

EUA Thema

Consultation on the EC Draft Memorandum on Lifelong Learning

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EXECUTIVE SUMMARY

Introduction

The members of the European University Association (EUA) – national bodies representing higher education (rectors' conferences) and individual universities – responded well to the request for input to the consultation on the Memorandum on Lifelong Learning. This analysis of the response includes the range of opinion from across the continent.

Lifelong learning is a substantive issue, stimulating an exchange of views between a range of actors, and EUA welcomes the Commission's initiative to put forward the draft Memorandum for discussion.

Lifelong learning and higher education

Discussion of the role of higher education in lifelong learning provokes some scepticism, within and outside the academic community. During this consultation, several reasons have been evoked to illuminate why higher education institutions (especially traditional universities), as individual providers of learning or as a collective system, hesitate to embrace fully the concept of lifelong learning. Other factors influence their capacity to offer different types of learning.

In the opinion of EUA, the university should be a central actor in lifelong learning, but the distinctive characteristics of higher education must be preserved and stressed. For example, higher education as a collective system should contribute to reflection on lifelong learning as a concept and as a policy instrument for social and economic change in our societies.

In the face of pressure from international organisations, governments, employers and individuals, formal education and training institutes need the freedom to decide what they will do and with which resources.

The current context of higher education as it affects consideration and practice of lifelong learning

Higher education institutions face increasing competition – for students, for staff, for research, for influence and for funding. The globalisation of the economy and the emergence of virtual learning have created an international higher education environment and prompted governments to rethink how their citizens are educated and trained.

It was a sense of this heightened competitive situation in higher education that spurred ministers of education to sign in 1998 the Sorbonne Declaration and in 1999 the Bologna Declaration, the most significant political initiative at European level affecting the current context of the higher education institutions and the way in which they organise their basic education activities and may consider lifelong learning¹. During this consultation, some EUA members have enquired what the link between the Memorandum and the Bologna process might be.

A new architecture of learning structures is proposed in the Bologna Declaration and is under examination by the higher education community: once implemented, it should be easier for higher education institutions to deliver lifelong learning along flexible learning paths. The Declaration suggests that the first-level degree of higher education (the bachelor's) should be gauged on the basis of the knowledge and competencies acquired rather than the years of study. This approach brings higher education closer to other sectors of education and training in the debate about recognising learning. It opens opportunities for making formal education more flexible and differentiated and for enhancing further its quality.

The more ostensible motivation of the ministers signing the Bologna Declaration was to achieve "a more complete and far-reaching Europe" – presumably more than a Union based on economic convergence only. It is appropriate that governments and international organisations like the EU are preoccupied with the questions of governance and of European

citizenship: how to “educate” citizens of Europe in a broad sense and integrate the different countries around wider goals. This rationale for promoting lifelong learning should be made more explicit in the draft Memorandum.

We agree with the starting point in the Commission working paper that, in the knowledge society, ideas have more power than they have ever had before: being the best is to have the best ideas. Wealth depends on the development and application of new knowledge; social progress depends on the participation of the citizens in political debate; and there is a concern to maintain social cohesiveness. From this vantage point, the lifelong learning movement can be a political response to a wide range of questions, but the universities welcome that the concept looks less exclusively economically-driven. In this scenario, lifelong learning can be better understood as a necessity for all. This argument should be reinforced in the draft Memorandum.

From another angle, lifelong learning can be the driver of the European educational reform agenda. The Bologna process is based on the same premise as the draft lifelong learning Memorandum: that governments are responsible for national education and training systems. The Bologna process has revealed quickly, however, the extent to which implementation of national and European policy takes place in a local context and that when change is envisaged, time and effort are really needed to associate all the actors.

The higher education institutions accept lifelong learning as part of the European Higher Education Area and a responsibility of the institutions. A powerful argument for the higher education institution to take a central role in lifelong learning is that it is closest to the employers in the education chain and has a special responsibility for employability throughout life. The responses to this Memorandum reveal a mixture of institutions taking on a lifelong learning philosophy as a tool to lever change and as a duty. EUA members have put forward an impressive amount and range of information and examples of good practice and innovation. What we are witnessing

is a shift to integrating lifelong learning as the “normal frame of reference”, of which formal education is but one part.²

The six key messages of the Memorandum

The Memorandum seems to have as its primary audience the Member States and, as such, the six key messages are seen as addressed more to governments than to education and training institutions.

EUA members have expressed doubt about the emphasis in the draft document on the individual. We believe that it is only when the individual is able to interact with the learning system – and *vice-versa* – that there will be individual benefit and collective benefit, as well as benefit to the society of which both the individual and the system are part. Lifelong learning should be a social affair.³

It has been demonstrated that the individual, even when very motivated to learn, has a lot of difficulty to articulate his or her learning project, elaborate it, finance it and advance along the learning path, especially when he or she is aiming at acquiring a qualification awarded only at the end of a long study period.⁴ The Memorandum should recognise that individuals need help to construct the learning paths, in particular.

While a major change needs to be wrenched within educational institutions so that they perceive the student more and more as a learning partner, there is a danger of too extreme fragmentation if a collective framework is not always kept in view. The different providers of learning should assist learners along their learning paths, which need to be well-lit and well-connected, as well as flexible.

Key Message 1 — Guarantee universal access to learning for obtaining and updating skills

Higher education institutions have a key contribution to make to the process of defining the skills to be acquired. This process has already started in cooperation with employers, but it is important that the skills are perceived to be for citizenship as much as for employability.

Citizenship is considered usually to be an individual skill, but it is in fact based on an understanding of interaction with other citizens. The citizen and the learner are part of a community and the collective benefits of both citizenship and learning should be stressed more than is presently the case in the draft Memorandum.

EUA would like to draw the Commission's attention to the fact that, in general, people are still preoccupied with basic skills like literacy and numeracy. Some EUA members question the use of the term "basic skills" in the Memorandum and suggest that those identified in Lisbon should be called "lifelong learning" or "key learning skills" instead.

Other generic skills are put forward by EUA members as important for learners today. Special skills are needed when the citizen or employee wishes to be mobile, like better foreign languages, or intercultural communication. Then, as more people are professionally mobile, employers will need to be able to evaluate their skills and compare them across different contexts.

Apart from helping to define the skills to be acquired by learners, higher education institutions should assess which skills they can develop.

It is not higher education institutions that can guarantee universal access to learning. They can, however, facilitate access – when they have the means – and when they are willing to do more to draw in learners. The challenge in all European countries is how to take learning opportunities to non-traditional participants in education and training. We see messages one and six of the Memorandum (provide opportunities close to learners) as closely linked.

Key Message 2 — Raise investment in human resources for lifelong learning

This second message of the Memorandum is key and it can be interpreted in various ways. One angle EUA wishes to stress is that it is essential for governments to invest in training the teachers and the trainers for all stages of

learning. The higher education sector offers an interesting laboratory for experimentation in formal education. As many professors approach retirement, a big turnover in teachers is foreseen. There is an opportunity to define new teaching profiles and skills. Governments could help make teaching careers at all levels more attractive. This would involve in addition to competitive salaries the improvement of staffing levels in some areas. Investment is also necessary in teachers and trainers in informal and non-formal education.

Who should pay for lifelong learning? The answers seem to lie in two domains: (1) how to finance the individual learner, (2) how to finance the learning provider. There are individuals who are willing to pay for learning – these are most often people who have already benefited from formal education at quite a high level and wish to learn further. This situation gives rise to some of the unease that lifelong learning can actually widen the divide between the haves and the have-nots in the knowledge society. It is necessary to differentiate between those who have an income from a job and can pay and those who cannot. It is also necessary to identify the motivated and the non-motivated learners (independently of economic power).

Several countries are reflecting on schemes to help motivate and/or fund the learner: individual learning accounts or career development loans, incentives to learning providers and to companies in the form of special funds or fiscal deductions. EUA endorses the idea for a research project on the social and economic benefits of different ways of investing in lifelong learning and suggests that the research be carried out on different levels: the individual, organisation, region or country.

Key message 3 — Develop teaching and learning methods for lifelong learning

Teaching in lifelong learning contexts has to be tied closely to research into new teaching methods. There is a great amount of experimentation with using ICT at European higher education institutions, sometimes to improve the on-campus learning experience, other times to deliver distance learning. In this

context, there is evidence of efforts to develop new teaching and learning methods.

Key Message 4 — Improve the appreciation of learning, especially non-formal and informal

The Commission paper is a welcome attempt to bridge the divide between the different parts of national systems of education and training and to broaden the parameters of a discussion about learning and the learning society. The Memorandum is right to assert that building bridges across different sectors of formal education is not enough.

Credit systems are a powerful tool to improve the recognition of learning, since the credits may be transferred or accumulated. The advantage of credit systems is that they make it possible to underline the learning path. Within higher education, since university and extra-university institutions have been using modular credit-based courses, student transfer between the two sectors has been greatly facilitated.⁵

Validating prior learning is the other tool to improve the recognition and appreciation of learning, but there is confusion between accrediting prior experience and accrediting prior professional experience, as well as between validating learning with a formal qualification or through other methods. The challenge is to move from case-by-case accreditation of prior learning or of learning in different contexts to a generalised system.

For the higher education community, valuing learning is intimately linked with controlling quality. The debate on accreditation is recent in Europe and still quite confused and controversial. A key question is: what is the optimal way to protect students against fraudulent learning claims?

The certification in one way or another of all knowledge and skills acquired until a certain exit-point could help reduce drop-out rates and failure patterns in formal education, which are worrying social and financial problems in some countries. Such certification might also give European education a competitive advantage internationally.

Key Message 5 — Ensure access to quality information and advice about learning opportunities

People need guidance about learning at all stages of their lives, not just on single courses, but also on possible learning combinations. We propose that the potential learner receives institution independent educational counselling (information and advice) first from a general structure, which could be located at local level. Transnational education, which is expanding dramatically in some disciplines and countries, should be included under the guidance structures: the potential student needs to know especially if a course is accredited or not. Several EUA members recommend that Internet portals be developed. Second, the person receives guidance and help to define their learning project directly from the institution of learning chosen. Careers offices and student counsellors need to receive training to work in a more intensive information managing and guidance context.

Key Message 6 — Provide lifelong learning opportunities as close to learners as possible – in their own communities, supported by ICT, if appropriate

Citizens need learning close to them in at least two senses: close to them in the sense of “attainable” and close to them in the sense of “relevant”; people should be able to see how learning can improve their lives and their “citizenship”, and have access to learning.

Projects to improve access to higher education are underway in several countries, but are not considered sufficient to overcome all barriers to learning. The majority of EUA members are willing to invest in ICT as a tool to increase access by people previously excluded from learning – provided that the digital divide between those who have access to the equipment and those who have not is reduced – because it may help make learning available at a time, place and pace to suit the learner. EUA points out that the institutions cannot bear alone the cost of investing in new technologies. Some countries are debating the launch of an e-

university as a way to reduce development costs of some types of education and to get large-scale benefits.

