning (WBL) carried out at the workplace, a simulated workplace or is workplace-based but assessed by TVIs. It also encompasses community-based DTS through partnerships with local government or NGOs. This model adheres to a set of standards and quality measures, ensuring that learning and training align with both national standards and workplace demands.

DTS aimed to improve job prospects, enhance national competitiveness and alleviate poverty. The DTS became a part of national legislation, enabling the government to secure funding and provide fiscal incentives for employer engagement. For instance, companies involved in DTS can claim up to 50 per cent of costs paid

to training institutes, among other deductible expenses like donations and subsidies (Mapa et al. 2016).

Enhancing access to programme provisions and implementing learning and teaching standards to ensure quality has been a primary focus of these reforms (Oxford Business Group 2017). As a component of K-12 reform, two extra years were appended to basic education, with vocational studies becoming an option for students.

The establishment of DTS involved extensive efforts to identify industry needs, align learning with employer requirements and national objectives, and lead to nationally recognized certification for learners. This entailed enhancing certain parts of the curriculum and significantly increasing the hours learners spent in the workplace, with WBL hours extended from the original 80 to 1,000 hours of the curriculum (Development Asia 2018). The programmes now span various industries, including hospitality, automotive, metalworking, construction, food production and finance.

A cost-benefit study (Mapa et al. 2016) revealed that despite regional and firm size variations, benefits outweigh costs. Employment rates of DTS graduates have progressively risen, and the greatest benefits accrue to enterprises employing trainees after placement. Moreover, investment returns increase as graduates settle into their roles, leading to productivity gains and reduced recruitment expenses. Employers also value additional staff freeing up existing workers for other tasks and bringing fresh insights to the firm. Another study indicated that the longer in-company DTS training is in effect, the more pronounced are earning increases after graduation (Yamauchi et al. 2018).

Notice that across different examples, there is an increasing emphasis on standards and creating certification that is nationally recognized, if not internationally. This helps create more portable credentials for learners and to support better employability in times of change.

Review exercises

1. Work-based learning has the potential to significantly integrate lifelong learning into the workplace. To what extent is this tool already used in your country?
2. Certain groups of learners may be left out should work-based learning become the main tool for lifelong learning. Which groups are these?
3. What additional workplace or policy prerequisites need to be established to ensure that the outcomes of work-based learning can effectively support upskilling?

5.1.3. Non-formal learning

Non-formal learning such as workshops, demonstration, basic literacy and role play is organized in the workplace; individuals likewise can organize similar off-site learning activities such as attending a seminar, listening to a podcast or simply reading a book or manual.² While non-formal learning is often not assessed or accredited, it is still organized and in some cases with sufficient structure to provide guided learning, for example a workshop.

In non-formal learning settings, learners participate voluntarily. This type of learning, moreover, can be coordinated by various entities including employers, trade unions, educational institutions, village cooperatives or voluntary organisations. The learning activity is usually work-related. It also occurs more frequently than we realize. Some non-formal learning is associated with specific workplace practices. Just a few examples include the use of “quality circles”, “kan-ban”, “lean techniques” and “learning organization”. In all these instances, employers play a crucial role in supporting the practices.

The open and flexible nature of non-formal learning makes it an ideal setting for broadening participation in learning, thereby allowing individuals to explore their interests. Within the context of lifelong learning, it plays a vital role in providing learning opportunities for diverse learners who might not be covered by formal education. In most cases, non-formal learning is a cost-effective tool for sharing knowledge and enhancing workers’ skills and workplace productivity.

► Box 3: Non-formal learning in Sub-Saharan Africa

Much of sub-Saharan Africa suffers from low levels of formal education, and the situation is particularly severe among farmers, who make up over half of the workforce (Arias et al. 2019). Improving farmers’ knowledge and skills could have a significant impact on their economic well-being and productivity.

However, the dispersed nature of agricultural communities across vast rural regions makes accessing vocational schools in towns or cities a daunting task. This necessitates the delivery of learning through “agricultural extension units”, which not only impart education but also offer practical support services to disseminate knowledge across the entire production spectrum. In fact, agricultural extension units have evolved into the foremost learning mechanism for farmers in this region (Arias et al. 2019).

In spite of these efforts, evaluations of the programmes indicate that many fell short of expectations. One challenge arises from the fact that while knowledge dissemination is crucial, the utilization of updated technology to translate that knowledge into practice remains limited. Thus, learning holds value only when coupled with the application of acquired knowledge. The lack of financial support in the form of technology adoption among those who have gained knowledge presents a significant barrier to change.

Other operational challenges exist. Small-scale farmers, for instance, are situated in geographically scattered areas lacking reliable transport infrastructure, rendering it challenging for extension units to reach all corners. Ironically, the most underserved are often those with the greatest needs.

This example underscores the particular significance of NFE for specific demographic segments, particularly those beyond the conventional, formal education system. Nonetheless, effective learning strategies must go beyond the confines of learning infrastructure. To this end, emerging as pivotal components in delivering impactful education and training are enabling elements such as logistics as well as financial backing including investments.

² As mentioned in Section 4.4.1, we make a distinction between non-formal learning and non-formal education given the ILO has defined the latter as a form of education provision intended for “transition from work to school”, especially for those workers who have previously missed out the opportunity to receive formal education.

Review exercises

1. Is widening participation a policy goal in your skills system? If so, what specific policy tools are currently available and what others might be applicable?
2. Within your country, which ministry or department would be the most suitable entity to champion non-formal learning as a policy? What underlies your selection?
3. To what extent do you agree that non-formal learning is one of the most cost-effective forms of learning?

5.2. Enterprise agreements to link worker lifelong learning with productivity

Significant improvement in TVET training can be achieved via greater learning opportunities within workplaces. However, persuading employers to foster additional learning often proves challenging due to the immediate pressures of workplace productivity.

