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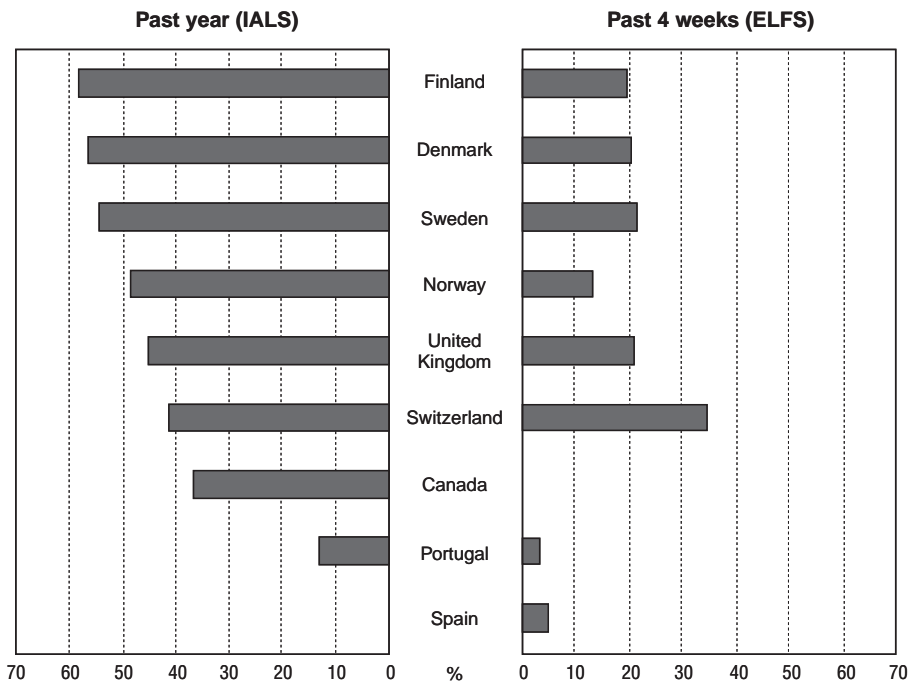
HIGHLIGHTS

Adult learning has taken on a much higher profile in the last decade, as OECD economies and ageing societies are increasingly knowledge-based. High unemployment rates among the unskilled, the increased and recognised importance of human capital for economic growth and social development – together with public interest in improving social and personal development – make it necessary to increase learning opportunities for adults within the wider context of lifelong learning. Depending on the country and context, these opportunities may be related to employment, to the need for basic skills or upskilling, or may respond to social and civic preoccupations. At the same time however, there are strong inequities in terms of access and provision.

It is therefore time to go beyond rhetoric and consider concrete policy answers to expand learning opportunities for all adults. The purpose of this publication is precisely to document the experiences of nine countries in this field.

Participation in adult learning

Percentage of population 25-64 years old in adult learning according to different reference periods



Note: Period of reference is one year for Switzerland in both surveys. Countries are ranked in descending order of total participation rate for IALS data.
Source: International Adult Literacy Survey (1994-98) and Eurostat, European Union Labour Force Survey (2001).

The problems

What is adult learning? The concept of adult learning adopted in this publication encompasses all education and training activities undertaken by adults for professional or personal reasons. It includes general, vocational and enterprise based training within a lifelong learning perspective. Throughout the nine OECD countries participating in this study there is a broad range of possibilities provided by the public and the private sector, education institutions, firms, commercial organisations, NGOs and other community organisations.

