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Explaining European Union Lifelong Learning Policy: Globalisation and Competitiveness or Path Dependency and Citizenship?

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Abstract: The European Union's founding treaties and institutions determine that 'markets' frame its approach to lifelong learning, yet other more humanistic discourses, albeit secondary, have developed. This paper explores how and why.

When lifelong *education* held centre-stage in the 1970s, UNESCO was key among the international organisations which sponsored it; in lifelong *learning* since the mid-1990s, UNESCO's role has been more modest. In contrast, the European Union has emerged as a major player. Contrasting the economism of lifelong learning with the more humanistic perspectives of the Faure report, Boshier (1998, p. 4) described lifelong learning as "human resource development in drag". His view is widely shared (if typically in less colourful phraseology), especially within the adult education community. The EU's major role has not, however, been matched by analysis of its lifelong learning policies. In general, the end-point of contributions has been to establish that EU policies share the OECD's economic orientation: although formally social cohesion is an aim, in practice concerns about inclusion, cohesion and citizenship are either at a discount or framed in terms of employability (Field 2006).

This paper explores how and why EU lifelong learning policies came to adopt this economic tone. Generally speaking, this has been explained by globalisation. Brine (2006) and Field (2006), for instance, have located the EU lifelong learning policy in the White Paper on *Growth, Competitiveness, Employment* (CEC 1993), rather than in the education White Paper of about a year later, *Teaching and Learning: Towards a Learning Society* (CEC 1995). This paper argues that such explanations overlook (and/or underplay the significance of) key features of the development of the EU's position.

In particular, the paper argues that the EU's orientation toward competitiveness in lifelong learning does not stem solely from late-modern concerns with globalisation. Rather, economic competition has framed EU policy in all sectors from the formation of the European Economic Community as a Common Market in the 1950s. In a sense, what matters about EU lifelong learning policy is not its fundamental location in the discourse of competitiveness: given the nature of the founding treaties and fundamental institutions of the EEC, path dependency made this inevitable, or at least overwhelmingly probable. Rather, the significance of EU lifelong learning policies lies in the space allowed for the development and framing of other discourses, albeit *prima facie* secondary ones. Research should therefore explore the nature of this space, and to what extent it offers potential for the further development of lifelong learning of a broader, more humanistic, nature. The case developed here is that the economic framework and rhetoric of much EU lifelong learning policy has tended to mask important, if subsidiary, themes of equity, citizenship and (particularly European) identity. The argument is developed through an analysis of European policy documents since the 1950s.

In part, this paper can therefore be regarded as an exploration, with specific reference to lifelong learning, of Martin Lawn's argument that, in the EU, a 'new space for education' exists within the dominant, market, discourse (Lawn 2002, p. 20). He describes this space as 'fluid, heterogeneous and polymorphic', existing 'within the daily work of teachers and policy-makers,

within shared regulations and funded projects, within curriculum networks and pupil assignments, and in city collaborations and university pressure groups'. He argues this new space represents a significantly new approach to policy-making, involving the creation of a 'new cultural space' in which 'new European meanings in education are constructed' (p. 5) – though not that it necessarily leads to radically different agendas. A question at issue, therefore, is what difference, in practice, this European space makes.

From Rome to Maastricht: Marginal Development

Marginal to the original design of the European Community, education was 'taboo' in debates at European level until the early 1970s – with very minor exceptions such as establishing the European University Institute (Blitz 2003, p. 4). In 1971 Education Ministers agreed an uncontroversial (non-binding) resolution 'to provide the population as a whole with the opportunities for general education, vocational training and life-long learning' (Blitz 2003, 5), and in 1974 – influenced by the first enlargement – they agreed to encourage 'co-operation' in various priority sectors, while preserving 'the originality of educational traditions and policies in each country' (CEC 1979, 2).