Fortunately, there are ways to overcome these barriers. For example, in countries where tripartite or collective bargaining is involved in industrial relations, workers' representatives are integral to identifying, agreeing on standards for, and designing skills development at the enterprise level. A partnership approach with social partners can strategically integrate opportunities for learning into work, and in some cases, even formal recognition for workers' enhanced skills.

Unlike TVET, CVET or non-formal learning as discussed in previous sections, enterprise agreements do not serve as policy learning tools. Instead, these agreements foster an environment that encourages increased learning in the workplace while establishing employers' cooperation in the activities. In this manner, they represent a type of enabling tool, as previously introduced at the outset of section 5. Enabling tools such as levies, skills frameworks, micro-credentials, sector skills councils or RPL typically assume greater significance when the policy focus transitions from initial TVET.

► Box 4: Italian works council and employer-supported lifelong learning

Under Italian national legislation, works councils (representing workers) act as stakeholders to provide a forum to discuss and agree upon a wide range of learning activities. These are organized in such a way as to be directly linked to employment-related matters, such as training, promotion and pay.

Agreements produced by Italy's works councils involve the following (ILO 2020: 19):

- identifying the amounts and types of continuing learning needed and the total number of workers involved;
- improving access to training opportunities, especially among those who were unable to take part in previous training activities;
- disseminating training and learning initiatives offered locally, especially ones related to participants' work;
- identifying expected training needs in response to technological developments within an enterprise.

Agreements are formed at the enterprise level and are backed by national legislation and agreed-upon terms and conditions. The developmental nature of these agreements means that learning is progressive and continuous, leading to a form of lifelong learning within the workplace and one based on what is helpful both for the companies and the workers.

Productivity contracts are created, and companies can receive tax reductions when they pay a productivity bonus to a worker who has engaged in the agreed lifelong learning and has met the agreed conditions. This is very useful because it provides a win-win outcome for all those involved, workers and employers alike.

Review exercises

4. How involved are stakeholders – such as employers, tripartite partners and interest groups – in the development of skills policy in your country/region?
5. In your country, which stakeholders are most able to help promote learning in small and medium-sized enterprises (SMEs)?
6. Apart from enterprise agreements, what other enabling tools are likely to be effective in promoting more learning in enterprises?

5.3. The sector-council approach – greater involvement of employers for a demand-led skills model

Sector skills councils are sectoral bodies that enable industry (or employers) to be central in driving the training effort, for instance regarding plans, content, methods, standards, certification and funding matters. Instead of explaining the sector skills councils generally, we use the South African case to illustrate how sector skills councils work in the augmented model of TVET.

In post-Apartheid South Africa, the creation of a competency-based vocational training system was a radical response to moving away from the previous education system that provided few benefits to the majority of the population. The Skills Development Act (1998) established the basic infrastructure for skills development and lifelong learning. The key elements include:

- National Qualifications Framework (NQF);
- Sector Education and Training Authorities or SETAs (21 sector skills councils that oversee delivering a sector skills plan and the national learnerships programme); and
- skills development levies.

Building on the entry-focused and TVET-based core lifelong learning model, the South African TVET system makes use of the training levy to encourage employers to provide more skills development for workers. Firstly, the Skills Development Act makes it clear that two priorities have to be addressed via the vocational training system and its associated National Qualifications Framework (NQF). These two priorities are:

- To improve skills and productivity with aim of increasing the quality and competitiveness of the workforce.
- To create a more inclusive and cohesive society.

Secondly, while the training levy normally supports sectoral training (under the administration of the SETAs and the mandate of the Skills Development Levies Act, 1999), training programmes need to focus on disadvantaged groups such as youths, women, people with disabilities and people in rural area.

The South African experience shows that TVET does not have to be entry focused. The policy goal now expands to tackling other employment-related issues. The other lesson that we can draw from the South African TVET system is the role of legislation for lifelong learning. Legislation can define how the levy is used and how to deliver

the benefits of learning to both employers and learners via TVET (Raddon and Sung 2006). The third lesson is that with levy support, an employer body can represent industry interests regarding training promotion. This provides the basis for coordinated industry action and reduces the incentive to poach.

► **Box 5: Sector skills councils – food processing in India**

The food processing industry in India has continued to grow rapidly; however, a significant shortage of skilled staff remains an impediment. From 2015, cooperation among the Ministry of Food Processing Industries (MoFPI); the Food Industry Capacity and Skill Initiative (FICSI), a sector skills council; and the industry itself led to development of the Skill India initiative. This yielded the building of training facilities, the accrediting of partner training institutions, and the developing of training programmes in order to expand the workforce in this sector.

By 2019, over 23,000 trainees had been certified as a result of training provided by the food processing council. However, an interesting element of the sector skills councils factor in India is that they also attempt to create greater mobility for the workers within the food processing industry.

Working under the Pradhan Mantri Kaushal Vikas Yojana (PMKVY) programme, all sector skills councils provide core training activities for young people entering the sector, as in the case of food processing. Using its assessment capability, FICSI can also provide assessment for the recognition of prior learning (RPL) for workers who have the skills and experience in the sector but do not have formal recognition because they entered via an informal route.

Sector skills councils are sector bodies representing the interest of the sector as a whole and those who work in it. They recognize the importance to certify prior learning which can support individuals' mobility. The bodies enable upskilling while also providing a means for workers to seek out decent work if their current situation is not suitable. For its part, the RPL programme provides certain financial incentives, with the overall policy goal being to raise skills levels nationally and fill skills gaps, while at the same time raising employability and income for workers in or looking to join this industry.

Review exercises

7. What are the most significant advantages of adopting a sectoral approach to training in promoting lifelong learning?
8. Public policy often encounters challenges when reaching out to small and medium-sized enterprises (SMEs). Would implementing a sector skills council help address this issue, given that all employers within a given sector would become members automatically?
9. To what extent do some sectoral training bodies already exist in your country/region?