Lifelong learning can best be delivered through partnership. Many higher education institutions have solid experience of building partnerships for regional development. They have longstanding relationships with organisations in civil society. Upon this basis, they may participate in or even house broadly based centres of lifelong learning meeting the needs of different learners.

Improved statistics

The annex to the Commission paper highlights the present inadequacy of statistics on lifelong learning. The consultation of the EUA members reveals that this is a problem that should indeed be tackled at European level. The approach mentioned in the document, which begins with further work on definitions of lifelong learning, appears appropriate.

A European strategy for lifelong learning

The European dimension of the present Memorandum is too implicit – a European strategy for lifelong learning should amount to more than comparison at EU (or EU-plus) level of national plans and experiences. Each country has its own obstacles to achieving lifelong learning for its citizens, given different histories of development, but there are several problems common to all countries, inside and outside the EU. These questions can have an enhanced European dimension in their responses and could lead, for example, to cooperation and competition (benchmarking) at European/international level. Lifelong learning should be a European activity, inspired by common values, even when interpreted in different ways throughout the continent.

EUA suggests that the universities integrate the changes suggested by the Bologna process into their lifelong learning plans. A European lifelong learning strategy should concentrate on those areas of policy identified for convergence within the Bologna process that are relevant for progress on implementing lifelong learning.

Some EUA members have requested that the Commission reinforce in the draft Memorandum the role of the higher education institutions as partners in any European lifelong learning strategy. To implement a global strategy, action will be required at different levels.

European education and learning systems at all levels need to present an identity based on high quality, positive diversity and transparency. Governments and European higher education institutions should promote transnational education in the context of lifelong learning and increase the links and bridges between European academic and professional education and training.

If Europe does succeed in harnessing its learning potential and generating the ideas needed to contribute to global prosperity, diminished inequalities and global governance, other parts of the world may look to the old continent with new eyes.

Annex: Lifelong learning in higher education in practice

During the consultation, the responses from the EUA members reveal a preoccupation with the daily reality of delivering lifelong learning. Some institutions have an explicit lifelong learning policy; the majority probably do not, for the kind of reasons given at the beginning of the report, and sometimes for other reasons. There is a trend emerging among those that do have a policy to place at its centre the idea that lifelong learning is either “prioritised in the same way as ordinary education” or that it provides the broader framework within which all other education activities are then situated.

This section outlines the main elements of a lifelong learning policy at the level of a higher education institution, however it is structured in the specific institutional context. Those that make lifelong learning part of their regular teaching and learning strategy face the challenge of moving lifelong learning from the margin to the centre and reorganising the institution accordingly.

Even if the activity originates with individuals or in isolated departments, once a policy is put in place, institutional leadership becomes essential, to maintain overall cohesion, ensure coordination between related policies, and to make and sometimes to shift priorities.

Lifelong learning appears to be a driver for change within higher education institutions. It can cause internal and external walls to come tumbling down.

The main elements of a lifelong learning policy in a higher education institution are: (1) designing the policy, (2) organising the institution for lifelong learning, (3) managing lifelong learning, (4) organising the teaching offer, (5) doing research on lifelong learning, (6) staff development, (7) recognising learning, (8) partnership, (10) selling or receiving funding for lifelong learning in other ways.

Conclusion

During this consultation, the most important success factors identified by higher education institutions serious about implementing lifelong learning are that: (1) there has to be an interaction between the different policy levels for lifelong learning, (2) the work has to be placed in a long term perspective and attention given from the beginning to the sustainability of initiatives, including the resource base and quality of the work, (3) there has to be effective partnership. In this sense, the Memorandum identifies the correct “key to success”: “to build on a sense of shared responsibility for lifelong learning among all the key actors.”

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INTRODUCTION

RESPONSE TO THE CONSULTATION

The members of the European University Association (EUA) are national bodies representing higher education (rectors' conferences), as well as individual universities. They number around 630, from 45 countries.

EUA requested its collective members (the rectors' conferences) to react on the European Commission's draft Memorandum on Lifelong Learning and to comment on the impact of national lifelong learning policies on higher education. It asked the individual members for information on their lifelong learning policies and examples of good practice, as well as reactions on the Memorandum.

The Association's members have responded well to the request for input to the consultation, considering the short timetable. Eleven collective members in the EU Member States reacted, and information on the situation in a twelfth Member State was obtained via an individual member. A rectors' conference in an accession country also replied. Sixty individual institutions (more than 10% of the EUA membership) submitted information and examples of good practice – many institutions proffered several examples of lifelong learning provision. Half of these institutions are located in non-EU Member States (in Norway, Switzerland, some of the countries in Central and Eastern Europe, and in Turkey).

PRESENTATION OF RESULTS

This analysis of the EUA members' response includes the range of opinion from across the continent, even if the draft memorandum addresses the EU Member States only.

The report is structured in four parts:

- **Part I: Lifelong learning and higher education** addresses the issue of how higher education positions itself in the debate on lifelong learning and places the discussion in the current higher education context;
- **Part II: The six key messages of the Memorandum** comments on the draft text;
- **Part III: A European strategy for lifelong learning** tries to explore the European dimension of lifelong learning, from the higher education point of view;
- **Part IV: Lifelong learning in higher education in practice** identifies some of the concerns of the institutions working on the ground.

In each part, recommendations follow analysis, which is illustrated with examples of practice. The most important comments and recommendations are highlighted in the *Executive Summary*.

PART I: LIFELONG LEARNING AND HIGHER EDUCATION

What can be the role of higher education in lifelong learning?

This is the question members of the European University Association have asked themselves, as they read the Commission's draft Memorandum on Lifelong Learning. They answered it on the basis of:

- their understanding of the concept;
- their observation of its increased prominence in policy discourse at all levels;
- the link they make to higher education's wider role in society;
- and their experiences with promoting or delivering lifelong learning, as well as their plans for the future.

Discussion of the role of higher education in lifelong learning provokes some scepticism, within and outside the academic community. Inside, some teachers, researchers and administrators express concern that lifelong learning may be an activity separate from the higher education institution's core business of education, research and service to the community and a distraction more than anything else. Outside, international organisations, governments, enterprises, professional associations, non-governmental organisations and the general public sometimes question the desire and the ability of higher education institutions to offer learning different from traditional education. The former believe that higher education should reflect critically on the society of which it is a part, examining new trends with caution. The latter believe that universities are slow to make changes in their ways of doing things. **Lifelong learning is a substantive issue, stimulating an exchange of views between a range of actors, and EUA welcomes the Commission's initiative to put forward the draft Memorandum for discussion.**

During this consultation, several reasons have been evoked to illuminate why higher education institutions (especially traditional universities), as individual providers of learning or as a collective system, hesitate to embrace fully the concept of lifelong learning. Other factors

influence their capacity to offer different types of learning.

First, the difficulties with the concept:

- Lifelong learning implies learning acquired in a public and in a private manner. Higher education in Europe is traditionally a public service. When lifelong learning is perceived to be part of the institution's public service mandate, it is integrated better; when it is seen as more of a private venture, or as serving only fee-paying students, then it is not embraced in the same way. Even if higher education institutions position themselves increasingly according to the logic of a market and if they are motivated to obtain parts of new markets and increase resources, this is often not enough of a reason to place lifelong learning at the centre of their activities. When an institution decides to serve a new type of client, it typically finds itself having to embark on a "double conquest": an external conquest to position itself in the emerging market and an internal conquest to convince colleagues of the legitimacy and value of the initiative.⁶ This is noticeable in the area of continuing education, the forerunner of lifelong learning in the higher education context.
- Lifelong learning implies learning acquired at different levels. The higher education sector can accommodate learning at the "higher" level, but has more difficulty to see a role for itself at other levels. The lifelong learning concept is sometimes regarded with suspicion as an excuse to introduce into the already overcrowded university curricula activities that should be provided elsewhere. The German Rectors' Conference points out that, in Germany, the higher education institutions have concentrated within lifelong learning provision on further professional development, where they esteem that they are best able to contribute, given their particular knowledge and expertise. Through collaboration with firms, they can, in turn, update their knowledge and renew curricula.

- Lifelong learning implies a shift from a supply – to a demand-based organisation of learning. The higher education institution – and teacher – has to begin with the learner and evaluate his or her prior knowledge and skills, and, from there, use the learning project in order to devise a learning path. They should then organise access to learning resources, as well as regular monitoring of progress to results, and such an approach has quite radical implications for the way universities, in particular, organise their teaching. The Association of Swedish Higher Education comments that in its country “the political, social and educational components of the lifelong learning policy are generally accepted. What is new and a challenge for the future is that if a lifelong learning policy is to be implemented, there must be a substantial space of action for the individual learner. This gives a new role to the government and the institutions. One major question is whether the institutions have the capacity and the readiness to use their greater authority to provide opportunities for individual students to fulfil their prospects of lifelong learning.”

Second, the difficulties with the practice:

- The public responsibility of European higher education institutions has become increasingly extensive, complex and important. Universities are expected to contribute to economic growth and social progress in many different ways, but additional resources have not usually accompanied pressure to take on new challenges. In the transition economies of Central and Eastern Europe, higher education is perceived as a tool for economic regeneration and social transformation in a particular way. Higher education institutions in this part of Europe are very aware of the need for retraining people and training people for new professions, as they have been doing, for example, in the areas of finance or law. Their experience should be useful in Western Europe, as big post-war cohorts of employees retire slowly and governments confronting labour shortages try to encourage

workers to retrain and consider importing new labour. But, there is a fear in some higher education institutions in all parts of the continent that to provide lifelong learning to a range of learners is to subtract effort and resources from the until now predominant task of providing initial higher education.

- Different structures offer lifelong learning. In Italy, while there are initiatives by some universities to provide lifelong learning, there has not been a systematic approach to developing it within the university system; rather, it has been organised by the non-university, post-secondary sector. In Ireland, higher education has had a limited role to play in lifelong learning, with university and other higher education institutions’ efforts concentrating almost exclusively on educating the young; but, a new approach to lifelong learning focuses on making higher education part of a system involving all educational sectors. In the Netherlands, adult education has taken place separately from higher education, and particularly from the universities. In 1998, a national action programme for lifelong learning was concerned almost exclusively with the improvement of primary and secondary education.⁷
- Different kinds of institutions have different missions. Some have been created specifically to serve their regions and have an explicit lifelong learning role in that context. But, each higher education institution, independently of its origins, faces new competition for resources and increasingly has to choose its profile and priority areas of activity.
- Some higher education institutions that would like to offer lifelong learning in a comprehensive manner lack the capability. In countries where a different sector has developed adult education and/or other types of lifelong learning, the higher education sector does not have much experience; the institutions are the “new providers” in the field and need a strong motivation to carve a slice of the market. And in fields where the university has expertise,

like in the continuing professional development sector, there is increased competition from individual consultants, enterprises and training organisations of professional organisations, which sometimes have better skills to provide learning.

