



Shanghai International Forum on Lifelong Learning

Making learning a reality throughout life for all: Progress, trends and systems of lifelong learning

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Summary Report of the General Rapporteur

Manzoor Ahmed

Director, Institute for Educational Development

BRAC University

Bangladesh

I. Introduction

Over 200 participants from 35 countries attended the Shanghai International Forum on Lifelong Learning from from 19 to 21 May 2010. The forum, which took place during the World Expo 2010 in Shanghai, PRC, was hosted by the Shanghai Municipal People's Government, the Chinese Society of Educational Development Strategy (CSEDS), the National Commission for UNESCO of China, and UNESCO.

The Shanghai Forum was the first major international follow-up event in the wake of the CONFINTEA VI conference held in 2009 and at which the *Belém Framework for Action* was adopted. Its aim was to strengthen the momentum for lifelong learning created by CONFINTEA VI, and to help translate the discourse on lifelong learning into practical action to build lifelong learning systems.

The Shanghai World Expo is unique in devoting itself to presenting a vision for a better society and a better life in a world characterised by rapid urbanisation, rather than showcasing products and technologies, as expos usually do. It is entirely fitting that the World Expo turns the spotlight on sharing the vision and practical actions for creating learning societies – because such societies are key to sustainable development, and support harmony, justice and life with dignity for all human beings.

The forum brought together a truly remarkable group of people from across the world – Africa, Asia and the Pacific, Latin America, Europe and North America – all of whom have dedicated their lives to developing concepts and practices of learning and education, and to studying and critiquing these. They offered their thoughts on the way things have turned out, where we are today and where we should or could be. And they did, as we stand here after CONFINTEA VI, ponder the prospects of achieving or not achieving the 2015 Millennium Development Goals and EFA goals, and considering the still bigger challenges and possibilities facing humankind at the beginning of the 21st century.

Experience, achievements and concerns were shared in the plenary and breakaway sessions by practitioners, policy-makers, advocates and academics from many countries. It is impossible to summarise and encapsulate the richness and nuances of the

deliberations. The best that we can do is to capture strands of the main arguments and positions that emerged during the forum. We attempt to present the various sides of the argument in each case, and outline a number of propositions regarding strategic actions that merit attention.

II. China illustrates global progress

Let us first note and celebrate the progress that was made and reported upon in this forum. To illustrate the diversity and scope of what has been done in many countries, we shall briefly outline the learning opportunities beyond the formal system which have been introduced in China as elements of lifelong learning. Benin, Indonesia, India, Japan, Korea, South Africa, Thailand and USA, among others, also shared their own history and the predominantly non-linear progress they had made towards building components of lifelong learning. The experiences of these countries as well as of China bring to the fore a number of conceptual, strategic and operational issues which were the subject of intense discussion in the forum.

In China, the scope of lifelong learning is seen to be at least three times that of the formal school population: there are a billion candidates for lifelong learning, including 790 million workers who need to renew their knowledge and skills; 120 million people migrating from rural areas to cities who need to adapt to new work and living environments; and 144 million elderly who want to be active citizens and pursue a meaningful and enriched life of leisure (Hao, 2010).

Hao Keming, President of the Chinese Society for Educational Development Strategy, informed us of various new modes of continuing education that have been created. These have developed fast through partnerships between the government, schools, communities, industries, enterprises and other organisations.

A major expansion of opportunities in China has occurred to enable rural people who have no formal education beyond the primary level to acquire relevant knowledge and skills. Continuing education is offered at adult secondary vocational schools and adult higher education institutes, which grant diplomas. There is also provision for non-

diploma-based continuing education, such as the secondary vocational schools for farmers, which have provided training to over 1.1 billion people since the mid-1980s. Moreover, workplace training is offered to around 90 million participants every year. There is continuing education for administrative cadres and other professionals in governments, industries and non-governmental organisations involving women, youth and workers.

China has built a distance education and service platform based on satellite, television networks and the internet. The number of registered distance learning students in regular higher education institutions has reached 1.1 million.

A national pilot learning communities project has been initiated in 114 locations, offering various forms of continuing education that are coordinated effectively in order to ensure that provision is of a consistently high quality. Provincial governments also have set up over 400 provincial learning communities.