5.4. Individual learning accounts

5.4.1. Types of individual learning accounts

Individual learning accounts (ILAs) are tools designed to encourage and support lifelong learning among adults who have left formal education. Unlike traditional policies that support workplace training, ILAs belong to individuals and can be used regardless of employment status. Some schemes even offer portable funding that can be carried throughout an individual's career. However, there is no single approach to providing ILAs. The OECD has identified three broad approaches:

- **Individual savings accounts for training (ISAT):** These accounts are set up like bank accounts specifically for further training purposes. They are often supported by tax incentives, public subsidies, subsidized loans and sometimes employer contributions (which are tax deductible). Financial institutions usually manage these accounts. One example is Learn\$ave in Ontario, Canada, which was introduced (as a pilot scheme) in 2001 to help individuals save for education and training by offering a matching provincial grant of up to 500 Canadian dollars per year. This type of bank-account ILA is rare compared to the next two approaches as there is much uncertainty regarding dead-weight loss and inequality effects of this tool. Often, those who can save for learning tend to be higher earners and they also have higher propensity to engage in continuous learning.
- **Individual learning accounts (ILA):** These are publicly financed learning accounts wherein the entitlement is determined after a certain period of qualification. After that time, a monetary value is allocated to qualified learners. The amount is portable and accumulative up to a certain level. The account is notional or virtual in the sense that the value becomes extant only when it is spent on an approved learning event, such as an IT course. A well-known example of this is the French *compte personnel de formation*.

► Box 6: Individual learning accounts (ILA) – the French *compte personnel de formation* (CPF)

France's *compte personnel de formation* (CPF) is a form of accumulative training rights introduced in 2015, available to all working citizens throughout their working life. CPF was established under legislation and is supported by a number of laws within the code du travail (code of employment), which ensure the funds are protected and map out how the funds can be used by individuals. The key policy aims are to facilitate individuals who wish to improve or enhance their employability through skills training. The funding can be viewed and accessed via an online portal, where potential users also can determine whether desired training is eligible for funding under the CPF (Ministere du Travail du Plein Temps et de L'Insertion 2022).

Individuals who have an education above lower secondary level receive €500 each year, capped at €5,000, while those without a lower secondary education receive a higher rate of €800 per year, capped at €8,000.

Part-time workers who work more than 50 per cent of full-time hours receive the same CPF annually as full-time workers, with the aim of maintaining the security of these workers who tend to have a higher incidence of job insecurity. Those who work less than 50 per cent of full-time hours receive the CPF at a pro-rata rate. Seasonal workers and young people on apprenticeships may also qualify for some level of CPF. For the self-employed, the rate of CPF has, since 2019, been raised to match those in contracted employment.

The CPF is virtual and becomes a fund in a real sense only once it is exercised. The fund can be used for training fees, skills assessments or training to launch a start-up. The CPF is financed through a compulsory training levy on firms of 0.2 per cent of wages.

An important aspect of the CPF is the fund follows the individual rather than the job post. As such, these training rights are portable; when individuals change jobs, they can access and use the funds in accord with their training choices. The CPF does not expire, not even when an individual is out of work and looking for a new job. The CPF ends only when the worker enters retirement.

- **Individual learning accounts that function like training vouchers:** These are publicly funded with a direct payment to individuals or training providers. Learners are encouraged to top-up the amount needed for learning. In some implementations, this type of learning account also works like a training subsidy, although there are some variations. Examples of this type of ILA include the cheque *formação* in Portugal and the National Tomorrow Learning Card (NLTC) in South Korea for those in work and jobseekers. There is also a lifelong education voucher in Korea for low-income adults. (Palmer 2022).

► **Box 7: Individual learning accounts that function as a training voucher – Individual Training Account (ITA) in the United States of America**

Individual learning accounts (ILAs) can function as training vouchers, such as the Individual Training Account (ITA) in the United States. Lifelong learning policies in the United States primarily operate at the federal or state level, resulting in varying policies across the states. The ITA was established in response to the federal-level Workforce Innovation and Opportunity Act (WIOA) goal of supporting non-standard workers, who are increasingly prevalent in the United States. Non-standard workers include those working on zero-hours contracts, part-time reduced hours and temporary contracts, as well as those doing gig work and other workers less likely to have access to training. ITAs are funded by the federal government from normal taxation, and states can apply to the federal government for eligibility to provide ITAs.

Workers visit a job centre to apply for an ITA. If an application is accepted, and after the process is complete a worker is granted an ITA, he or she must work with a career counsellor to identify suitable training. The training is provided by an accredited training provider listed on the state's eligible training provider (ETP) list and recognized as relevant to local skills demands. This approach aims to provide skills that lead to better employment outcomes and maximize impact of the policy for individuals, enterprises and each state.

The ITA allows for a certain level of individual choice along with guidance about local opportunities, a combination that can help support individual employability and self-actualization. The ITA programme also is notable for funding amount not being set and for the exact format being left to individual states to decide. This means that local authorities can set the amount of the voucher depending on factors such as the individual's situation, availability of funding within the state and policy response to diverse local issues. Additionally, how those applying are supported in the process, such as how they work with local job counsellors or how long the training programme runs, is decided at the state level. Despite this flexibility, quality and standards are ensured by using locally accredited training providers

5.4.2. The benefits of adopting individual learning accounts

ILAs, in their general form, can be useful in supporting lifelong learning in a number of ways. For example, ILAs are learner-centric insofar as they can enable individuals to tailor learning to their particular needs, whether it is for work or self-development.

Secondly, ILAs form a type of learning-on-demand scenario. This further makes possible a kind of training market within which training providers compete for ILA funds (assuming private providers are part of the learning ecosystem). A policy rationale is that competition among training providers will drive up the quality of training.