So, what can higher education best contribute and receive from lifelong learning?

In the opinion of EUA, the university should be a central actor in lifelong learning, but the distinctive characteristics of higher education must be preserved and stressed.

- Higher education as a collective system should contribute to reflection on lifelong learning as a concept and as a policy instrument for social and economic change in our societies.
- The role of higher education is to “renew society through the creation and transfer of new knowledge and competence”.⁸ This alludes to the specificity of the university mission combining research and education. Universities are best placed to do research on lifelong learning. For example, the Austrian Rectors’ Conference points out that it is wise to avoid expensive development of learning methods separately in all the different sectors providing lifelong learning. The university could provide research on learning methods that would be made available to those providing learning in any context.
- This specificity also gives universities the edge in areas of lifelong learning, where a combination of the newest research with experience of its practical application is required (e.g., in the engineering profession). The higher education institution can thus become a place where the learner expects to return to update or supplement initial education. The institutions can instil among younger students an expectation to continue updating their knowledge and skills throughout their lives and stimulate a learning reflex.
- Companies are looking for more targeted, tailor-made learning. The higher education

institutions are well placed to respond to requests for very specific knowledge transfer.

- The university can also experiment with new conceptions of curricula and content and with new modes of delivery.
- Finally, the university can contribute to the construction of new quality assurance and accreditation procedures for lifelong learning in different contexts.

The current context of higher education as it affects consideration and practice of lifelong learning

Increasing competition

Higher education institutions face increasing competition – for students, for staff, for research, for influence and for funding.

- Due to demographic change, fewer students in core undergraduate markets are emerging from the traditional age cohort.
- The average level of education of the European population has increased and the number of adults looking for a higher education qualification can be expected to drop.
- Professors are retiring and need to be replaced by a different kind of teacher.
- More research is being done within companies, more of whom organise their own training too – even going as far at times as to open a corporate “university”.

Therefore, institutions compete more at national, and sometimes international, level. Intra-European competition between higher education institutions is growing in parallel to increased collaboration. Additional competition comes from prestigious as well as lesser-known public or private universities in other parts of the world (notably the US), using advances in technology to increase their share of the global education and training market. “New providers” have emerged, some of which offer transnational education; this can take the form of:

- traditional universities offering distance education, franchising operations and/or establishing branch campuses;
- for profit organisations offering learning;
- learning consortia uniting public and private organisations.

The competition is fuelled to some extent by perceived opportunities for commercial providers of education and training in a change in the demand for learning and in the shift from a provider-led to a demand-led economy of education.

The globalisation of the economy and the emergence of virtual learning have created an international higher education environment and prompted governments to rethink how their citizens are educated and trained. While there are no reliable data on the current size of the transnational education sector in Europe (partly because of the difficulty to agree on what should come under the term), this type of education is particularly present in regions where there are high selectivity rates in traditional education and little diversification.⁹ Transnational education brings, in fact, opportunities and challenges. It can improve access to learning and contribute to diversification of learning paths. It can promote innovation in curricula and delivery methods, intercultural cooperation and healthy competition. Conflict with national education systems surfaces when non-official unregulated providers are not subject to quality control. There is a concern to protect consumers from exploitation, as well as to recognise quality transnational education. Strategies to deal with transnational education should fit with other national education goals to promote lifelong learning, transmit culture or increase competitiveness.¹⁰

The Bologna Declaration

It was a sense of this heightened competitive situation in higher education that spurred ministers of education to sign in 1998 the Sorbonne Declaration and in 1999 the Bologna Declaration, the most significant political initiative at European level affecting the current context of the higher education institutions and the way in which they organise their basic

education activities and may consider lifelong learning.¹¹ **During this consultation, some EUA members have enquired what the link between the Memorandum and the Bologna process might be.**

A new architecture of learning structures is proposed in the Bologna Declaration and is under examination by the higher education community: once implemented, it should be easier for higher education institutions to deliver lifelong learning along flexible learning paths. The declaration proposes a reassessment of the sequential relationship between an initial undergraduate and a postgraduate study phase. It suggests that the first-level degree of higher education (the bachelor's) should be gauged on the basis of the knowledge and competencies acquired rather than the years of study. **This approach brings higher education closer to other sectors of education and training in the debate about recognising learning.** In addition, the sort of tools higher education institutions need to advance on some aspects of lifelong learning should be articulated at the European level:

- mechanisms to make study structures more transparent;
- mechanisms to recognise learning;
- mechanisms to control quality.

Tools such as these are included in the Bologna "process", which is the work being carried out by institutions and governments in order to implement the objectives of the declaration.

The thematic conference of the European Year of Lifelong Learning (1996) called for a Europe-wide, shared vision of higher education. The Bologna process is a possible answer. The Dutch VSNU has commented: "the Bologna agreement starts to support an overall view and policy with regard to future developments in the post-initial phase of higher education." It opens opportunities for making formal education more flexible and differentiated and for enhancing further its quality. In most of the European countries, the idea that an open higher education area should provide possibilities for continuous points of entry, exit and re-entry is gaining a better response.

The more ostensible motivation of the ministers signing the Bologna Declaration was to achieve “a more complete and far-reaching Europe” – presumably more than a Union based on economic convergence only. Given the anti-globalisation, anti-international organisation movement, which has attracted more attention since, **it is appropriate that governments and international organisations like the EU are preoccupied with the questions of governance and of European citizenship: how to “educate” citizens of Europe in a broad sense and integrate the different countries around wider goals.** This rationale for promoting lifelong learning should be made more explicit in the draft Memorandum.

There are clearly social and economic drivers to lifelong learning. The debate is a lot about widening access to learning. The expectation is that people will learn to participate in the knowledge economy and the knowledge society and acquire skills for “employability” and for “citizenship”. **We agree with the starting point in the Commission working paper that, in the knowledge society, ideas have more power than they have ever had before: being the best is to have the best ideas.** Wealth depends on the development and application of new knowledge; social progress depends on the participation of the citizens in political debate; and there is a concern to maintain social cohesiveness. From this vantage point, **the lifelong learning movement can be a political response to a wide range of questions, but the universities welcome that the concept looks less exclusively economically-driven.** In this scenario, lifelong learning can be better understood as a necessity for all. This argument should be reinforced in the draft Memorandum.

From another angle, lifelong learning can be the driver of the European educational reform agenda. Although there was little mention of it in the Bologna Declaration, the most recent statement of ministers, who met in Prague this year, includes lifelong learning as an action area for ministers (and higher education institutions), with a deadline for a progress report by their next meeting scheduled for Berlin in 2003.

The Bologna process is based on the same premise as the draft lifelong learning memorandum: that governments are responsible for national education and training systems. Individual learning should not be limited by borders; countries have to decide how to position their national learning systems, against a European backdrop, and in a global context. To compete, institutions must be less regulated within their national systems, to have the freedom, for instance, to offer lifelong learning on competitive terms at home and abroad: to be able to organise courses in a flexible way (individually designed, at different times, partly campus-based, partly Internet-based, partly work-based, etc.). The Bologna process has revealed quickly, however, the extent to which implementation of national and European policy takes place in a local context and that when change is envisaged, time and effort are really needed to associate the actors: the people in the higher education institutions, schools, non-governmental organisations, etc..

The higher education institutions at their conference this year on the Bologna process recalled that their “...primary motivation to construct a European Higher Education Area is so that citizens...can benefit concretely from it and use their qualifications throughout the region and beyond”. The conference statement highlights lifelong learning as part of the European Higher Education Area and a responsibility of the institutions. A powerful argument for the higher education institution to take a central role in lifelong learning is that it is closest to the employers in the education chain and has a special responsibility for employability throughout life.

Conclusion

The responses to this memorandum reveal a mixture of institutions taking on a lifelong learning philosophy as a powerful tool to lever change and as a duty. Initiatives at governmental level, such as the plan for Individual Learning Accounts in Sweden, may result in an increased demand for higher education, which the institutions cannot reasonably ignore. Even if many European institutions have not yet gone down the road of

implementing a complete lifelong strategy, they are proud to put forward an impressive amount and range of information and examples of good practice and innovation, the sum and seriousness of which should leave no doubt as to the willingness of the sector:

- to reach out to new learners;
- to innovate in teaching methods;
- to learn themselves as organisations; and,
- to work in partnership with other stakeholders.

What we are witnessing is a shift to integrating lifelong learning as the “normal frame of reference”, of which formal education is but one part.¹² This approaches the affirmation in the draft Memorandum: “Lifelong learning is no longer just one aspect of education and training; it must become the guiding principle for provision and participation across the full continuum of learning contexts.”

In the face of pressure from international organisations, governments, employers and individuals, formal education and training institutes need the freedom to decide what they will do and with which resources. Even if there are no clear limits between the roles of the different actors, it could be agreed that:

- the individual is responsible for his/her own learning motivation and activity;
- employers should pay more attention to their employees’ learning motivation and aims;
- governments should promote lifelong learning understanding and attitudes as a precondition to everything else.¹³

Education institutions at all levels should develop lifelong learning products, partnerships and networks, while all of the actors must work on recognising more learning and the related necessary quality assurance. The ways in which progress in each of these areas might be achieved receives some attention in the following comment on the Memorandum.

PART II: THE SIX MESSAGES OF THE MEMORANDUM

The memorandum seems to have as its primary audience the Member States and, as such, the six key messages are seen as addressed more to governments than to education and training institutions.

The social dimension of lifelong learning

EUA members have expressed doubt about the emphasis in the draft document on the individual. We believe **that it is only when the individual is able to interact with the learning system – and vice-versa – that there will be individual benefit and collective benefit, as well as benefit to the society** of which both the individual and the system are part. This society is increasingly dependent on the positive results of research and education (teaching and learning). Lifelong learning should, therefore, be a social affair.¹⁴

It has been demonstrated in countries like France or the United Kingdom that the individual, even when very motivated to learn, has a lot of difficulty to articulate his or her learning project, elaborate it, finance it and advance along the learning path, especially when he or she is aiming at acquiring a qualification awarded only at the end of a long study period.¹⁵ *The Memorandum should recognise that individuals need help to construct the learning paths, in particular.*

It is an over-simplification to state as the draft Memorandum does that “education and training systems should adapt to individual needs and demands rather than the other way around.” **While a major change needs to be wrenched within educational institutions so that they perceive the student more and more as a learning partner, there is a danger of too extreme fragmentation if a collective framework is not always kept in view.** The different providers of learning (the institutions of formal, informal and non-formal learning – the schools, colleges, universities, community groups and other NGOs) should assist learners along their learning paths, which need to be well-lit and well-connected, as well as flexible. **If there is a concern on the one hand to dismantle institutional barriers to individuals, there is a concern on the other that those**

citizens may also receive support. An optimal approach probably lies in the parallel development of individual ambitions and individuals’ ability to organise their learning paths with institutional learning and institutions’ increased ability to integrate individual learners. Learning should be considered as a holistic experience, more than the sum of the different parts acquired by the individual throughout life.