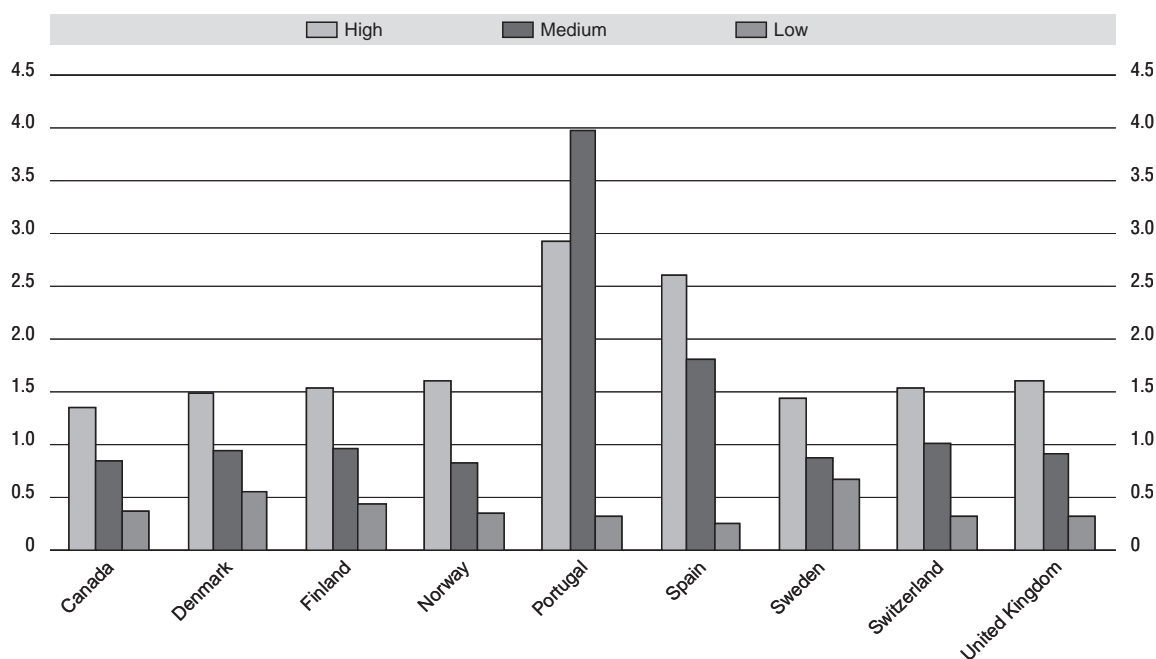
Participation in adult learning varies considerably across countries. In the Nordic countries, the United Kingdom, Switzerland and Canada, at least one out of every three adults participates in some training activity throughout the year (IALS). Similarly, in most of the Nordic countries and the United Kingdom at least one in five adults participated over a one-month period (ELFS). Spain and Portugal have lower participation rates.

Moreover, participation in adult learning is highly unequal among specific population subgroups. Younger adults, those with higher educational attainment, those with jobs or those employed in high-skilled occupations take greater advantage of or have greater access to learning opportunities than others. Age is important, as adults' rates of return to learning have been found to diminish with age and thus act as deterrent to learning. In most countries those aged 25-29 participate most, but active participation does continue until around age 50, at which point there is a considerable drop.

The persons who especially benefit from adult learning are those who have higher educational attainment levels – the higher educated continue learning throughout life. They are *aware* of the benefits, of the need for upgrading and reskilling, and are perhaps more motivated because of the potential returns. In short, learners are in most cases already convinced of the value of learning.

Adult learning by educational attainment

Ratio of participation rates at each educational level to the total participation rates for population 25-64 years old, 2000



Note: Period of reference is four weeks except for Canada and Switzerland, where it is one year.
Source: Eurostat, European Union Labour Force Survey data except for Canada (1997 AETS data).

A high proportion of adult learning focuses on professional upgrading, as the enterprise is one of the main catalysts of training. More than 50% of those who trained did so with employer's support, and employers tend to choose investments from which they expect a high return. Thus training tends to concentrate on workers who are already qualified and enjoy relatively high professional status in large companies. This leaves out low-skilled or older workers, those in small companies, and those on temporary contracts. Larger firms train more, as do firms in the service sector, primarily social and personal services, financial intermediation and real estate.

There are different reasons for low and unequal participation rates. Time constraints are the reasons adults cite most for not being able to undertake learning, especially for non-vocational training. Reflecting work and family commitments, it is difficult to find time to engage in learning courses, especially for those unconvinced of the benefits of learning. Financial constraints are also mentioned as a barrier to undertake training.