Thirdly, from the learner's point of view, ILAs are most attractive for the reason that a training resource is portable, irrespective of the worker's employment status or a specific tie with a particular employer. In most implementations of ILAs, self-employed workers are also covered by this funding device.

ILA is not a mode of training, but another enabling tool to support lifelong learning. While attractive in principle, the experience of ILAs shows variable impact. For example, in some cases, participation rates are relatively low, especially among people with lower levels of education, those in minority groups or those residing in particular localities such as lower-income areas. Other reasons for low utilization may include cost-benefit calculations involving lost incomes, travelling expenses and childcare costs, among other reasons; indeed, ILAs may not cover incidental costs. In contrast, when user participation is in fact high the administrative burden tends to be high just the same. Thus in most cases employers may not support the tool, and it can become difficult to find non-work hours to make use of ILA funding.

Review exercises

1. Under what conditions is the individual learning account most suitable to be considered as a policy (enabling) tool?
2. What might be some of the reasons for low utilization of ILAs?
3. In your view, which of the following options is the most useful ILA scheme for your country, and why?
 - a. A learning voucher, valued at 90 per cent of the course fee, is applicable to any sanctioned short course lasting up to 16 hours annually. It's important to note that the voucher is only valid for specific approved occupations.
 - b. A designated learning/education bank account is established, with the state contributing 10 per cent of the learner's personal deposit, capped at US\$500 per year and an overall accumulation limit of US\$5000. This fund can be utilized for any authorized academic and vocational course.
 - c. A virtual learning account is introduced, in which the state provides a one-time allocation of (virtual) US\$500 to every citizen age 24 to 68. This sum can be used for approved courses, with the learner responsible for any remaining fee balance. Additionally, learners possess the legal entitlement to request an unpaid study leave for up to five days every two years of continuous employment with the same employer.

5.5. Community-based lifelong learning

5.5.1. Community-based learning centres

Community-based learning centres (CLCs) are found in various countries worldwide. Essentially local units, these centres offer opportunities for learning in literacy, life skills, citizenship, health and vocational training.

CLCs can be found in cities, small town as well as remote locations that formal provision may not reach. In most cases, CLCs tend to be small units that may or may not have their own premises. CLCs also may be part of the community hall, for instance, sharing facilities with a local school, sports centre or library. The provision takes the form of informal learning groups, study circles or community groups.

These entities can deliver adult, lifelong and non-formal learning with relatively low operating costs, as these are shared with other institutions. They become more accessible to those who typically do not engage in lifelong learning due to their limited integration into the community.

► **Box 8: Community-based learning in Thailand: Developing the capacity to think**

In Thailand, community learning centres (CLCs) were first established in 1972 to promote literacy. They were later expanded as part of a UNESCO programme in the 1980s. There are currently more than 8,000 CLCs in Thailand, in the form of district non-formal education centres (Belete et al. 2022; UNESCO 2016). These centres can be found in different venues and locations, based on local needs and availability of facilities and spaces in the community (Leowarin, 2010). They are supported by legislation under the National Education Act of 1999 and the Non-formal and Informal Education Promotion Act of 2008.

The policy goal of CLCs in Thailand is to enable local people to organize learning activities in their area based on local needs. The centres' philosophy of promoting self-actualization and the ability to think supports individuals in dealing with changing situations, while also incorporating religious and cultural factors into their learning.

CLCs work well in Thailand because of the existing culture of learning together and sharing. They have become key providers of lifelong learning, literacy programmes and cultural activities. They have also expanded into areas such as vocational training to meet local conditions and lifelong learning needs.

The centres come under the Ministry of Education and the Office of the (sic) Non-Formal and Informal Education (ONIE). They are funded by a combination of national government funding and donor funding. While the CLCs are locally focused and run by and for local people, the government provides guidance on best practices for areas such as technology use, facilities and how to improve citizens' quality of life (Leowarin 2010).

At the local level, CLCs provide specific support for minority groups and reaches remote areas where learning is difficult to access. CLCs in Thailand provide an excellent example of how lifelong learning policy can work with local needs, preferences and cultural factors.

Review exercises

1. Assuming that community learning centres (CLCs) have not been formally incorporated into your skills system, for what learning activities would you use them if you were to adopt them, and why?
2. What would be the potential barriers for adoption if CLCs were formally incorporated into the wider network of TVET provision?
3. With CLCs, who are the stakeholders when it comes to delivering learning activities?

5.5.2. Learning cities

A variant of CLCs is the “learning city”, a lifelong learning tool that has been promoted by UNESCO/UIIL. UNESCO’s Lifelong Learning Institute (UIL) provides a general definition as follows (UIL 2015, page 9):

- promote inclusive learning from basic to higher education;
- revitalize learning in families and communities;
- facilitate learning for and in the workplace;
- extend the use of modern learning technologies;
- enhance quality and excellence in learning; and
- foster a culture of learning throughout life.

Implementing the learning city concept can present unique challenges and added complexity in terms of coordination, as it is an enabling tool that requires a variety of learning support from various sources, formal education institutions, TVET institutions, community and voluntary bodies, and so forth.

An especially interesting aspect of lifelong learning is seen in the Republic of Korea, where the Constitution of the Republic of Korea (Section 31. 5) institutionalizes lifelong learning and thus making it the duty of every local authority to promote it. The nation’s Lifelong Education Act (1999) sets out the obligations and responsibilities of national and local governments in promoting lifelong learning. It requires the establishment of the National Institute for Lifelong Education and its branches in every locality to provide coordination and support. This legislation underscores the significance of lifelong learning in national skills policy and supports better coordination by defining responsibilities, approach, resources and provision.

Notice that this practice, combined with the use of legislation to promote lifelong learning, may suggest that lifelong learning may be reflecting the organizing principle for the skills system – a feature we discuss in section 4 of this document on the expansive model of lifelong learning. However, as an enabling tool (with or without legislation), there is no reason that other models cannot make use of it, as long as it serves the purpose.