Key Message 1: Guarantee universal access to learning for obtaining and updating skills

Higher education institutions have a key contribution to make to the process of defining the skills to be acquired. This process has already started in cooperation with employers, **but it is important that the skills are perceived to be for citizenship as much as for employability.** Individuals should not be led into thinking that their lifelong learning has to be all about acquisition of employability skills and being “productive”. The university can be a place where the value of citizenship can be stressed. Citizenship is considered usually to be an individual skill, but it is in fact based on an understanding of interaction with other citizens. **The citizen and the learner are part of a community and the collective benefits of both citizenship and learning should be stressed more than is presently the case in the draft Memorandum.** **Most importantly, citizenship and learning are not solely the responsibility of individuals, but of individuals interacting with institutions.**¹⁶

While highlighting the new basic skills agreed at the European Council in Lisbon (ICT (digital literacy), languages, a technological culture, entrepreneurship, and social skills), the Memorandum points out that traditional basic skills continue to be important. *EUA would like to draw the Commission’s attention to the fact that, in general, people are still preoccupied with basic skills like literacy and numeracy, areas in which the populations of EU Member States do not always fare well during OECD reviews.* In Denmark, the current reform of the vocational education and continuing training system has as one of its main objectives to improve opportunities for those with the lowest levels of

education. This should be achieved by strengthening the basic skills of reading, spelling and arithmetic through preparatory adult education, to take place in the workplace. **Some EUA members question the use of the term “basic skills” in the memorandum and suggest that those identified in Lisbon should be called “lifelong learning” or “key learning skills” instead.**

A Universities UK (former CVCP) report on skills development in higher education identified the following skills making up employability:

- traditional intellectual skills: critical evaluation of evidence; the abilities to argue logically, apply theory to practice, model problems qualitatively and quantitatively and challenge assumptions;
- new skills: e.g., communication, ICT, working with others;
- personal attributes: creativity, flexibility, etc.;
- knowledge about how organisations work.

EUA joins Universities-UK in welcoming the new weight given in the Memorandum to social skills in comparison with skills for “wealth creation”.

Other generic skills put forward by EUA members as important for learners today include:

- the ability to learn, e.g. by managing the increasing amount of information available at an increasing pace and transforming it into knowledge;
- problem solving;
- networking.

Special skills are needed when the citizen or employee wishes to be mobile, which is increasingly the case. As the economy becomes more global, a European labour market is becoming more real. Young people realise that Europe is a space where national borders are becoming less important (due mainly to the achievements of the EU, notably in freeing the movement of goods, services and capital, and, currently, most tangibly, with the introduction

of the Euro). And the EU education, training and youth programmes have reinforced the idea that studying or working abroad for even a short period is an effective way of preparing for an increasingly international professional life. The mobile citizen requires skills like better foreign languages, or intercultural communication. Then, as more people are professionally mobile, employers will need to be able to evaluate their skills and compare them across different contexts.

Apart from helping to define the skills to be acquired by learners, higher education institutions should assess which skills they can develop. The biggest choice is usually whether to integrate the acquisition of such skills within regular teaching or whether to try and provide some in a separate procedure. Some in universities argue that the general elements in higher education should be emphasised at the basic level and that specialisation should be left to a more advanced academic level or later lifelong learning programmes. Another method is to include more multi-disciplinarity at the first level of higher education, so that learners acquire already some of the “transferable” skills (such as the ability to communicate with specialists from other fields). Whatever the approach – or mixture of approaches – chosen, the institution should monitor the results.

It is not higher education institutions that can guarantee universal access to learning. They can, however, facilitate access – when they have the means – and when they are willing to do more to draw in learners. There is a latent demand for higher education that could be triggered by the institutions. The challenge in all European countries is how to take learning opportunities to non-traditional participants in education and training. Governments are concerned about the social inequality of participation in higher education, despite the great expansion in overall student numbers. We see messages one and six of the Memorandum (provide opportunities close to learners) as closely linked.

The University of Aberdeen offers access programmes to people without traditional higher education entry qualifications. It offers specialist programmes to candidates with additional problems, e.g., those who have been unemployed a long-time or had mental health problems.

Comenius University Bratislava, in partnership with the Universities of Groningen and Leeds, offers a one-year course for school-leavers who were not successful in being admitted to a university and want to try again the following year.

Dublin City University (DCU) has a range of initiatives to attract learners from disadvantaged backgrounds. It has organised a festival, “North Dublin loves Learning”, with community groups and local training partnerships. DCU has also a “North Dublin Learning Network” (based on a Glasgow initiative), aimed at increasing access to adult learning, in partnership with other bodies. During a course in “Neighbourhood Planning”, eight DCU staff volunteer mentors worked on a weekly basis with a women’s resource group and organised access to library facilities. As part of the course, the university hosted two seminars with partners from France and Italy.

Key Message 2: Raise investment in human resources for lifelong learning

This second message of the Memorandum is key and it can be interpreted in various ways. One angle EUA wishes to stress is that **it is essential for governments to invest in training the teachers and the trainers for all stages of learning**. “In a European strategy for lifelong learning, the continuing education of teachers must be given a high priority” (Austrian Rectors’ Conference). The institutions themselves cannot invest all the money necessary.

How shall we train the knowledge and learning developers in the future? **The higher education sector offers an interesting laboratory for experimentation in formal education**. As many professors approach retirement, a big turnover in teachers is foreseen. There is an opportunity to define new teaching profiles and skills, but to attract good people, the majority of European universities still face the problem of better salaries being offered in other sectors.

If an economic stimulus can be given to the teaching profession, lifelong learning may have the potential to attract more candidates, because it can motivate them to be able to pursue their own development.¹⁷ This could, in turn, be a stimulus for lifelong learning. But, as the nature of the teaching profession, its remuneration and development possibilities would change, the leadership would have to find better ways to promote institutional cohesion, which is challenged already through the process of hiring more part-time professional teachers/learning facilitators. Institutional cohesion is important, because institutions should maintain an overall sense of purpose and staff should see how their individual efforts contribute to the whole enterprise of learning. Governments could help make teaching careers at all levels more attractive. This would involve in addition to competitive salaries the improvement of staffing levels in some areas. Investment is also necessary in teachers and trainers in informal and non-formal education.

Manchester Metropolitan University is carrying out a survey of the academic and professional development needs of its academic staff.

The Technical University of Liberec and Charles University in Prague offer a two-year distance study course of special pedagogy for nursery school teachers and tutors. The course is accredited by the Ministry of Education.

The draft Memorandum broaches the broader question of **who should pay for lifelong learning**, a theme on which the members of EUA were eager to respond. The answers seem to lie in two domains:

- how to finance the individual learner;
- and how to finance the learning provider.

To some extent, there is a “solvent” demand for lifelong learning.¹⁸

There are individuals who are willing to pay for learning – these are most often people who have already benefited from formal education at quite a high level and wish to learn further. This situation gives rise to some of the unease that lifelong learning can actually widen the

divide between the haves and the have-nots in the knowledge society. **It is necessary to differentiate between those who have an income from a job and can pay and those who cannot.** It is also necessary to identify the motivated and the non-motivated learners (independently of economic power).

Schemes to help fund the learner

Several countries are reflecting on schemes to help motivate and/or fund the learner. In Sweden, the proposal for individual learning accounts under discussion would make the accounts available to all employees and company owners, who should be able to save in them up to one “base amount” per year (around 4000 euros in 2002). This amount would be subject to tax relief. Individuals and employers might then contribute to the account, with the employers’ contributions being offset against the account holder’s tax liability. Employers would receive a 10% reduction in payroll tax of the amount contributed to the learning account and there would be a similar reduction for social security charges paid by the self-employed. Funds withdrawn and used for learning would be treated as taxable income, but with some tax reduction.

The British government provides several funding opportunities for lifelong learners. Individual learning account incentives can be accessed to finance some learning costs, including some activities that do not necessarily lead to a qualification, but higher education courses are excluded. Career development loans are awarded to learning providers for their trainees.

In Denmark, individuals enrolled in continued and advanced training programmes will continue to receive public funds. In the case of adult education at advanced level, individual fees should complement State financing. The social partners will be responsible to a large extent for deciding the funding model for adult education and training. They will be members of a new Labour Market Institute for Financing Education and Training, which should make recommendations for expenditure in the field. It may recommend that companies contribute more to very specialised education and training programmes, or that employers co-finance adult and continuing education.

In Ireland, in order to reach the aim of increasing the intake of adult students to higher education, full-time (and in the future some part-time) undergraduate adult students are eligible for free fees. The government has also established a fund to encourage the higher education institutions to innovate in attracting adults.

In the Netherlands, where the State does not fund lifelong learning activities of adults, but there are some fiscal deductions, the focus has been on including the funding of lifelong learning in the collective bargaining agreements between employers and trade unions. There have been agreements for the establishment of education and training funds for some sectors and paid educational leave is being introduced in some large firms.

In Germany, time as well as finance is being considered in the reflection about how to best support individual learners. For example, employees might be given time off work to attend courses.

EUA endorses the idea for a research project on the social and economic benefits of different ways of investing in lifelong learning and suggests that the research be carried out on different levels: the individual, organisation, region or country. For instance, at the level of a company, the measurement of input and output could entail:

- analysing what knowledge means to the company;
- what type of added value it produces;
- where its knowledge capital resides;
- how to measure, evaluate and develop intangible capital assets.¹⁹

At the level of the learning provider, the focus of the research could be on how to sustain its efforts; at the level of the individual, it might be on how to support the learning project, etc.

Key message 3: Develop teaching and learning methods for lifelong learning

The development of flexible learning places more emphasis on self-directed learning. This demands that teachers acquire new skills to focus less upon the transfer of knowledge and more on how to facilitate the student’s learning in different contexts. The integration of learning in the workplace or in non-formal contexts also requires new pedagogical skills for teachers in

formal education. Teacher and trainer training is required, notably for those who teach in non-formal contexts.

Teaching in lifelong learning contexts has to be tied closely to research into new teaching methods. The open universities, like the Open University in the UK, have been developing teaching and learning methods for use in their contexts. For example, the OU in the Netherlands uses a “navigation methodology” emphasising learners accessing and using

knowledge from a variety of sources. These approaches can be applied in other learning scenarios.

There is a great amount of experimentation with using ICT at European higher education institutions, sometimes to improve the on-campus learning experience, other times to deliver distance learning. In this context, there is evidence of efforts to develop new teaching and learning methods.

The University of Oulu is analysing its courses by looking at three types of content (core content, complementary content and specialised content) to help develop the curriculum in a lifelong learning perspective.