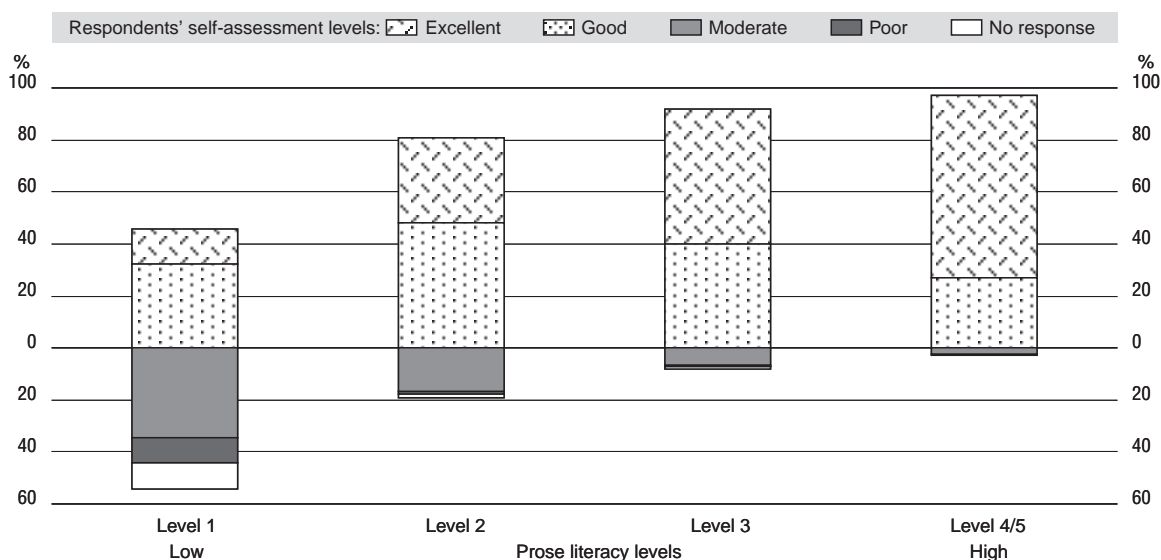
Yet another reason is the fact that often, those adults most in need of education and training are also those least aware of that need or the benefits. Many low educated or low-skilled individuals believe their skills are good or excellent and thus do not see any need to improve. One of the important challenges ahead for policy makers, then, is to assist in revealing the benefits of learning and making learning easy and accessible for adults, especially for the low-skilled.

Even though there is some investment in adult learning from the public and private sectors, it is not enough. Even in the case of highly skilled workers, the return on investment for companies is risky; bearing in mind the possibility of "poaching" skilled labour in imperfect labour markets, companies often prefer to "buy in" skilled labour rather than invest in training. The lack of visibility of the benefits of training outcomes to companies or workers may also be an important factor.

Overall, there are barriers to participation in learning for adults. There is some evidence of unmet demand, with the existence of waiting lists for adult basic education courses in some countries

Self-assessment of reading skills by prose literacy level

Percentage of population 25-64 years old at each self-assessment level by prose literacy level, 1994-98



Source: International Adult Literacy Survey (1994-98).

visited. Hidden unmet demand is not as evident: people with low skills and low levels of education, populations living in distant or rural areas, people with psychological barriers to participation do not make their needs heard. Furthermore, there are institutional barriers: fragmented provision of learning opportunities means that there is a complex diversity of institutions – firms, trade associations, the public education system and private institutions – that provide learning but not in a transparent or coherent manner. There is a range of learning opportunities, but supply is fragmented and there are not enough incentives in place to reach those most in need.

The solutions

OECD Member countries have recognised the need for public intervention in this market, for equity and efficiency reasons. Overall, countries agree on the long-run goals, which include economic and non-economic reasons: the need to target low educational attainment and to intervene for social cohesion and economic growth, to reduce unemployment and for personal and social development. The development of democratic values and the improvement of skills to participate in the economy and labour market are all stated as vital reasons for government participation in adult learning.

Many countries mobilise a variety of resources to support the development of adult learning at different levels. Most have specific adult basic education to provide opportunities for higher educational attainment. There is a wide array of vocational training programmes to improve adults' ability to obtain employment. There are also efforts geared toward training for workers in companies by way of legislation, financial incentives and contractual agreements. The non-profit or community-based organisations are also important suppliers of learning opportunities for adults.

Countries have recently adopted a variety of approaches to target adult learning. These range from general action plans to increase learning opportunities for all adults to more specific programmes designed to upgrade skills, target particular adult sub-groups of the population, or increase training opportunities for those in the labour force. A number of these reforms are also geared towards improving the performance and results of adult learning in a more integrated or holistic approach that is learner-centred. Efforts have been made towards greater system efficiency through providing general frameworks for policy development, improving co-ordination among different (including social) partners, rationalising existing supply, focusing on cost-effectiveness, and taking greater account of individual needs. Decentralisation has been an important aspect of this process. Policy responses vary according to a country's economic and social contexts, the historical development of its education systems, and the political structures and systems in place.