Many of the 600,000 citizens in Namyangju commute to work in the capital city, Seoul. This geographical relationship with the capital means that many Namyangju residents feel a sense of disconnection from their own community and consequently experience isolation. As a result, improving community connection and interaction has become a priority for the learning city programme.

To some extent, close proximity to the capital also provides an opportunity to attract inward investment by promoting Namyangju as a more cost-effective alternative to expensive locations in Seoul. Hence, lifelong learning plays a dual role in Namyangju by creating a pool of skilled people and entrepreneurs for new businesses while also strengthening a sense of community through learning activities.

► **Box 9: A learning city – Namyangju in the Republic of Korea**

The Namyangju learning city follows a “1-2-3 lifelong learning infrastructure” system where all learning facilities – including community centres, libraries, institutes of lifelong education and “learning lighthouses” (unused spaces for learning activities) – are situated within ten- to 30-minute walking distance.

These facilities provide setting for a variety of learning activities (UIL 2015: 138):

- networking among citizens to develop ideas and local connections;
- nurturing local talent and professionals;
- promoting volunteering;
- organizing citizen lecturers;
- mentoring by entrepreneurs and local agricultural leaders;
- hosting cultural and neighbourhood programmes as well as business academies.

The activities aim to reach marginalized groups such as people with disabilities, homeless individuals and low-literacy workers.

The concept of the learning city can effectively complement other lifelong learning tools such as TVET, CVET and adult education. Its advantage over a nationwide scheme, especially in a large country, lies in its focus on local context, which allows for customized learning provision. Furthermore, a learning city may also provide advantages in terms of resource management and practical delivery of lifelong learning, particularly when activities are undertaken in close cooperation with local stakeholders such as libraries, universities, resident groups and professional development bodies.

Review exercises

1. As an enabling tool, in what ways would the concept of the learning city strengthen the learning capabilities of your skills system?
2. How important is the role of legislation in guiding the provision and direction of lifelong learning?
3. What potential barriers would you envisage if the learning city concept were to be adopted in your country?

6. Factors that shape a lifelong learning framework

The next useful step is to consider the general factors that shape the formation of a lifelong learning framework and its purpose, as this can help us identify what may be useful in a given situation. The key factors may include:

- ▶ effective governance and stakeholders;
- ▶ socio-economic development stage of a country;
- ▶ level of regulation, cultural and political considerations;
- ▶ funding sources and opportunities;
- ▶ localized issues, strategic goals and national vision.

While some of these are naturally interconnected, we will deal with each factor separately.

What you will learn ...

1. A range of key factors to consider when designing a lifelong learning policy framework for your country.
2. Steps to assess policy priorities for lifelong learning.
3. How to take a holistic approach to integrating relevant factors to arrive at a lifelong learning framework that is tailored to the needs of your country.

6.1. Effective governance and stakeholders

The term governance generally refers to the process and manner in which an organization or a system is managed, directed, communicated and assessed. It encompasses the establishment of structures, policies and procedures that ensure accountability, transparency and effective decision-making. All of these components are integral to achieving good governance.

Applying this broad definition to the context of skills systems presents practical challenges, particularly when considering the diverse range of stakeholders in a lifelong learning system. Often, skill systems can become fragmented because of stakeholders' tendency to act within silos.

In the case of a lifelong learning system, numerous entities may be involved. These include government ministries and departments, formal education sectors, employers, workers, unions, research units, regulatory agencies, voluntary bodies and employment service providers, in addition to regional and local authorities (ILO 2020a). Therefore, promoting good governance begins with effective coordination among what can be a diverse range of stakeholders, rather than simply seeing to good governance within each individual stakeholder.

6.1.1. The significance of an agreed national vision and communication

As mentioned in section 2, an agreed national vision is essential for the success of any policy. It entails a comprehensive understanding among the various stakeholders regarding their precise goals and responsibilities. It represents an overarching, holistic and mission-oriented agreement that fosters long-term commitment across successive governments and facilitates continuous and incremental improvement within a system.

In particular, the ILO suggests that:

Agreements involving multiple actors should be developed through a broad and meaningful process of social dialogue. They should clarify common goals, objectives and outcomes, and detail levels of responsibility and resourcing for each stakeholder group and organisation.

ILO 2020b: 3

Sufficient detail: An agreement should include the kinds of additional details that can enhance its effectiveness. For instance, mechanisms for multi-stakeholder collaboration, expected learning (and employment) outcomes, funding mechanisms and allocated budgets can be specified to foster cooperation between the public sector and stakeholders in their respective domains. All told, well-defined responsibilities and effective communication are more likely to ensure efficient governance.

Good communication: An agreement between ministries and stakeholders can face obstacles if key information is not shared. Sharing such information improves the synergy and impact of an agreed vision. For example, in Latvia the sharing of databases provided by social security services, public employment offices and NGOs resulted in improved tracking and tailored outreach for adult learning initiatives (ILO and UNESCO 2018). Similarly, the Statistical Office of the Republic of Slovenia merged several administrative databases with the country's employment service, enabling the identification of young people who were not engaged in employment, education or training (NEET). Subsequent analysis of the characteristics of NEETs provided insights into the support services received by different categories of NEET individuals (EU and OECD 2020).

6.1.2. Approaches to effective governance and coordination

wherein leading authority is conferred to designated industry or sector bodies or sector skills councils (SSCs).

- 1) The **national approach** – which involves establishing a lead body, supported by multiple stakeholders, to enhance coordination and governance of the system. The ILO and UNESCO (2018a) conducted a review of the “whole of government” approach to implementing national skills policies and found that this approach can be beneficial. However, the review also found that there is significant variation in how lead bodies are formed, their autonomy and their decision-making capacity.