These two themes (co-operation and diversity) enabled the Commission to move forward on education policy while minimising conflict with member states. 'Declaratory resolutions' in the 1970s involved 'minimal cost to the member states', but allowed incremental development, led chiefly by EU functionaries (Blitz 2003). What stands out in this phase is the tendency creatively to conflate education as a universal value with the economic requirements of the single market. In the 1970s, however, neither Commission nor Community emphasised *lifelong* learning, perhaps due to the distance between the Common Market's economic concerns and UNESCO's humanistic framing of lifelong education.

The 1980s saw further incremental extension in the Community's educational profile, supported by European Court of Justice decisions and the establishment of a Directorate General within the Commission. However, the focus remained limited – chiefly to supporting improved school curricula and quality, with a marked European content. Concern with *lifelong* learning (in the post-compulsory sense) remained limited: in a mid-1980s statement on 'The European Community and Education' it was confined to school-to-work transitions and 'adult anti-illiteracy campaigns'; even education for migrant workers now to support education for *children* of migrants (CEC 1985). The low profile of lifelong concerns in Community education policy in the 1980s mirrored the attitudes of most international organisations: from the mid-1970s to the early 1990s, international and inter-governmental bodies 'said relatively little' about lifelong learning; and the notion of lifelong education as formulated in the early 1970s (UNESCO 1972) 'almost disappeared' from policy agendas (Dehmel 2006, p. 51).

Maastricht: A New Competence

Only with the Treaty of Maastricht (1992) did the European Union (as it now became) achieve an unambiguous element of competence in education: to make 'a contribution to education and training of quality and to the flowering of the cultures of the Member States'. This general aim remained circumscribed by the principle of subsidiarity; and a number of specific aims of Community action were set out, relating chiefly to initial education. These included developing a 'European dimension' in education, particularly by strengthening language teaching; encouraging the mobility of students and teachers and recognition of qualifications; encouraging youth exchanges and 'exchanges of socio-educational instructors'; and encouraging distance education. (Article G). Only to a limited extent did the Treaty explicitly address lifelong (i.e., post-initial) learning – and again, in relation to economic priorities. The Community was to

‘implement a vocational training policy’ which should aim to ‘facilitate adaptation to industrial changes, in particular through vocational training and retraining; improve initial and continuing vocational training in order to facilitate vocational integration and reintegration into the labour market; facilitate access to vocational training and encourage mobility of instructors and trainees and particularly young people; stimulate cooperation on training between educational or training establishments and firms ...’ (Article G)

The (new) general authority for the EU (and its Commission) to contribute to ‘education and training of quality’ provided some basis for policy development in other areas. Inevitably, however, this general authority has in practice been circumscribed by the general presumption in favour of subsidiarity. Following Maastricht, therefore, those in the Commission who sought to develop lifelong learning policy were both newly empowered and constrained. Member States could no longer object on principle to Commission activity in education; a stronger ‘European’ dimension was explicitly to the fore; initial education or schooling was clearly at the forefront of the Treaty-makers’ minds – and insofar as they thought of lifelong learning at all, they saw the priorities in terms of vocational training.

Lifelong learning

When lifelong learning re-emerged internationally in the 1990s, the emphasis was firmly on supporting economic performance, whether individual or societal (Boshier 1998; Field 2006). Within the EU this provided new space for the expansion of non-economically-oriented policies, for two main reasons. First, the new agenda was closer to mainstream EU concerns. Second, the Community’s ‘competence’ in education had always been restricted; and subsidiarity meant educational activity was chiefly a matter for member states. Any EU attempt to intervene in national educational affairs had to be closely related to the core EU aims: educational measures had to be justifiable as furthering the common *market*.