“100 Online” is a project at the University of Stuttgart to increase awareness among the teaching staff of the new technological culture in teaching and learning. At least 100 lectures, seminars or exercises will be made available electronically. Introductory courses give technical and didactical support on how to produce multimedia sequences and incorporate them into teaching.

Governments in some parts of Europe are encouraging the higher education institutions to invest in using ICT in teaching and learning. The Flemish department of education has a programme of incentive funding for innovative projects in university education. In Austria, where ICT is seen as a tool to increase lifelong learning possibilities, a New Media Forum brings together people from the universities and the Fachhochschulen with experience of using new media in learning. The Forum coordinates the development and testing of models. There is a steering group with Forum representatives and people using new media in other contexts. In Germany, a programme to promote new media in education aims at integrating new media as teaching, learning, work and communication tools in the classroom and hopes to produce quality teaching and learning software for use in higher education, professional and school contexts.

Key Message 4: Improve the appreciation of learning, especially non formal and informal

Key message four, that more types of learning should be recognised and valued, can be situated in the context of employers looking for more information on the types of knowledge, skills and experience of potential employees. Students are also looking for qualifications and

skills that are recognised and can be used throughout the continent.

The Commission paper is a welcome attempt to bridge the divide between the different parts of national systems of education and training and to broaden the parameters of a discussion about learning and the learning society. The memorandum is right to assert that building bridges across different sectors of formal education is not enough. Universities UK applauds the emphasis given in the Memorandum to non-formal learning, in particular:

- the importance given to civic and community learning;
- more scope for non-accredited programmes;
- and the significance attached to collective as opposed to individual learning benefits.

Credit systems

Credit systems are a powerful tool to improve the recognition of learning, since the credits may be transferred or accumulated. ECTS, the European Course Credit Transfer System, established to facilitate student exchange, led the way.²⁰ It is a framework within which institutions agree to recognise quite automatically study courses and thus facilitate credit transfer. Credit points are assigned to study programmes. Even if the system took a long time to gain acceptance and it is still not always applied completely, the tools have

proved effective and ECTS has made a noteworthy contribution to making curricula more transparent and to facilitating recognition of study. An overarching European credit accumulation and transfer framework could now be applicable within all sectors of higher education and cover all forms of learning. It should, nevertheless, respect institutional autonomy to award credit or not. The European Commission feasibility study on developing ECTS into a credit accumulation system to encompass different types of learning argues for a new credit-based lifelong learning framework that would:

- include professional, vocational and corporate qualifications
- be designed for use outside the EU (particularly in view of the scheduled enlargement)
- permit integration of students into degree programmes on the basis of accreditation of prior experiential learning.

The report concluded that it is feasible to extend ECTS, but recommended that “the development of a European credit-based lifelong learning framework should be connected to existing Commission initiatives to link existing national quality assurance mechanisms”.²¹

In Italy, a 1999 law provides for the redesigning of the curricula in all the universities in credits, which can be both accumulated and transferred. Universities can also recognise credits based on professional training or acquired in post-secondary programmes. **The advantage of credit systems is that they make it possible to underline the learning path** – whether it includes education at higher education institutions or dispensed by other bodies. But, it is important to pay attention to fears expressed within the higher education community that a credit accumulation system creates a framework, within which the student is free to mix credit from different types and levels of education and then demand a qualification; this would not guarantee the intellectual development associated with obtaining qualifications.²² But, since it is the higher education institution that decides to validate study programmes and award a qualification (or not), credit-based curricula do not appear incompatible with a structured, progressive learning experience.

Within higher education, since university and extra-university institutions have been using

modular credit-based courses, student transfer between the two sectors has been greatly facilitated.²³ “There is a need to develop a credit system that takes into account competencies (widely used in vocational education and training) that is compatible with a credit system based on workload (currently used in higher education)”.²⁴ The fact that education is being delivered in more different ways makes notional time measures of credit increasingly problematic. A pilot project to see how to measure student workload in terms of learning outcomes, knowledge, skills and competencies in five disciplines is being launched with the support of the Commission. EUA recommends that the work to be done in that project to examine in each discipline commonly accepted professional profiles, levels of study and curricula be followed closely. It is clear that the development and introduction of any credit-based lifelong learning framework will be a complex process, requiring dialogue between European higher education institutions, initial education providers, professional bodies and employers.

Validating prior learning

Validating prior learning is the other tool to improve the recognition and appreciation of learning, but there is confusion between accrediting prior experience and accrediting prior professional experience, as well as between validating learning with a formal qualification or through other methods.

Presently, quite a lot of learning is not accredited. An example is in Flanders, where systems of vocational training outside the formal education system cannot award diplomas or other qualifications. Further, there is no transferability of credits from these vocational training systems and the general or vocational education system. Another example is in Ireland, where most universities have traditionally offered adult education courses, many of a general interest character, but not leading to significant qualifications. Recently, the National University of Ireland has given accreditation at certificate level to some such courses. The establishment of a National Qualifications Authority in Ireland, operative since last year, is expected to be a catalyst in promoting the accreditation of prior learning and workplace experience. In France, there have been significant advances in the

accreditation of experience by the higher education institutions in the last twenty years. There has been a tendency to centralise decisions in this area, as university leaders integrate to their training policy the idea of accrediting prior learning. But, once again, some institutions have worked more on this question than others. Now, a law on “social modernisation” is being discussed by parliament, opening new possibilities for the recognition of professional learning.

The challenge is to move from case-by-case accreditation of prior learning or of learning in different contexts to a generalised system. This implies for higher education institutions to:

- accept to recognise institutionally what has been gained in a non-institutional context;
- develop understanding of the type of learning acquired differently, so as to be able to evaluate its results;
- change the concept of the student, so that he or she becomes more of an equal partner in the learning process and its recognition.

These are quite revolutionary perspectives and this domain is particularly sensitive for higher education teachers. To recognise learning acquired in non-formal contexts is to recognise that their role is no longer that of a “distributor” of knowledge, but more as an “organiser”, who helps the individual to structure knowledge learned in a non-organised fashion away for the institution. One way forward may be to organise accreditation by field of study. Even if there are more multi- and interdisciplinary studies, many are still disciplinary.

The Università Cattolica del Sacre Cuore di Milano offers teachers of all levels a course in the quality evaluation of training contexts, which has proved helpful for teachers measuring learning.

The University of Porto cooperates with institutions in Spain, Belgium, the United Kingdom and Hungary in developing practical guidelines for step-by-step quality assurance in open and distance learning.

The technical universities in Poland are collaborating to accredit high-school learning profiles.

Accrediting learning

In addition, there are accreditation activities in many countries, carried out by a national agency or through mutual agreements between institutions. The only European-wide accreditation initiative is the EQUIS model for business education, launched by the European

Controlling quality

For the higher education community, valuing learning is intimately linked with controlling quality. The German Rectors’ Conference stresses that the important reflection needed on accrediting learning leading to qualifications must be accompanied by discussion on quality assurance and development not just for basic higher education, but also in the realm of continuing education. In nearly all European countries, some form of external quality assurance of research and of teaching, with a focus on responsibility towards the learner, is now generally accepted as an essential part of accountability and is in operation. Such quality assurance can serve:

- to improve the quality of learning;
- facilitate recognition;
- and help increase mobility of learners.

The growth and variety of evaluation activities prompted the creation in 1999 of the European Network for Quality Assurance in Higher Education (ENQA), founded on a recommendation of the European Council of Ministers of Education. The network assembles national quality assurance agencies to exchange information and experiences and to develop jointly their work. It is expected to play a role in the future in monitoring and exchanging information and good practice related to quality assurance for transnational education.

Foundation for Management Development. The question of external accreditation of courses and institutions is increasingly raised in the context of quality assurance, because evaluation without certification is perceived as unfinished business for those who wish clear information about minimal quality standards of qualifications, including transnational ones. But, the debate on

accreditation is recent in Europe and still quite confused and controversial. Accreditation is a process and a status: it gives the opportunity and incentive for improvement and provides public certification of acceptable quality.²⁵ **A key question is: what is the optimal way to protect students against fraudulent learning claims?**

The certification in one way or another of all knowledge and skills acquired until a certain exit-point could help reduce drop-out rates and failure patterns in formal education, which are worrying social and financial problems in some countries. Such certification might also give European education a competitive advantage internationally.

At the Université des Sciences et Technologies de Lille, a lot of thought has been given to information and welcoming learners. Specially trained staff in decentralised offices work with other organisations and with companies to complement classical communication channels.

At the Catholic University of Leuven, specially appointed staff mediate between the lifelong learning market (companies, schools, hospitals, welfare institutions, etc.) and the university, identifying needs and offering tailored packages to meet the demand.

Several EUA members recommend that Internet portals be developed and the question was raised as to how the Commission's planned Gateway to the European Learning Area, to provide better public online access to information on learning opportunities throughout Europe, was progressing. Examples of websites that try and collate information on a range of learning opportunities are www.lifelonglearning.co.uk, of the British Department for Education and Skills, offering LearnDirect, a free learning and career information service; the Austrian Universities' Continuing Education Network (www.aucen.org), a database which can be searched by university, subject or course; or the IT4U site (www.it4u.ocg.at), in the field of information technology, covering courses given in different types of institutions and at different levels. This site may be searched under the level of the training, the type of organisation and the region within Austria – and it includes the European Computer Driving Licence.

EUCEN, the European University Continuing Education Network, in its preliminary response

Key Message 5: Ensure access to quality information and advice about learning opportunities

People need guidance about learning at all stages of their lives, not just on single courses, but also on possible learning combinations. We propose that the potential learner receives institution independent educational counselling (information and advice) first from a general structure, which could be located at local level. Transnational education, which is expanding dramatically in some disciplines and countries, should be included under the guidance structures: the potential student needs to know especially if a course is accredited or not. Second, the person receives guidance and help to define their learning project directly from the institution of learning chosen. Careers offices and student counsellors need to receive training to work in a more intensive information managing and guidance context.

to the Memorandum highlights the work it has carried out in different projects on guidance and counselling and recommends that that it be taken into account.

Key Message 6: Provide lifelong learning opportunities as close to learners as possible – in their own communities, supported by ICT, if appropriate

Citizens need learning close to them in at least two senses: close to them in the sense of “attainable” and close to them in the sense of “relevant”; people should be able to see how learning can improve their lives and their “citizenship”, and have access to learning.

A number of projects are underway in the UK to improve access to higher education. Government initiatives such as the Excellence Challenge have concentrated on developing the supply side for widening participation (e.g., giving universities money to help recruit from under-represented groups). Individual institutions have been at the forefront in the

attempt to provide learning opportunities closer to learners, working with other agencies to develop access pathways and developing systems for valuing prior learning. There is now discussion about moving towards developing the demand side by concentrating on developing aspirations among a wider range of disadvantaged groups. An example would be to encourage graduates from under-represented

groups to become champions for lifelong learning in disadvantaged areas. In Ireland, each of the universities has a scheme for liaising with disadvantaged schools in its region and providing access programmes for disadvantaged students. But, this is not considered sufficient to address the problem of social disadvantage in higher education.