The key: access and participation

Adopting an integrated approach to adult learning policies can address a diversity of issues concurrently. A comprehensive strategy can help OECD governments to improve adult learning opportunities, to raise the efficiency and quality of adult learning provision and ensure better coherence in the delivery of learning. The publication documents in depth desirable features that can shape an integrated approach to adult learning policies. Under the five key ingredients listed below some of the different policy approaches possible are provided.

- 1. Measures and approaches directed towards making learning more attractive to adults can help increase participation.** As already shown, motivation is one of the key issues: learning has to be made attractive to adults. Specific desirable elements can be highlighted:
 - The use of pedagogical methods suited to adults rather than to the young. This implies learning that is learner centred and contextualised to make it relevant to adults' experiences. The *craft school workshops, trade schools and employment workshops* in Spain are a good example. Courses offered by Migros "club schools", a private initiative, play an important role in attracting adults back into learning in Switzerland.

- Flexibility in provision to suit adults' circumstances and schedules. The creation of modular systems, as has been done in Denmark, Switzerland and initiated in Portugal, can assist adults to study at their own pace. ICT and distance education can be effective tools to reach those hardest to reach in a flexible manner. The Mentor Programme in Spain is organised in local centres that provide anytime computer-based, audio-visual and telecommunication resources for adult learning.
 - Outreach policies to reach adults who otherwise might not consider learning, or who have little motivation to learn. The availability of pertinent, up-to-date information, sound advice and guidance suited to the individual needs of adults is key to success. Adult Learners' Week in the United Kingdom, Learnfestival in Switzerland or Opintoluotsi open search service in educational information in Finland are good examples of outreach efforts. Community Access Programme sites throughout Canada are designed to provide adults with access to the information available on the Web.
 - Recognition of prior learning. Assessing and giving credit for knowledge and skills acquired in work, home or community settings can ensure that adults do not waste time relearning what they already know. Portugal's national system for the recognition, validation and certification of school attainment and personal experience is a good practice in this respect.
- 2. As learning is largely related to employment, measures to stimulate employment-related training, in enterprises, for workers and for the unemployed are important.** It may imply acting on several levels to overcome barriers, such as arranging and financing training, reconciling production time and training time, and putting the gains from training to profitable use. Among different key elements to be emphasised are:
- Practices to help workers overcome some of the barriers to training, including time and costs (through, *e.g.*, flexible time management). The rights to education or training leave from work in Finland and Norway are an important incentive for workers to undertake learning.
 - Ensuring access to skills assessment and the possibility of skills development in firms for groups at risk – such as workers who are victims of restructuring, who did not have a proper initial education, or older workers. The Skandia company individual learning accounts initiative in Sweden is worth noting: workers payments into the accounts are matched by Skandia, and are tripled in the case of employees over 45 years old who do not have a higher secondary diploma. Other good practices have been found in enterprises in all visited countries.
 - Public employment services that operate flexible models of public training programmes. Modules, tailor-made programmes, continuous admission and certification have been applied successfully in the public employment service in Norway or through the Vaggeryd-model for labour market training (named after the municipality where it was originally developed) in Sweden.
 - Avoiding the sole criteria of quantitative results when financing training for the unemployed. It may lead to creaming in skills training, since the objective is immediate placement. Quality criteria must also be included in the call for tender.
- 3. Enhancing the financial incentives to invest in the human capital of adults, at the individual and enterprise levels.** Financing of adult learning systems is a complex issue. Funding comes from both public and private sources in all the countries under review. And indeed the consensus seems to be that responsibility for financing should be shared among all partners, exploring co-operative financing mechanisms. In some cases, making individuals participate in the financing, if they can afford it, can also be applicable as a return on the benefits that they receive from participation. Different policy avenues are possible to enhance incentives to invest:
- The introduction of individual incentive mechanisms such as loans, grants or individual learning accounts. In Canada, some of these mechanisms have been used to stimulate adults

to undertake learning opportunities. In the United Kingdom there is a broad range of financial support to encourage individuals to undertake learning throughout the country. In Finland, Norway and Sweden there are individual income support allowances complementary to free provision.

- Offering entitlements for learning or study leave during working hours. Alternation leave in Finland, for example, has a twofold purpose: employees can have leave from work, and unemployed job seekers can obtain work experience.
- The introduction of subsidies to private suppliers or to individuals. Compensation for part of the opportunity costs can help to attain an appropriate level of training. The Danish taximeter system, tax exemptions and subsidies for employer-financed training can be viewed in this light. Financial incentives can also be increased by allowing training to be treated as an investment for taxation purposes rather than an expenditure.
- The establishment of enterprise training levies or the setting up of national or sectoral training funds under specific conditions. The Development of Labour Promotion Act in Quebec, Canada to boost workers' qualifications, skills and performance through continuing training is a measure of the "train or pay" kind.