Given this legal framework, when lifelong learning re-emerged in international policy debates in the early 1990s, the Directorate General for Education developed policy chiefly in support of economic needs. *Growth, Competitiveness, Employment* (CEC 1994) – not an education White Paper, but the more important for that – emphasised globalisation, ICT, and competition from Asia and the USA. However, a key theme was the unemployment which would arise if these challenges were not met. For working life, at least, lifelong learning and ‘continuing training’ were essential. Lifelong learning was now ‘foregrounded’ in a suite of policies entirely consistent with central EU aims and educational objectives specified at Maastricht. The education White Paper, *Teaching and Learning: Towards a Learning Society* (1995) developed a rationale for lifelong learning within this framework; it served a ‘crucial role in establishing lifelong learning as a guiding strategy in EU policies’ (Dehmel 2006, p. 53).

From the mid-1990s, the ‘primarily utilitarian, economic objectives’ which brought lifelong learning to centre-stage in international policy debates began to be complemented by ‘more integrated policies’ involving ‘social and cultural objectives’ (Dehmel 2006, p. 52). Within the EU, and within the framework offered by the White Paper, a range of programmes (Socrates, Leonardo da Vinci, etc.) were launched, in which lifelong learning was at least a strong theme; 1996 was designated European Year of Lifelong Learning; and so forth. The trans-European dimensions of these programmes (e.g., encouraging exchanges of teachers and students across EU member states) were also contributions to building a European identity, and to the construction of European citizenship.

By the turn of the century, therefore, lifelong learning was a distinctive feature of EU education policy. Of course, international organisations and some member states had moved in a

similar direction. But for the EU lifelong learning had become both an organising theme linking a range of policies in education with other areas (notably economic policy and social exclusion), and the home for several programmes designed to strengthen Europeans' identification with the EU.

The Lisbon Strategy

A new landscape of EU policy was set by the Lisbon European Council (March 2000). The Lisbon strategy rested on the 'knowledge economy' (and related notions) which were much in vogue during the later 1990s, not least in EU circles (e.g., Lundvall & Borrás 1997), bound up with discourses of modernisation and change. The EU set itself 'a new strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world ... with more and better jobs and greater social cohesion' (CEC 2000). Elaborated in some detail, this included 'modernising' the European social model and building an 'active welfare state'.

A central feature was to encourage education and training systems to adapt to 'the demands of the knowledge society and to the need for an improved level and quality of employment'. Adults (or more accurately, certain groups of adults) were given a central position: specifically, 'unemployed adults' and employed people 'at risk of seeing their skills overtaken by rapid change' (CEC 2000). Various activities were also specified, including a European framework for 'new basic skills to be provided through lifelong learning' (IT skills, foreign languages, technological culture, entrepreneurship and social skills), more elaborated mechanisms for 'mobility of students, teachers and training and research staff' through Community programmes (Socrates, Leonardo, Youth), and greater mutual recognition of qualifications (CEC 2000). All these were in line with the specifications of the Maastricht Treaty.

The importance of Lisbon for lifelong learning also stems from the 'Open Method of Co-ordination'. This had evolved during the 1990s but was now given a formal role in policy development (Hantrais 2007). Two elements of the OMC have proved key for lifelong learning. Subsidiarity was re-stated; but more important, Lisbon emphasised agreed timetables and goals, indicators and benchmarks, and 'monitoring, evaluation and peer review' (CEC 2000). The monitoring was both of the Commission's activities and of the EU's progress: this implied – despite the emphasis on subsidiarity – increasing intervention in member states' policy and performance. European guidelines were to be 'translated' into national policies 'by setting specific targets and adopting measures', and by ensuring that monitoring, evaluation and peer review were 'organised as mutual learning processes' (CEC 2000).

Lisbon heralded a marked increase in the volume, detail and specificity of policy-formulation in lifelong learning. It did not, of course, attempt directly to *organise* lifelong learning or education *within* member states. It is hard to isolate the relative impact of factors which influence national governments, but *prima facie*, EU policy recommendation, monitoring and evaluation of progress against benchmarks using a developing range of indicators seem likely to have had a significant impact in shaping national policies.

Efficiency or Equity?