A new and significant initiative will expand and reform school education, including curriculum and pedagogical practices, guided by the principle of lifelong learning. This will make school education more open and flexible to meet the diversified needs of learners. Vocational schools will be encouraged to provide both diploma education and short-term professional training for all citizens. To enhance the social service functions of higher education institutions, these will be required to broaden their offerings in continuing education and training. Incorporating the principle of lifelong learning into the total education system is considered to be one of the most important goals of the 21st century. In this context, consideration is currently being given to the establishment of a guiding and coordinating body at the national level, with the participation of industries and other stakeholders.

Other key enabling measures for the further development and promotion of lifelong learning which are either underway or have been identified as necessary are:

- an overall legislative framework for lifelong learning, which will clarify the rights and responsibilities of the government, organisations and individuals;
- a national lifelong learning support and service system that covers both urban and rural areas through the application of ICT, including satellite and broadcasting networks and the internet;
- improved learning outcomes assessment and accreditation, and credit transfer systems;
- research into ways of developing personal lifelong learning credit accumulation accounts and integrating these step by step into the continuing education system;
- a national qualifications system in which knowledge, skills and competences are equally weighted, and diploma and professional qualifications are mutually transferable;
- a learning budget assurance and cost-sharing system which clarifies the responsibilities of the government, employers and individuals, thereby ensuring that more support is given to disadvantaged and vulnerable groups; and
- research into incentive mechanisms to increase spending in workplace learning by industries, organisations and civil departments (Hao, 2010).

With more than 6,000 learning stations and other basic and tertiary level distance education, face-to-face and combined facilities outside the formal education and training system, the city of Shanghai itself stands as an example of the emerging architecture of lifelong learning. These are the building blocks for a “learning city” that will in time form the learning society that Shanghai has pledged to become (Li, 2010).

III. Re-affirming the concept

The *Belem Framework for Action* affirmed that “Lifelong learning ‘from cradle to grave’ is a philosophy, a conceptual framework and an organising principle of all forms of education, based on inclusive, emancipatory, humanistic and democratic values” (UNESCO, 2009).

Lifelong learning is, of course, as old as human life itself. As Ye Lan put it, “Lifelong learning was there before education was invented” (Ye, 2010). Or, in the words of Roger Boshier, people in traditional societies had to learn to stay alive; hence, learning was survival (Boshier, 2010). The idea of lifelong learning only became obscured more recently, as social functions became increasingly specialised and institutionalised, leading to the ascendancy of formal education in childhood and early adulthood. Abdel Baba-Moussa from Benin reminded us that it was Philip Coombs who introduced the conceptual categories of formal, non-formal and informal education in the 1970s. Coombs also pointed out that the vast majority of human learning was of the informal and non-formal kind, and continued on a lifelong basis (Baba-Moussa, 2010; Coombs and Ahmed, 1974).

Several speakers, including Adama Ouane and Heribert Hinzen, referred to the reports of the UNESCO Commissions of 1972 and 1996, headed by Edgar Faure and Jacques Delors respectively (Ouane, 2010; Hinzen, 2010). As the Faure report stated, “If learning involves all of one’s life, in the sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources, then we must go even further than the necessary overhaul of ‘educational systems’ until we reach the stage of a learning society” (Faure *et al.*, *Learning To Be*, 1972: xxxiii). Meanwhile, the four pillars of learning invoked by Delors – learning to be, learning to know, learning to do, learning to live together – elaborate the paradigm of the intricate interaction of learning, life and society (Delors *et al.*, 1996).

Roberto Carneiro eloquently described the new educational landscape as one that moves from mostly “taught learning” to a combination of taught learning, a lot of self-learning, strong community learning, and increased assisted and networked learning – coupled with an unbundling of education services that allows for much-enhanced opportunities in relevant learning for all with far greater flexibility of time and place. Learning to learn is seen as the foundational skill, and includes building self-image and self-esteem, strengthening critical thinking skills and motivation, and then developing strategies for and participating in learning. Kasama Varavarn drew on the experience of Thailand to

further underscore the importance of building both the capacity and motivation for self-directed learning (Carneiro, 2010; Varavarn, 2010).