The University of Teesside's "Developing Progression Pathways" project aims to develop routes to learning through provision in the community and at outreach locations. A strong emphasis is placed on providing guidance to learners on progression and next steps in learning. The project associates seven further education colleges, six sixth-form colleges and two careers services.

A TEMPUS project in Slovakia focuses on developing "Excellence of Territory" and offers courses to public officials in their regions.

The use of information and communications technology (ICT)

The majority of EUA members are willing to invest in ICT as a tool to increase access by people previously excluded from learning – provided that the digital divide between those who have access to the equipment and those who have not is reduced – because it may help make learning available at a time, place and pace to suit the learner. Local meeting places with computers and tutors must be provided, perhaps through public-private partnerships. Distance learning was one of the mechanisms highlighted in the reaction of the EUA collective members to the draft text. It is associated with:

- flexible learning (in time and space);
- as well as with widening access to formal education (mainly to people lacking the academic qualifications required for entry to higher education);
- and choice of education.

The German Rectors' Conference believes that increased use of ICT for lifelong learning should indeed enable the higher education institutions to reach out and serve different kinds of publics. But, **EUA points out that the institutions cannot bear alone the cost of investing in new technologies.**

Some countries are debating the launch of an e-university as a way to reduce development costs of some types of education and to get large-scale benefits. In Sweden, an e-university on the dual-mode model (distance learning accompanied by campus-based education) is under consideration. All the universities and

university colleges showing an active interest in distance learning, working with pedagogical issues and offering quality assurance for this kind of education, could participate in its development. In the Netherlands, the Open University was established originally as an alternative route to higher education for adults without formal qualifications. It has developed, however, into an institution largely serving the continuing education needs of well-qualified adults. In Ireland, in 2000, a major national conference was convened by the Higher Education Authority and the National Distance Learning Centre (OSCAIL) to examine how the potential of open and distance learning (ODL) could be harnessed for a national strategy on ODL in higher education, in the context of lifelong learning.

Partnership

Lifelong learning can best be delivered through partnership. The British University for Industry is a public-private partnership being developed to provide more learning opportunities, many on-line. In Flanders, most adult education schools and centres are funded by the Flemish department of education and local authorities, as well as through partnerships with employment services and vocational agencies, in European projects, etc.

Many higher education institutions have solid experience of building partnerships for regional development – covering human resource development, economic development, cultural development and communications.

They have longstanding relationships with organisations in civil society: trade unions, community groups, voluntary associations, social movements and adult education providers. *Upon this basis, they may participate in or even house broadly based centres of lifelong learning meeting the needs of different learners.*

In the United Kingdom, learning towns and cities are expected:

- to promote learning widely;
- to develop local partnerships,
- and to support and motivate individuals and employers to participate in learning.

This should result in widened participation in lifelong learning and learning being used to promote social and economic development. Learning partnerships develop local learning targets linked to the establishment of national learning targets. Further education colleges, career services companies, training and enterprise councils, local authorities, schools, local organisations and employers can all be

involved. In Germany, the national “Lifelong Learning for all” action programme has at its heart an initiative for the “learning region-the promotion of networks”.

Improved statistics

The annex to the Commission paper highlights the present inadequacy of statistics on lifelong learning. The consultation of the EUA members reveals that this is a problem that should indeed be tackled at European level. The approach mentioned in the document, which begins with further work on definitions of lifelong learning, appears appropriate.

Statistics should then be collated on numbers of lifelong learners enrolled in different learning contexts, ages of learners in learning schemes at different levels, financing from different sources, non-completion rates in different learning contexts, etc..

PART III : A EUROPEAN STRATEGY FOR LIFELONG LEARNING

What does a European dimension of lifelong learning really mean?

The European dimension of the present Memorandum is too implicit. One criticism is that a **European strategy for lifelong learning should amount to more than comparison at EU (or EU-plus) level of national plans and experiences** (*"comparaison n'est pas raison"*). Is there a way to move towards and beyond European compatibility of instruments for lifelong learning, such as learning portfolios of qualifications or self-assessment of knowledge levels, to European comparability? Each country has its own obstacles to achieving lifelong learning for its citizens, given different histories of development, but there are several problems common to all countries, inside and outside the EU:

- how to transform the increasingly blurred divide between different education sectors into clear windows of opportunity for individual learners;
- how to improve credit transfer and accumulation;
- how to progress in assessing quality.

These questions can have an enhanced European dimension in their responses and could lead, for example, to:

- cooperation and competition (benchmarking) at European/international level between organisations doing research on lifelong learning topics;
- different types of organisations networking when developing validation of prior experience procedures, quality norms or training procedures;
- common modules for delivering learning, especially at the level of basic skills;
- networking to exchange experiences and good practice in the use of ICT in a lifelong learning perspective;
- learning cities and regions exchanging good practice at European level.

Lifelong learning should be a European activity, inspired by common values, even when interpreted in different ways throughout the continent.

EUA suggests that the universities integrate the changes suggested by the Bologna process into their lifelong learning plans. A European lifelong learning strategy should concentrate on those areas of policy identified for convergence within the Bologna process that are relevant for progress on implementing lifelong learning. A difficulty is that while more convergence emerges on certain aspects of education policy in Europe, diversity grows at the same time. Lifelong learning is a good example: there are more and more diverse lifelong learning activities being offered by universities, but little policy convergence on issues such as who pays, what is recognised, etc.. Increased diversity in student profiles has resulted already in the last twenty years in the emergence of a vast range of new study options and combinations, of more flexible and modular design, and more distance learning.²⁶

If the recent trend towards deregulation of higher education continues, this will result in even more diversification, and an even greater need for clear information. The proliferation of courses on offer, when not accompanied by a transparent explanation, confuses the potential learner, who must be able to understand the variety of learning so as to be able to choose between settings (formal or non-formal, for example), qualifications (or not) and courses. Individuals are entitled to a choice of learning arrangements, which includes the content of the curriculum, alternative learning paths, new methods of teaching and learning, etc. European convergence should be stimulated at the level of:

- *conditions and constraints (legal frameworks, financing learning)*
- *modalities (developing lifelong learning paths and approaches)*
- *social integration (developing activities relevant to the community, as well as to the individual).*

Some EUA members have requested that the Commission reinforce in the draft Memorandum the role of the higher education institutions as partners in any European lifelong learning strategy. To implement a strategy, action will be required at different levels and each of the actors must try and work out which obstacles to successful lifelong learning they can overcome on their own (individually or by collaborating with like-minded organisations)

and which require action from other partners. For example, the higher education institution facing a problem of recognition of prior learning needs to decide if it can in fact solve this problem itself, or in collaboration with other higher education institutions, or whether it needs to request action from the government. In Ireland, the universities are participating with the government in the development of a national lifelong learning policy in “a process whereby concepts of lifelong learning are increasingly having an impact on the higher education sector. The process has involved research, analysis, dialogue and innovation whereby the foundations are being laid for what is likely to be a significant change of direction for higher education.”²⁷

European education and learning systems at all levels need to present an identity based on high quality, positive diversity and transparency. This entails providing user-friendly information, flexible learning modules and paths, efficient entry, exit and re-entry procedures and quality assurance developed

with reference to the increasing internationalisation of some learning contexts. It is recommended that national governments in Europe do not adopt a protectionist stance towards transnational education, as this is likely to be ineffective and counterproductive in terms of the development of an internationally competitive European education. Governments and European higher education institutions should promote transnational education in the context of lifelong learning and increase the links and bridges between European academic and professional education and training. This is particularly important in the context of continuing professional development, where a global market exists.

If Europe does succeed in harnessing its learning potential and generating the ideas needed to contribute to global prosperity, diminished inequalities and global governance, other parts of the world may look to the old continent with new eyes.

ANNEX : LIFELONG LEARNING IN HIGHER EDUCATION PRACTICE

Introduction

During the consultation, the responses from the EUA members reveal a natural preoccupation with the daily reality of delivering lifelong learning and the questions that crop up.

Some institutions have an explicit lifelong learning policy accompanying a public commitment to lifelong learning; the majority probably do not, for the kind of reasons given at the beginning of the report, and sometimes for very practical reasons of the kind that their legislative framework does not as yet facilitate their adding a lifelong learning dimension to their activities. **There is a trend emerging among those that do have a policy to place at its centre the idea that lifelong learning is either “prioritised in the same way as ordinary education” or that it provides the broader framework within which all other education activities are then situated.**

There follow the main elements of a lifelong learning policy at the level of a higher education institution, however it is structured in the specific institutional context. Institutions have, of course, policies in related areas, for example, for using ICT in teaching and learning or for interacting with the local community. **Those that make lifelong learning part of their regular teaching and learning strategy face the challenge of moving lifelong learning from the margin to the centre and reorganising the institution accordingly.**

Even if the activity originates with individuals or in isolated departments, **once a policy is put in place, institutional leadership becomes essential, to maintain overall cohesion, ensure coordination between related policies, and to make and sometimes to shift priorities.** As the president of Frankfurt University puts it: “Strategies (for continuing education) are bound to evolve constantly, have to adapt to specific conditions, and are subject to constant revision. In reality, they are themselves part of continuing education.” The sentiment is broadened at the University of Manchester: “One possible way of improving the record of universities in lifelong learning

would be to look seriously at universities as “learning organisations”.

Lifelong learning appears to be a driver for change within higher education institutions. It is described varyingly as a catalyst, an “ice-breaker” in the move towards a more open higher education system,²⁸ a “positive disturbance...which can transform an emerging change perspective into...operational processes”.²⁹ Lifelong learning can cause internal and external walls to come tumbling down. The development and programming of activities encourages cooperation between departments (to access resources, form teams, etc.) and affects the frequency and intensity of the institution’s relationship with the outside world.³⁰

Designing the policy

A lifelong learning policy has to be based on understanding the new kinds of learners and working on how to attract them and keep their business throughout their lives. These learners can be returning students, employees, people who have left the labour market temporarily or permanently. Alumni networks are one way to develop ties. In the Netherlands, there has been discussion of “maintenance contracts” between higher education institutions and their graduates. But, while the institution keeps up the link with those already in, there is a challenge to bring in new learners.

Secondly, the institution must decide, on the basis of its specific experience, which lifelong learning activities it will offer and at which level. These can range from professional training to continuing education, cultural programmes or local development initiatives and respond to four types of demand:³¹

- adults wanting to obtain qualifications to advance in their career, change profession, or explore other interests
- companies and professional organisations wanting knowledge transfer, often linked to recent research
- public funders, at different levels, encouraging the institution to offer lifelong learning to different publics

- local and regional authorities, looking to the higher education institutions to be partners in the development of the region in a general way, of which providing lifelong learning and developing human resources is usually only a part of a wider demand for a contribution to cultural, social and economic development and problem-resolution or prevention too. For example, the institution can be requested to help deal with unemployment or help create the conditions for welcoming new enterprise to the area.