Despite these variations, certain common features within a lead body have been found to coincide with positive results. These include:

- lead body has a clear mandate and is responsible for making decisions;
- lead body consults with stakeholders and, more than simply discussions, the consultations have attestable impact on implementation;
- roles and responsibilities of lead body and stakeholders are clearly defined;
- lead body has ability to influence funding decisions;
- lead body works within a well-integrated skills system.

- 2) The **sectoral approach** – wherein leading authority is conferred to designated industry or sector bodies (or SSCs). In the case of SSCs, these bodies hold full leading authority at the sectoral level to implement and coordinate sector skills strategies and plans (ILO 2020b). Some SSCs function as government agencies, while

others are significantly steered by the respective industries, such as construction SSCs in certain countries (Raddon and Sung 2006).

Similar to the national approach, SSCs differ in terms of autonomy and level of authority within the skills system. However, several features have been identified to contribute to the success of certain SSCs over other SSC types (OECD 2015):

- ability to bring about sustained collaborations among stakeholders and government agencies at all levels;
- capability to produce sector “skills profiles”, which identify current and future skills demand for the sector;
- ability to understand how sector skills strategies and plans intersect with skills needs within the context of lifelong learning;
- ability to integrate sector skills strategies and plans (bottom-up) with long-term national economic strategies (top-down).

The national approach also differs from the sectoral approach in terms of leadership. The former necessitates a leading role by the state in developing and implementing training initiatives, while the latter requires industry/employers to take the lead.

A look at past practices seems to indicate most policymakers have leaned towards the national approach to provide governance, as the sectoral approach either has limited policy history or lacks familiarity in many countries. However, history also shows that both approaches can bring results, if implemented well.

6.2. Socio-economic development and lifelong learning frameworks

Throughout the era of international trade and industrialization, countries worldwide have undergone varying stages of socio-economic development at different rates and at different times. Irrespective of the pace of change, the stage of economic development has profound implications for the necessary skills within any economy. Moreover, social development and aspirations tend to align with economic growth. As economies thrive, so do ambitions rise within them.

Considering these growth processes, table 3 identifies skills development issues relevant to low-, low-middle, high-middle and high-income economies. While the policy issues across the columns in table 3 are generalizations from past observations, they nevertheless point to the impact of economic conditions on skills needs and lifelong learning policies.

► **Table 3: Stages of economic development, policy focus and lifelong learning priorities**

Stage of economic development and general characteristics	Broad policy focus	Priority for learning and skills provision	Lifelong learning framework
Low-income economy (<= US\$1085 Atlas GNI per capita, 2023-23)			
Reliance on traditional, agricultural and informal sectors. Illiteracy rates are often high. May not have many natural resources (or lack systems to benefit from them). Human resources are often plentiful relative to the economic conditions.	Infrastructure development. Poverty/unemployment reduction. Initial economic growth. Basic needs (e.g., healthcare and safe water, etc.).	Basic education. Literacy and numeracy. Life skills. Agricultural knowledge.	Basic education for all. Promoting informal learning. Targeting learners, e.g., youths, women, agricultural workers.

Stage of economic development and general characteristics	Broad policy focus	Priority for learning and skills provision	Lifelong learning framework
Low-middle income economy (US\$1,086 – US\$4,255)			
Reliance on traditional, agricultural and informal sectors. Manufacturing and industries are emerging. Declining poverty rates. Rising literacy rates.	Developing a focus on human resource development. Begin to examine economic diversification.	Secondary education. TVET.	TVET. Adult literacy. Promoting informal learning. Targeting learners, e.g., youths, women, agricultural workers.
High-middle-income economy (US\$4,256 – US\$13,205)			
Significant manufacturing sector. Emerging service sector. Low poverty rates. High literacy rates. Access to high technology.	Moving up the global value chain (GVC). Industry diversification. Process innovation. Productivity growth. Social inclusion.	Higher education. Upskilling provision. Engaging employers for workplace learning. Incentivizing individuals for learning. Needing substantial and sustainable funding source.	Adopt tools for lifelong/adult learning. Upskilling. Reskilling. Promoting non-formal learning. Targeting learners, e.g., structural unemployed, NEETs.
High-income economy (> US\$13,205)			
Multiple industrial sectors. Different extent of manufacturing offshoring. Relatively small employment in agriculture. Low poverty rates. High literacy rates Access to high technology. High automation.	Process and product innovation. Productivity improvement. Build knowledge-based economy. Social protection. Job creation – esp. high-quality jobs. Tackling rising inequality.	Higher education. Lifelong learning, or adult learning. Research and development. Needing substantial and sustainable funding source. Influencing the demand for high skills. Supporting flexibility for learning.	Strengthen provision and governance for lifelong/adult learning. Individualizing learning. Learning as entitlement. Upskilling. Reskilling. Labour market intelligence. Career development support. Targeting learners, e.g., disadvantaged, migrants, NEETs.

Source: authors

The content of table 3 illustrates the relationships between skills development, stage of economic development and lifelong learning policy. Not only are these relationships not precise, but we should not expect ability to place every country neatly into each box of table 3. The value of table 3 stems from lessons that we can derive from it. The following are some of the relevant policy implications:

- **The evolutionary nature of skills policies:** As we move across the income groups in table 3 from low income to high, we notice that many policy elements are evolving to meet changing needs. Rarely do we observe a significant step change. For instance, addressing youth unemployment is a recurring concern across all income groups, but its relative importance varies across income groups. TVET and formal education consistently remain essential policy tools, irrespective of the country's national income position. However, their prominence within the policy toolkit changes depending on what other learning objectives are to be achieved. Policymakers may be advised to adopt a broader perspective when modifying skills policy tools.
- **The constraints of economic resources:** The extent to which we can adopt policy tools, achieve learning outcomes and decide when to implement them largely hinges on the available resources. This resource constraint is not only relevant to new policy tools; it also impacts existing ones. Consider TVET, for instance. In low-income countries, TVET tends to focus on immediate needs such as occupational competencies, assessment and certification. In high-income countries, these aspects, while remaining important in TVET, may have to compete with changing needs such as the necessity to introduce data analytics, Industry 4.0 and green skills. Accomplishing these additional goals necessitates investment and long-term funding.
- **Country specific needs:** Policymakers must evaluate their unique requirements and identify the relevant tools. It is essential to recognize that countries within the same income group might still possess distinct skill demands. For instance, a low-income country comprising numerous small islands will likely display dissimilar skill requirements compared to another low-income country with extensive agricultural lands.