Rosa Maria Torres affirmed and complemented these ideas by equating learning with living, asserting that life is the ultimate curriculum. She and others emphasised learning as a collective and social process which requires the creation of learning families, communities and societies.

Torres also drew attention to what lifelong learning was not, stating that it was:

- not lifelong *education* (a mechanistic and controlled process),
- not limited to adults;
- not an economic strategy to produce human resources (viewing humans as production machines);
- not just individual learning, but a collective and social process; and
- not in conflict with the right to education (but instead enlarging it as the right to learning) (Torres, 2010).

Kusumiadi and Martono from Indonesia and Shirley Walters from South Africa, among others, stressed the need to balance the vertical integration of lifelong learning with the horizontal integration of life-wide learning and the learning opportunities, objectives, contents and scope it entails. One aspect of life-wide learning is to become active and effective citizens – for personal fulfilment and as a social duty – and this is a vital concern in both developing and industrial societies (Kusumiadi and Hartono, 2010; Walters, 2010). Another expanded vision of learning is illustrated by Singapore’s four-fold objective of building human capital, social capital, emotional capital and imagination capital, as described by Professor Carneiro (Carneiro, 2010).

The concepts reflected in the formulations presented here may be regarded as abstract and, arguably, idealised, and thus would invariably face many obstacles in the course of attempts to translate them into reality.

IV. Some contested issues

Probing into the dialectics of or tensions inherent in a number of the positions taken during discussions may help to clarify the obstacles and constraints encountered and suggest ways of finding and applying pragmatic and workable solutions. Some of these are noted briefly here.

- *The tension between approaches that are open, flexible and participatory enough to respond to individual and community needs, on the one hand, and state and public sector responsibility for lifelong learning, on the other.* In the context of the market economy and the commodification of public goods, this issue has become a legitimate concern. It appears to be more a matter of the political and ideological positions taken by the protagonists rather than any inherent contradiction between flexibility/choice and public/state responsibility in terms of creating regulatory frameworks, providing or helping to mobilise funds, establishing partnerships and collaborations with various stakeholders, and the state serving as the major service provider or the provider of last resort.

- *Is lifelong learning fundamentally a question of providing opportunities for people to acquire job-related skills and adapt to new job markets, as the EU emphasis would appear to indicate?* While the importance of acquiring employment-related skills and improving one's economic well-being cannot be under-estimated, equating lifelong learning with human resource development is clearly a highly restrictive view of lifelong learning that does not accurately represent the EU position, as Hinzen points out (Hinzen, 2010). This, as Boshier and others have noted, is a politico-ideological position that unnecessarily places the neo-liberal and the "social democratic" approaches in opposition to each other.

- *The pedagogical approach – what roles do teachers and learners play? Should the traditional pedagogical roles of teachers and learners be reversed?* This question fails to appreciate the ways in which teaching-learning practices, concepts and norms have changed. The learner-centred approach to teaching-learning, the idea of the self-motivated and self-regulated learner, the teacher's role as a facilitator rather than the fount of knowledge, the concept of teachers and learners being engaged in a joint

exploration of discovery, are particularly appropriate and consistent with the philosophy and rationale of lifelong learning.

- *Is a reformist approach to educational change all that is needed to ensure that the lifelong learning approach is integrated into the education system, or is more radical change required at the system level?* A case in point is the use of metropolitan languages such as French as the medium of instruction in formal education, which contradicts the spirit of lifelong learning. Educational reform or change is complex and difficult and the rhetoric or intent of radical change does not necessarily produce the required results. The course of action and strategy has to be context-specific and the agenda determined in as consensual a way as possible by major stakeholders. The interest of the vulnerable and the disadvantaged, a pragmatic timeframe for change and the trade-offs have to be systematically assessed.

- *Is lifelong learning essentially a question of adult education, literacy, and non-formal education?* An affirmative answer would be contrary to the concept and rationale of lifelong learning. Nor is this logical, since formal learning obviously occurs within a person's life-cycle. Synergy is the key word in lifelong learning. Transformation of the educational system has to embrace the entire system to realise fully the power and potential of lifelong learning. At the same time, the reality is that the formal system is well developed structurally and institutionally; therefore, the less-developed parts of the total system have to be given greater attention. It is a question of balance and time-phasing of efforts. Informal learning, although by definition not planned and organised, also has to be brought into the equation creatively and with imagination.