It is a challenge to the institution to manage these different demands and its response, as well as to maintain a good dialogue with these different stakeholders.

At this early stage, the institution must also consider how to finance its activities.

Organising the institution for lifelong learning

Before embarking on the activities, the institution has to find a way to balance a core identity with flexible learning structures (modular courses, dual learning trajectories). The advantage of organising learning into modules is that it facilitates accreditation. It is also a way to reduce “drop-out” – non-completed courses – and recognise part of study programmes. **If the institution decides that it wants to become a learning institution, it needs to develop its knowledge management capacity and think about how to train the “knowledge workers”.** It must decide whether ICT will support its lifelong learning and if it will, for example, invest in some kind of an “e-campus”.

The practical organisation of how to deliver lifelong learning is today a strategic question for a higher education institution, highlighted by many during this consultation. The key question is whether to organise the activities from the centre or the periphery of the institution and the answer at the moment differs across institutions. Hot on the heels of this question comes a second: what is the role of a continuing education or lifelong learning centre? This can span:

- promoting lifelong learning within and outside the institution, testing needs, marketing;
- assisting faculties and departments to develop programmes;

- coordinating activity across different units;
- managing financial and human resources;
- organising training for the personnel;
- advising clients;
- recognising learning.

During this consultation, the German Rectors’ Conference has proposed that a centre for continuing education be built into higher education institutions in Germany with the following key duties:

- professional advice and accompaniment of potential learners;
- organisation of resources;
- coordination of contracts with partners inside and outside the institution. Tricky questions, such as overheads, need to be tackled.

In France, a national decree defined the missions of a continuing education centre in a university. However, centres have evolved according to the characteristics of each institution. Feutrie has identified four types of centres:

- a central body, with the task of implementing policy, linked closely to the leadership of the university, sometimes through the appointment of a vice-president for continuing education;
- an autonomous body, somewhat external to the university, organising courses using the university teachers, but also contracting external teachers and trainers;
- a decentralised organisation, whereby the lifelong learning provision is the responsibility of each faculty or department; a central service coordinates the initiatives, but not necessarily according to any central policy;
- mixed structures, for example, a rather autonomous continuing education centre, as well as continuing education being organised quite independently in the different parts of the institution.

Institutions experiment with different models: the University of Bristol disbanded its Department for Continuing Education to move to offer its lifelong learning activities through the academic departments. Staff in the former Department for Continuing Education moved to their subject departments. This was a key move for this university determined to mainstream lifelong learning.

Peripheral structures such as a university foundation, a limited company, or a holding company can allow greater organisational responsiveness and flexibility, e.g. in hiring personnel, but they can lose effectiveness and credibility if they are seen to be too far removed from the university centre.

One of the most important criteria when deciding on the structure is to imagine how the people outside (individuals, companies, the city or region) understand its organisation.

Managing lifelong learning

The first point is how to provide information. For example, will it be from one or from several points within the institution? How will the interfaces for specific publics be organised? For instance, for individuals or for companies. The dialogue with the small and medium sized enterprise (SME) sector in particular is difficult at the beginning. Research has been done on the university-SME interface, for example, in the province of Emilia-Romagna in Italy.

Second is the question of welcome structures – to help the learner develop a learning project and trajectory and to accompany the learner along the learning path. **The institution can benefit greatly from participating in European or international specialised networks and projects, like EUCEN.**

Organising the teaching offer

The principles that will inform the organisation and development of the curriculum need to be decided. **Institutions must develop open-ended strategies, enabling them to preserve a long-term view of disciplinary developments and a shorter-term view of learners' different needs.** They can work through disciplinary networks, in cooperation with professional bodies and other partners, in order to identify core features of curricula, qualifications and professional profiles, thereby identifying core competencies in the discipline also. Course structures should incorporate the disciplinary and the inter- or multi-disciplinary angles. Remaining tasks are to devise efficient course production processes, identify staff and draw up methods for assessing the courses.

Doing research on lifelong learning

Topics currently being researched by EUA members, through their departments of Education, Continuing Education, Business and Economics, among others, cover new student profiles and learning motivations, innovative learning processes, teacher training, using ICT, learning at work, analysis of accrediting prior learning processes, cost-benefit analyses of the returns on qualifications for different kinds of students.

The institution's research on lifelong learning needs to reach out to other lifelong learning sectors.

Staff development

The institution invests in lifelong learning "professionals", training teachers and experts in new pedagogical approaches, the use of ICT and management skills. If the teacher organises rather than distributes knowledge, he or she must know of the different sources of learning available to the learner and know his or her discipline very well to be able to help the learner organise the knowledge, give it a meaning, link it to other learning, judge it and establish links for him or herself. All this work on redefining the role of the teacher has to be accompanied by reflection and action on several other points. How is the teacher's work organised, for example, and what can his or her career or professional development and learning path be? Administrative staff also need career development opportunities and incentives.

Recognising learning

The institution must decide what sort of learning it will recognise, according to which procedures (credit award, validation of prior learning), and see how its decisions fit into the wider national or European framework on recognising learning.

Partnership

With which partners is the institution going to work and for which purpose? For example, enterprises could from the outset be solicited for a discussion of the best interface for the university to have with them. They can also deliver learning jointly with the higher education institution (an example is the

Masters of Advanced Studies in System-on-Chip Design offered by the Technical University Graz, Austria Mikro Systeme, Infineon Technologies and Philips Semiconductors). Some such partnerships have evolved into autonomous training institutions, which can operate more flexibly than in the university environment. The higher education institutions could support the corporate universities of companies or network with them in specific areas.

The institutions can work in networks with other education institutions and partners, like local associations and NGOs, perhaps to organise regional and sector networks for cooperation in training. And they can network beyond their regions too. It is an Estonian (former Minister of Education and rector of the University of Tartu) who has expressed a vision of a “multilayered educational business shaped to the need of the local, regional and global communities, (labour) markets and individual preferences.”³² Sophisticated networks can develop joint products, combine marketing efforts and develop new services. But, the present competencies of most higher education networks are more limited. In the future, we can expect multiple networks for different purposes. Institutional and subject-based networks and associations can collaborate on research, exchange ideas on using ICT in teaching and learning, etc. Networks could play an important role in questions of recognising learning, by developing more mechanisms like benchmarking and cooperation in quality assessment at national level or beyond. The networks will increasingly include partners from a wide range of sectors: business and associations, for example.

Higher education institutions also have to consider greater participation of stakeholders like employers, recent graduates and students in their processes and sometimes in their governance, so as to enhance their ability to tackle the new competitive situation in higher education, which needs good feedback from outside on what works and what does not.

Selling or receiving funding for lifelong learning in other ways

This is the part of implementing lifelong learning with which higher education institutions often struggle. The solution is likely to be found partly through partnership activities and in an overall increase in investment for lifelong learning, as advocated by the Memorandum.

Conclusion

During this consultation, these are the most important success factors identified by higher education institutions serious about implementing lifelong learning:

- **There has to be an interaction between the different policy levels for lifelong learning – and, more often than not, there is not enough coordination.**
- **The work has to be placed in a long term perspective and attention given from the beginning to the sustainability of initiatives, including the resource base. Quality is the key.**
- **There has to be effective partnership.**

In this sense, the Memorandum identifies the correct “key to success”: “to build on a sense of shared responsibility for lifelong learning among all the key actors.”

MORE INVESTMENT IN HUMAN RESOURCES

Discussion Report of Workshop 2

The theme of investing in human resources for lifelong learning was explored broadly according to the themes highlighted in the background paper:

- investing money
- investing equitably
- investing in people by giving them time
- investing in learning facilitators.

More investment in human resources, and also better investment in human resources

Current investment is sometimes wasted and the group pointed out that different investors in lifelong learning – the learners, the learning providers (educational and training institutions,

non-governmental organisations), employers, governments and international organisations – should pay as much attention to better investment in human resources as to more investment.

An illustration of this issue is the number of people who do not complete their education and training, and receive no recognition for any learning partially completed. The workshop recommended more research into which groups of people do not finish education and training, in which type of learning situations, and for which reasons. In parallel, there should be increased investment in support for the learner throughout the learning experience, to help people finish courses and to promote recognition of more learning, thereby reducing wastage.

INVESTING MONEY

Who should invest in whom?

<i>Investors</i>	<i>“Investees”</i>
Individual	Learners
Employer	Providers
Public	Facilitators

The workshop suggested that Member States should increase investment in learners, in learning providers, and in learning facilitators. While individuals need more support, learning providers, for instance those investing in new methods of teaching or training, also need support to be able to serve the needs of differentiated learners. The role of the learning facilitators is treated later.

When investing in the learning provider, governments should ensure that there is clear information available to the learner and to any organisation sponsoring the learner on the quality of learning being offered.

When investing in the learner, Member States should introduce Individual Learning Accounts (ILAs) as a flexible framework within which to motivate and support learners. ILAs should not be too narrow in the kinds of learning they

finance and not too restrictive in the kinds of learners who may access them. Current experience with ILAs is in the formative phase in several countries; the European Union (EU) should finance a comparative study of experiences.

In addition, experiences with schemes to invest in the learner originating in the private sector could be compared with schemes introduced in the public sector. A study of European companies' efforts to raise levels of investment in human resources, inside and outside their companies, direct investment in employees or indirect social investment in communities, could be a first input to this comparative analysis, which should lead to future-oriented recommendations for investing better in lifelong learning.

A second investment mechanism used in several Member States is that of the learning town, city or region, where governments encourage local partnerships to invest in learners. A similar cross-country analysis of investment in human resources in these contexts could be useful. Local and regional regeneration programmes should include in their budget resources for lifelong learning. Companies and education and training

institutions should cooperate to develop jointly learning activities, as well as initiatives to promote human resource development in the community.

The social partners are negotiating a European framework for implementing lifelong learning, comprising common objectives to be implemented at national level. This should be presented to the European Council meeting in Barcelona next year. Agreements between the social partners to increase their investment through agreeing educational leave or workplace learning should be encouraged.

INVESTING IN PEOPLE EQUITABLY

Many people are excluded from learning, because they do not have the opportunity or the resources to participate, e.g., those not in work, or those in work but with little access to learning. Social exclusion is in fact experienced both inside and outside the labour market. Some people require special investment, at different stages in their lives: the unemployed, the young with special learning needs, the elderly, people with disabilities, with caring responsibilities, living in disadvantaged or remote areas, without basic qualifications, migrants, refugees or asylum seekers. Older workers attract less learning investment from their employers than younger workers.

A transnational study on the relationship between investment in learning and the development of human and social capital could look at the costs of non-participation in lifelong learning as well as the benefits. Further research into learning needs, the interests of those not participating and the reasons why they are not taking part in lifelong learning is necessary.