One of the criticisms to be directed at the notion of a 'new European space' is its emphasis on *process* rather than *outcomes*: on how the space works rather than what emerges from it. How far has this 'space' actually generated distinct outcomes? The evidence above shows that in relation to lifelong learning, central features of European policies have been in step with dominant international policy trends since the early 1990s. In the EU's case, however, this 'economism' can be traced back to the EU's long-standing orientation toward a stronger market.

In other words, the fact that EU policy now shows many similarities with international policy appears to reflect not so much the recent impact of globalisation, as path-dependency from the EU's fundamental institutions and treaties. Despite this dominant 'market' orientation, however, concerns with social inclusion, citizenship, and social cohesion are evident – the Directorate General's role seems significant here. Such concerns have often been articulated in language compatible with the market, reflecting the parameters of EU competence.

By 2005 it was apparent that progress toward the Lisbon goals in education and training (as in other areas) was lagging. Meeting the objectives (or more precisely, the benchmarks set against the objectives) remained 'a serious challenge'. Thus in relation to 'increasing participation in lifelong learning ... the EU has made little progress up to 2003, the last year for which data is available' (CEC 2005, 13). In a recent paper, Robertson (2007) has argued that, in response to the sense that the Lisbon strategy was failing, and the EU falling behind, a new 'crisis discourse', and 'a set of globally-oriented "education" policies and programmes' emerged from 2005. This, she suggests, 'undermines the idea of a European civility and stains the iconic status of the European Social Model ...'. Can we see such a shift (from citizenship and inclusion to globalisation and markets) in lifelong learning discourse?

Efficiency and Equity in European Education and Training Systems (CEC 2006a) is only marginally concerned with adult learning, but argues that in vocational education and training the less well-qualified 'are least likely to participate in further learning and so to improve their employment prospects' (p. 9). Courses for 'the unemployed and those who have not succeeded in the compulsory education system' are 'important' in 'equity terms'.

Adult Learning: It is never too late to learn (CEC 2006b) also addresses an increasingly diverse range of member states – to meet Lisbon benchmarks, four million additional adults would have to participate in lifelong learning. Adult learning is posed as relevant to competitiveness, demographic change (ageing and migration), and social inclusion. Barriers to participation must be lowered; member states should invest in improved quality of provision, including for older people and migrants; 'validation and recognition of non-formal and informal learning' (within the European Qualifications Framework) and data for indicators and benchmarks should be improved.

Key Competences for Lifelong Learning: European Reference Framework (CEC 2007) is a technical document, in the Lisbon benchmarking spirit, designed to 'provide a European-level reference tool for policy-makers, education providers, employers, and learners themselves to facilitate national- and European-level efforts towards commonly agreed objectives' (p. 3). It specifies knowledge, skills and attitudes across eight areas: communication in mother tongue and foreign languages, mathematical and digital competence, learning to learn and sense of initiative and entrepreneurship, social and civic competences and cultural awareness and expression. Some of these could certainly be 'mapped' against the need to compete in the global market; for others, the case would be more difficult to make.

In none of these documents is language of 'knowledge economy', or 'knowledge society', prominent. In *Efficiency and Equity* there are two references to the latter, and one to 'knowledge based economy and society'. In *Adult Learning*, neither term appears at all. *Key Competences* contains just two references to 'knowledge society', one (in the Foreword) to 'knowledge-based society', and none to knowledge economy; the word 'globalisation' occurs just twice. There are no references to the Lisbon objectives in *Key Competences*, while in the others they are fewer and less prominent than in earlier documents.

To summarise: EU education policy has always been principally vocational. This reflects the founding treaties, and stems more from ‘path dependency’ than ‘globalisation’. Since the early 1990s, EU lifelong learning policy has developed in parallel with a concern to establish a European identity. The ‘economic competitiveness’ orientation of international lifelong learning has provided space for the EU to develop lifelong learning policies and practices which give some emphasis to citizenship and social cohesion. Inevitably vocational concerns predominate. The EU’s achievement – albeit qualified – lies in ensuring a place for wider social concerns in inauspicious times.

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The remainder of references are available upon request.