While economic development factors influence needs, they are not the only considerations in question. For instance, national culture, institutional environment and political orientation can all play a role in shaping the content and priorities of skills policies.

6.3. Level of regulation, cultural and political considerations

As we have previously emphasized, autonomy and decision-making capacity are essential for an effective national model of governance. This principle also holds true for establishing a lifelong learning framework. For example, regulatory tools can play a vital role in establishing and sustaining a lifelong learning framework.

When a high level of cultural acceptance of regulations and laws guides skills and learning matters, this will create a strong foundation for adequate funding support for lifelong learning. Examples include the use of levies in South Africa and France, the establishment of specific funding for learning cities in the Republic of Korea, and the creation of a lifelong learning endowment fund in Singapore.

Legislative measures can also be utilized to promote good governance and protect workers' rights in regard to training access and training leave (Palmer 2022). The measures can guide various societal actors in fulfilling their respective roles in lifelong learning, as demonstrated by the case study of learning cities in the Republic of Korea.

While legislative support can enhance the impact of lifelong learning systems, its effectiveness may vary across countries. For instance, in a country with a strong neoliberal culture, a top-down approach often encounters resistance. However, in a different country, the same top-down approach may be embraced as a sign of leadership. Consequently, the prevailing social or political culture plays a significant role in determining the range of tools available to support and advance lifelong learning policy.

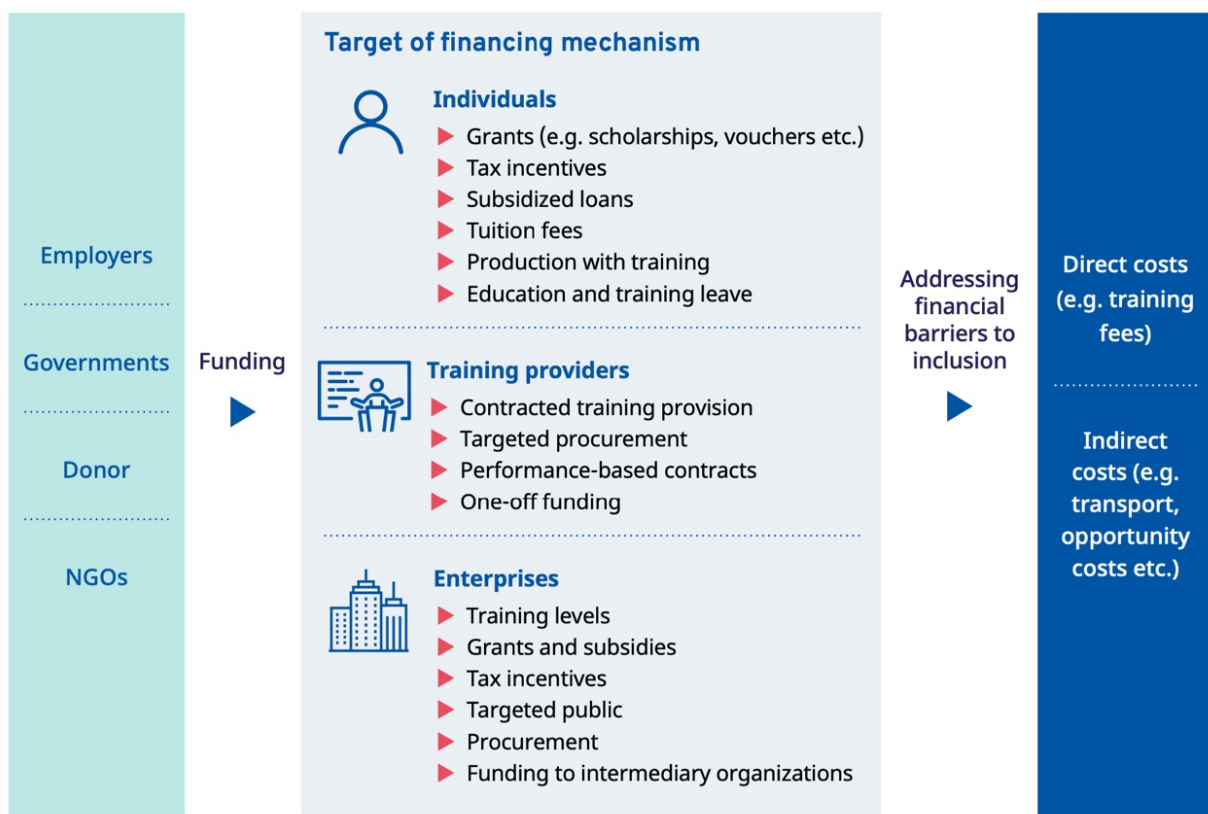
6.4. Funding sources and levels

A recent global review by the ILO on funding mechanisms for lifelong learning offers a valuable framework for examining the critical issues involved in enhancing lifelong learning for all citizens (ILO 2023). The report covers numerous issues, but for the purposes of our current discussion we will focus on two aspects highlighted in the ILO report: 1) the potential sources of funding that policymakers may consider, and 2) the kinds of best practices that can ensure increased participation (or minimize risk of exclusion) in lifelong learning.