Some people (mostly the employed with a relatively high level of formal education) are able and motivated to invest in their own learning, but their initial investment needs to be valued and they need additional incentives or motivations to maintain a learning momentum. Motivations for citizens to invest more in their own learning could include:

At European level, there could be competitive benchmarking between Member States to compare public and private levels of investment across countries.

The workshop recommends that when Member States and the European Union set their priorities for funding lifelong learning, they should invest in the people furthest from learning opportunities, e.g., the socially disadvantaged, as well as in the objectives of learning least likely to be supported by other sectors, e.g., education for active citizenship.

- more and improved accreditation of different types of learning
- higher wages for employees
- awarding people more time.

For companies, incentives or rewards for investing in learning can take the form of tax relief, suggested especially for small and medium-sized enterprises.

When investing in lifelong learning in a Member State, there should be investment to provide a range of varied opportunities to encourage participation, as well as to provide support for different kinds of learners. ILAs may be a good mechanism to finance people who are motivated to learn but lack resources, but not to simply motivate people to learn.

In order not to widen the gap between the learning “rich” and “poor”, the relative as much as the absolute quality of a learning experience should be recognised: it is the value added to the prior knowledge and skills of an individual that can be examined during processes of accrediting and valuing learning, rather than the value *per se* of additional learning or qualifications.

Finally, the duration (and cost) of initial education and training might be reduced through accrediting more prior learning.

INVESTING IN PEOPLE BY GIVING THEM TIME

An alternative, or complementary, investment mechanism to financial support is to invest more in paid or unpaid learning leave. This leave should be flexible, well publicised and encouraged is necessary for those in the labour market.

Assistance for nursery schools and day care centres could help alleviate the situation of those with care responsibilities wishing to acquire or to update skills. New forms of cooperation should be encouraged between care centres and care-related services and training bodies and companies.

INVESTING IN LEARNING FACILITATORS

In addition to teachers and trainers, learning advisors and other people from a range of backgrounds are increasingly taking on pedagogic roles – professional and volunteer adult educators, community and youth workers, technology professionals, social and health workers, trade union activists or librarians. Older people can be expected to become more and more active in these kinds of roles. The importance of all “learning facilitators” – teachers and trainers, as well as the other profiles – should receive more recognition and incentives to develop their contribution to learning and to the construction of a sense of European citizenship.

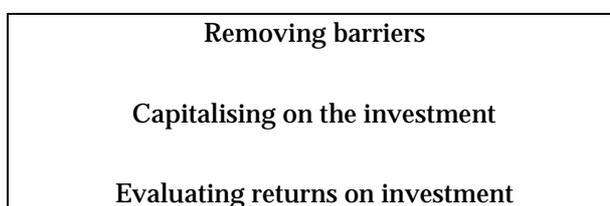
Action should be taken in all Member States and, where appropriate, at EU level to:

- review initial and in-service teaching training
- define new teaching profiles and skills
- review remuneration and career development possibilities
- promote transfer of experience across different learning contexts
- promote exchange of experience in innovative learning and training practices across countries
- develop ICT skills and understanding
- create a European reference centre to identify trainers’ needs and to support projects to improve their qualifications.

As well as having access to learning, citizens also require guidance and support to develop their learning plans, in the context of participating in a community and in society. The social as well as the personal benefits of learning should be stressed more. Investment in human resources should thus also comprise investing in better

information to people and in bringing learning closer to people in their community.

The investment process



The workshop agreed that barriers to learning should be removed as the corollary to any investment mechanism. Public policy in related areas needs to be coherent with the lifelong learning investment: for example, learning may be moved closer to learners, but people still need public transport or care services in order for them to be able to participate.

An investment can be monitored so that its potential can be fully realised at the end of the investment process and any changes brought to the mechanism before that point. This is where attention to the quality of the learning being provided and to the recognition of learning, as well as to the relevance of the investment, would be important.

The return on an investment into human resources for lifelong learning can be of three types: economic, social or cultural. There may be an economic benefit from improving the skills of older workers, especially as Europe faces labour shortages due to the retirement of much of the workforce; or, an investment might contribute to the construction of an equitable society or result in a better quality of life for some citizens.

CONCLUSION

The working group hopes that these reflections and recommendations can serve to help convince decision-makers to invest more and better in human resources for lifelong learning.

Today, ideas are wealth and, tomorrow, investment in people will equate sustainable economic and social progress. Such investment,

even when articulated at national, regional or local level, should be understood within a common European framework – the Commission Memorandum and subsequent texts should help make this point.

A successful lifelong strategy for Europe can be a competitive advantage in the global economy.

RECOMMENDATIONS

The different investors in lifelong learning should pay as much attention to better investment in human resources as to more investment.

Investing money

1. Member States should increase investment in learners, in learning providers, and in learning facilitators.
2. Member States should introduce Individual Learning Accounts (ILAs) as a flexible framework within which to motivate and support learners. ILAs should not be too narrow in the kinds of learning they finance and not too restrictive in the kinds of learners who may access them.
3. The European Union (EU) should finance a comparative study of experiences with ILAs to date.
4. Experiences with schemes to invest in the learner originating in the private sector could be compared with schemes introduced in the public sector. A study of European companies' efforts to raise levels of investment in human resources, inside and outside their companies, direct investment in employees or indirect social investment in communities, could be a first input to this comparative analysis, which should lead to future-oriented recommendations for investing better in lifelong learning.
5. A similar cross-country analysis of investment in human resources by investing in learning cities or regions could be useful. Local and regional regeneration programmes should include in their budget resources for lifelong learning. Companies and education and training institutions should cooperate to develop jointly learning activities, as well as initiatives to promote human resource development in the community.
6. Governments should ensure that there is clear information available to the learner and to any organisation sponsoring the learner on the quality of learning being offered.
7. Agreements between the social partners to increase their investment through agreeing educational leave or workplace learning should be encouraged.
8. At European level, there could be competitive benchmarking between Member States to compare public and private levels of investment across countries.
9. When Member States and the European Union set their priorities for funding lifelong learning, they should invest in the people furthest from learning opportunities, e.g., the socially disadvantaged, as well as in the objectives of learning least likely to be supported by other sectors, e.g., education for active citizenship.
10. Barriers to learning should be removed as the corollary to any investment mechanism. Public policy in related areas needs to be coherent with the lifelong learning investment

Investing equitably

11. A transnational study on the relationship between investment in learning and the development of human and social capital could look at the costs of non-participation in lifelong learning as well as the benefits. Further research into learning needs, the interests of those not participating and the reasons why they are not taking part in lifelong learning is necessary.
12. There should be more research into which groups of people do not finish education and training, in which type of learning situations, and for which reasons. In parallel, there should be increased investment in support for the learner throughout the learning experience, to help people finish courses and to promote recognition of more learning, thereby reducing wastage.
13. Motivations for citizens to invest more in their own learning could include:
 - more and improved accreditation of different types of learning
 - higher wages for employees
 - awarding people more time.
14. For companies, incentives or rewards for investing in learning can take the form of tax relief, suggested especially for small and medium-sized enterprises.
15. Member States should invest to provide a range of varied opportunities to encourage participation, as well as to provide support for different kinds of learners.
16. In order not to widen the gap between the learning “rich” and “poor”, the relative as much as the absolute quality of a learning experience should be recognised: it is the value added to the prior knowledge and skills of an individual that can be examined during processes of accrediting and valuing learning, rather than the value *per se* of additional learning or qualifications.

Investing time

17. Paid or unpaid learning leave should be flexible, well publicised and encouraged .

18. Assistance for nursery schools and day care centres could help alleviate the situation of those with care responsibilities wishing to acquire or to update skills. New forms of cooperation should be encouraged between care centres and care-related services and training bodies and companies.

Investing in learning facilitators

19. The importance of all “learning facilitators” – teachers and trainers, as well as the other profiles – should receive more recognition and incentives to develop their contribution to learning and to the construction of a sense of European citizenship.

20. Action should be taken in all Member States and, where appropriate, at EU level to:

- review initial and in-service teaching training
- define new teaching profiles and skills
- review remuneration and career development possibilities
- promote transfer of experience across different learning contexts
- promote exchange of experience in innovative learning and training practices across countries
- develop ICT skills and understanding
- create a European reference centre to identify trainers’ needs and to support projects to improve their qualifications.

21. As well as having access to learning, citizens require guidance and support to develop their learning plans, in the context of participating in a community and in society. The social as well as the personal benefits of learning should be stressed. Investment in human resources should thus also comprise investing in better information to people and in bringing learning closer to people in their community.

Investment, even when articulated at national, regional or local level, should be understood within a common European framework – the Commission Memorandum and subsequent texts should help make this point

Notes

- ¹ www.unige.ch/eua (see Activities): the Bologna Declaration and related reports and analysis.
- ² Barblan, A. (2001). *European Convergences in Institutional Quality*. Exeter: address to the Association of University Administrators.
- ³ Bricall, J. (2001). *Potential Convergence and the Cost of the Status Quo*. Salamanca: address to the Convention of Higher Education Institutions.
- ⁴ Feutrie, M. (2001). *La formation continue universitaire en France: situation et perspectives*.
- ⁵ EURYDICE. (2000). *Two Decades of Reform in Higher Education in Europe: 1980 Onwards*. Brussels: EURYDICE Studies.
- ⁶ Feutrie, M. (2001). *Op. cit.*
- ⁷ An interesting case is Spain, where lifelong learning is offered by higher education as an alternative to regular higher education. The sector has grown remarkably in the last twenty years, without national recognition of awards. Factors attributed to its growth are the quality of some of the new programmes, the slowness of the universities to adapt their regular courses to labour market changes, as well as the opportunity of extra income for academics. Mora, J-G. (2001). *Lifelong Learning Policies in Spanish Universities*. Poland is another example, where alternative courses are offered by higher education institutions on a fee-paying basis.
- ⁸ Markkula, M. (2001). *European Universities and Continuing Education*. (unpublished).
- ⁹ An emerging definition of transnational education is that of the Council of Europe/UNESCO Code of Good Practice in the Provision of Transnational Education: "activities in which the learners are located in a country different from the one where the awarding institution is based".
- ¹⁰ Adam, S. (2001). *Transnational Education Project Report and Recommendations, for the Confederation of EU Rectors' Conferences (which merged with CRE to form EUA)*.
- ¹¹ www.unige.ch/eua (see Activities): the Bologna Declaration and related reports and analysis.
- ¹² Barblan, A. (2001). *op. cit.*
- ¹³ The Council of Europe is working on a recommendation to governments on higher education policies in lifelong learning, detailing their responsibilities in a range of areas, from providing the legislative framework to establishing standards for quality assurance (<http://culture.coe.fr> – restricted access).
- ¹⁴ Bricall, J. (2001). *op. cit.*
- ¹⁵ Feutrie, M. (2001). *op. cit.*
- ¹⁶ *ibid.*
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- ¹⁹ adapted from Markkula, M. (2001). op. cit.
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