4. Approaches to improve the quality of adult learning can greatly contribute to increase access and participation. A number of these can focus on quality control and measurement of outcomes. Improvement can be achieved, for example, through better monitoring and evaluation; through improving statistical systems; through better accreditation systems; through better performance evaluation at the institution level; and through better monitoring of student outcomes and graduate destinations. Research in this field is imperative. Different elements may be highlighted:

- The introduction of quality assurance systems. The programmes EduQua in Switzerland and the Programme for Certification of Training Institutions (QUALFOR) in Portugal are interesting examples of monitoring. Many countries have also created institutes in charge of evaluating the quality of education and training, devoted exclusively to adult learning (such as the Norwegian Institute for Adult Education in Norway) or more broadly to all kinds of learning (such as the Danish Evaluation Institute in Denmark).
- Setting standards for service delivery and publicly certifying of the achievement of these standards. The *Investors in People* (IiP) label is awarded to companies that make a recognised training effort in the United Kingdom.
- Including evaluation as an integral part of policy design. Unfortunately, most evaluation of adult learning policies is limited to the measurement of the number of students taught and funding spent, with use of surveys to measure change and learning profiles. Broader evaluation tools to measure effectiveness of policies are not present in many country adult learning policies.
- Providing better support of policy choices requires research and analysis. National efforts in statistical and homogeneous data collection on participation and spending, and research and sharing of best practices at a national as well as an international level can contribute to improve quality of policies and programmes.

5. Adopting a co-ordinated approach to adult learning, by bringing the relevant partners together. Co-ordinating the activities of the different actors can help to rationalise scarce resources and contribute to more efficient public spending. Partnerships are useful tools, as is an outcomes-based approach. Countries are grappling with ways to develop comprehensive and integrated policy frameworks for adult learning. In contrast to the fragmented approach that can be observed in many countries, a holistic approach – encompassing both formal and informal learning as well as general education, vocational education and enterprise training – requires co-ordination. Key ingredients to a co-ordinated policy are:

- Developing a co-ordinated approach in the public adult learning system. Countries have worked towards increasing supply at different levels, rationalise and give coherence to the diversity of offerings, and co-ordinate the different actors involved. In most of these cases, that implies free or near-free provision of formal adult education or other educational opportunities. This is the case with the reforms introduced by Denmark, Finland, Norway and Sweden, and efforts undertaken by Spain and Portugal.
- Co-ordination within government, as well as between government and a wide range of non-government actors such as employers, trade unions, private and public educational institutions, and community groups. Examples of specific institutions to help co-ordinate adult learning policies include ANEFA in Portugal and the Learning and Skills Council in the United Kingdom.
- A balanced interaction between a top-down approach – in which governments define structures and financing procedures – and a bottom-up approach that enables local actors to provide feedback on the problems they face and the innovative solutions that they have found. The Adult Education Initiative in Sweden is an excellent example of this approach. Monitoring the implementation process of reforms is also essential.
- The promotion of partnerships. They have appeared in a number of countries as a means of co-operation and co-ordination. Examples are those developed in Canada or in the Economic Development Agency of La Rioja in Spain.
- Policy processes that co-ordinate well across the sectors and among the many actors involved, that incorporate rational funding mechanisms, and that build monitoring and evaluation into policy development all make systems more effective. These are the aims of the recent adult education and training reform in Denmark.

Such integrated policy frameworks also need to place the individual and the enterprise at the centre – in shaping incentives to participate; in funding mechanisms; in the design of adult learning programmes; and in determining outcomes. They need to make explicit the relative responsibilities of individuals, enterprises and governments within an overall framework. As in initial education, they need to balance goals of economic development with equity goals and social and personal development. They need to recognise the reality that many adults in OECD countries have at best completed lower secondary education; that they often have low levels of basic skills; and that many have been away from formal learning for some years. Overall, countries are moving in the right direction – but there is still a great deal of work to be done.

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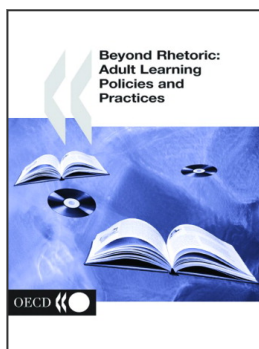
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