V. Identified needs and the way forward

On a number of important questions where the debate is not as dialectical or dichotomous, the need for definitive actions and strategies has emerged in the course of the discussion, which deserves priority attention. This, not an exhaustive list, includes:

- *The need to develop and articulate policies.* A critical issue is the scope of the policy – how broad should it be – embracing all aspects of education and

learning or confined to specific areas, such as adult learning, vocational skills or a focus on literacy? The arguments presented throughout the forum support a broader scope which would place various components or elements of lifelong learning within the larger context. But this would depend on how much change and development can be realistically undertaken within a given time-frame. A possible compromise is to develop an overall policy framework and within it, consider more detailed elaboration of policy for specific aspects which are given priority in terms of phasing-in change.

- *The legal framework.* Related to policy development is the formulation of the legal framework to give effect to the policy. The legal provisions and associated rules, regulations and procedures derived from the adopted laws help develop a systemic approach and strengthen the governance and management of lifelong learning activities. We heard of the legal provisions in effect or in development in many countries.

- *The Community Learning Centre network as the vehicle for promoting lifelong learning.* Multi-purpose community learning centres with community ownership, such as the *Konnikan* in Japan, exist in many countries. These are effective when they become the base for offering relevant training and knowledge dissemination and for link-up with ancillary support. These, brought together into national or regional networks for technical support, can be a vehicle for education and learning opportunities which have an impact on poverty reduction and improving quality of life. They, therefore, are the essential building blocks for lifelong learning in the learning society.

- *An equivalency framework.* As described in the case of South Africa, a national qualifications framework helps to deal with the issues of access, mobility, quality and programme development in lifelong learning activities in an integrated way. Establishing equivalency is obviously important in situations where credentials and certification are important. But it can serve as a quality enhancement measure in all kinds of programmes (Walters, 2010).

This mechanism can function effectively when there is adequate arrangement for coordination, communication and cooperation among key stakeholders. Contestations and debates are to be expected, but these can be resolved if there is a shared view about the core objectives and research-based evidence is relied upon.

- *Making lifelong learning objectives and content relevant to critical concerns of society.* Lifelong learning derives its rationale from its links and direct relevance to identified needs and problems of individual learners and the collective priorities of societies. This theoretical position is not automatically translated into reality unless this is given systematic attention in conceptualisation and design of strategies and programmes. A case in point is the urgent task of establishing the links and relevance of lifelong learning with the goal of enhancing people's capabilities, knowledge, understanding and skills for sustainable development. As Walters reminded us, one of the messages from CONFINTEA VI was, "The planet will not survive unless it becomes a learning planet" (Walters, 2010).

- *Making full use of the ICT potential.* Advances in ICT have opened new frontiers in delivering content in creative ways and reaching new groups of learners. The potential, however, is very far from being realised. ICT in adult and lifelong learning, given their broad scope and mandate, can help bridge the prevailing digital divide. As John Daniel put it, ICT can help sever the "insidious link between quality and exclusivity" in education and promote wider access and higher quality with lower cost, "all at the same time" (Daniel, 2010).

- *Major increase in public resources.* The share of adult learning components of lifelong learning is typically less than one per cent of the government education budget in developing countries, and is a microscopic fraction of GDP. With an expected increase in the total government budget for education in most countries in the coming years, it is reasonable to set a target to raise

the share of adult learning and education/lifelong learning to at least three to five per cent of the education budget in the medium term, increasing further in the longer term. This increase need not be an undue burden and is certainly consistent with the proclaimed role of adult learning and education/lifelong learning. A rationale for balanced support for different components of lifelong learning, including formal education, should be developed. The enhancement of resources from other sources – including the private sector, communities and external assistance –should also be pursued vigorously.

To conclude, a wide spectrum of learning objectives and groups of learners has to be served by formal, non-formal and continuing education programmes and through an enriched informal learning environment, all of which are components of lifelong learning. The logical corollary to the idea of lifelong learning is that all citizens benefit from and contribute to learning and to society, and communities become learning-friendly and help create a learning environment. Lifelong learning is not an option any longer; and it is not just a necessity; it is an obligation that has to be met collectively by all.

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