As depicted in diagram 6, the ILO report outlines: the various sources from which policymakers can derive funding (for example employers, governments and so forth.); the types of channel they can select (such as individual, training provider or enterprise) to incentivize training and learning activities; and most importantly, the potential barriers that could undermine the effectiveness of these funding methods.

It is crucial to note that policymakers can adopt any combination of sources and funding channels. Many such combinations may work well. The optimal choice is ultimately determined by the specific context of a country as well as its constraints and opportunities, in addition to the specific policy intents we have discussed.

► **Diagram 6. Financial instruments to promote social inclusion in skills and lifelong learning**



Source: ILO, 2023: p. 3

Importantly, the report reminds us that while we often focus on the feasibility of funding methods, we sometimes neglect potential barriers that exist within any of the funding mechanism's three channels.

For instance, when funding is channelled through individuals, disadvantaged learners may require additional considerations. These learners, who may be engaged in low-paying jobs, might not find tax incentives or subsidised loans particularly beneficial. Others may face informational barriers and require career or employment guidance for funding incentives to be effective. As such, the ILO review suggests that funding mechanisms need "to be accompanied by non-financial mechanisms" (ILO 2023: 61).

Similar issues may arise with the other two channels. For example, when funding is directed through training providers, most funding models tend to stipulate quality criteria, attainment levels, fraud prevention measures and output levels. However, it's equally important to consider how procurement criteria and performance-based contracts can be used to avoid excluding disadvantaged learners (ILO 2023: 37).

Furthermore, while most employers conduct training according to their operational needs, little consideration may be given to identifying those who need training the most but do not receive it. Targeted incentives (such as those for apprentice, older or rural workers) may warrant consideration to help identify these gaps. Small and medium-sized enterprises (SMEs) and enterprises in the informal sector likewise present their own specific “non-financial mechanism” needs. SMEs may require support in formulating training plans, while enterprises in the informal sector may initially need “intermediary organisations” to coordinate their participation.

Apart from funding sources and channels, funding availability remains a common challenge in every country, one requiring the effective prioritization of key learning activities. The following eight steps can assist policymakers in precisely such effective prioritizing of lifelong learning needs:

- 1. Problem identification and analysis** – pose questions including: Are we aware of learning gaps that exist within the broad system of lifelong learning? Do we identify these gaps through the mission and visions as previously discussed, or is identification driven by immediate needs?
- 2. Stakeholder engagement** – acknowledge that stakeholders can provide insights towards identifying the most pressing lifelong learning needs and priorities in light of funding limitations.
- 3. Criteria development** – develop criteria that align with the goals of lifelong learning and the available resources. Factors such as targeting (as related in diagram 5), impact, sustainability, equity and cost-effectiveness should be considered when prioritizing different lifelong learning activities.
- 4. Assessment and evaluation** – evaluate each lifelong learning activity or policy option against established criteria. Assess potential benefits, costs, feasibility and expected outcomes of each identified need; consider potential for long-term impact and ability to leverage existing resources effectively (refer to previous discussion on linkage between lifelong learning and related systems, for example, labour market facilitation, funding that helps older citizens, technology adoption, and so on).
- 5. Comparative analysis** – conduct a comparative analysis of different lifelong learning needs, considering their relative importance and potential for positive outcomes; identify areas of synergy or overlap where addressing one need might have broader positive effects.
- 6. Public input and consultation** – seek public input and consultation from diverse stakeholders including learners, employers and communities; gather insights on specific lifelong learning needs that resonate with different groups and consider their preferences when prioritizing activities.
- 7. Decision-making and trade-offs (a synthesis exercise combining steps 1 to 6)** – make informed decisions based on analysis, stakeholder input and available resources; prioritize lifelong learning activities that align with the established criteria and have potential for significant impact, even given funding limitations; acknowledge that trade-offs might be necessary due to resource constraints.
- 8. Implementation and monitoring** – develop a “learning loop” so that initial decisions can be refined.

During the prioritization exercise between steps 1 and 7, you may need to differentiate between short-term perspective and long-term targets, should the plan be implemented in stages.

6.5. Localized issues, strategic goals and national vision

Lifelong learning policy is intended for every citizen. However, a one-size-fits-all approach may not be effective. Therefore, it is crucial to acknowledge local issues and align them with a national plan.

In large countries, local issues must be taken into account. Each region possesses unique challenges and opportunities shaped by its social, economic, locational and cultural fabric. By understanding the specific needs and aspirations of local communities, policymakers can tailor lifelong learning initiatives to address their distinct requirements.

Strategic goals are another critical consideration. A well-crafted lifelong learning policy should align with broader strategic objectives set by the government or with desirable outcomes such as those under the ILO skills pillars. Whether the goal is to foster innovation, enhance workforce productivity or promote social cohesion, lifelong learning can serve as a catalyst for achieving these aims.

Moreover, a national vision should guide the formulation of lifelong learning policies such that they encapsulate the long-term aspirations of a nation and provide a roadmap for progress. Policymakers should envision how lifelong learning can contribute to realizing this vision. By aligning policy objectives with national vision, the transformative potential of lifelong learning can be maximized.

Review exercises

1. With reference to section 6.1.2. on the two approaches to effective governance for a lifelong learning framework, which of the two approaches would be most appropriate for your country or region to consider, and why?
2. To what extent is national legislation crucial to enhancing lifelong learning in your country?
3. What method do you employ to determine funding priorities for lifelong learning or your skills strategy?

7. Concluding remarks

In this lifelong learning policy framework document, we have covered an extensive range of topics with aim of providing important background information for policymakers who are involved in designing lifelong learning policy. The next step is for policymakers to use the assessment toolkit to review the existing skills policy landscape, identify gaps and develop a plan of action for future implementation.



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► **An analytical framework and toolkit for the review of national lifelong learning systems**

Skills for Prosperity in South-East Asia Programme

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