

“LEARNING THROUGH LIFE: A STUDY OF LEARNERS AT OUHK”

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## Chapter One: Introduction

### 1.1 Conception of the study

When I began the study, I was a full-time nurse educator. I taught student nurses at a hospital-based nursing school under the Hospital Authority. I also had a part-time job with the Open University of Hong Kong (OUHK) from 1998 to 2008, teaching subjects in the Bachelor of Nursing (NU305) program, Higher Nursing diploma courses (NU112C), and Master's in Education (E804/E814) program. Currently, I am a nursing officer in an intensive care unit (ICU), responsible for training and quality assurance.

As a former nurse educator in a hospital-based nursing school, a trainer, and a part-time tutor at OUHK, I was interested in learning more about the trends and changes related to the teaching and learning of adult learners. I observed that in many state policies and academic discussions, “lifelong learning” has replaced the term “adult education.” Indeed, interest in the idea of lifelong learning has recently grown (Smith 2002). Nonetheless, I did not clearly understand the idea of lifelong learning and how it is different from adult education. There is also no universal definition of lifelong learning; rather, it is interpreted by various stakeholders in different ways (Kumar 2004). This aroused my interest in exploring the nature of lifelong learning,

its implications to me as a tutor and a trainer, and the process by which empirical and qualitative data on lifelong learning can be collected.

When I was working at OUHK, I met people who called themselves lifelong learners. I observed that people worked hard to continue their studies—to pursue qualifications, to keep upgrading, and to stay competitive. For example, hospital-diploma registered nurses would take nursing degrees to stay at par with university graduate nurses. Nurses would study diploma courses to become registered nurses, school teachers would take master’s degrees to be promoted, and professional trainers would study education to enhance their professional qualifications. As such, I wondered about what these lifelong learners had in common, such as their motives behind learning, their lifelong learning experiences, and the ways by which they sustain lifelong learning.

## 1.2 Hong Kong Government’s Policy of Lifelong Learning

My part-time teaching experience and the government policy of Hong Kong urged me to catch up with the “lifelong learning.” With the goal of developing Hong Kong into a knowledge-based society, lifelong learning has become central to the policies of the Hong Kong Government.

In 1997, Wong Wing-ping, then Secretary of Education, Hong Kong Special Administrative Region (HKSAR), indicated in the opening paragraph of the Policy Objective for Education and Manpower Bureau that education is the key to the future development of Hong Kong. Like other societies, Hong Kong must face the challenges of the 21<sup>st</sup> century. Therefore, there is a strong need to prepare Hong Kong for a rapidly changing, knowledge-based global society (Wong 1997).

In his 1998 Policy Address and for the first time, Tung Chee-hwa, Chief Executive of Hong Kong, mentioned that lifelong learning is a foundation of our educational system (Tung 1999). Tung aspired to build a knowledge-based society under his reign. *'If Hong Kong wishes to become a knowledge-based economy in the information age, we must continue to innovate and change. This is why we must embrace "Lifelong Learning"'* (Tung 1999 p.20).

In 1999, the Education Commission (EC) announced that the age of lifelong learning has dawned. Learning is no longer the prerogative of those aged 6 to 22 (Education Commission 1999). Hence, in 1999, a three-phase comprehensive review of Hong Kong's educational system commenced (Education Commission 1999a).



In 2000, the Education Commission advanced an Education Reform Proposal for the educational system to meet future challenges. The proposal sought to develop Hong Kong into a society that values lifelong learning. There should be diversified learning channels and opportunities to meet learning needs. Two consultation documents were published: (1) “Learning for life—learning through life: Reform proposals for the education system in Hong Kong,” which focused on reforming the educational system, and (2) “Learning to learn: the way forward in curriculum development,” which focused on curriculum changes. To lay down a framework for discussion, the documents asserted six visions of the educational reform, five guiding principles of future educational development, eight key learning areas, and nine general skills and corresponding supportive values and attitudes (Education Commission 2000 a).

The government hoped to prepare Hong Kong for lifelong learning through educational reform. Hence, if we are determined to develop lifelong learning in Hong Kong, we should know where we are, what we currently have, and where we should go. We need to gather basic knowledge and firsthand information on lifelong learning in the context of Hong Kong’s educational system and in terms of readiness and infrastructure.

### 1.3 Preparedness for Lifelong Learning

Although transforming Hong Kong into a society of lifelong learners requires time and immense resources, the government decided that its benefits are worth pursuing. Witnessing local and global forces, as well as current and forthcoming changes and challenges, the government felt compelled to devise a new survival strategy.

*‘Education will become the centre of the knowledge society, and the school its key institution’ (Drucker 1996 p. 405).*

In the first place, learning is about the acquisition of knowledge and skills. As such, lifelong learning is indisputably important as Hong Kong struggles through economic downturns and as it manages to face the future challenge of becoming a knowledge-based economy.

The onslaught of the Information Revolution, coupled with the Asian economic crisis, has led to unprecedented unemployment rates in Hong Kong (Young 2000). Today, the government is forced to move away from its traditional mode of looking at education. It is beginning to recognise the central importance of continuing education and lifelong learning in maintaining Hong Kong’s economic competitiveness. Hong

Kong, as is the case elsewhere, has strong economic justifications for investing in lifelong learning (Chung, Ho and Liu 1994).

Second, the influence of globalisation on Hong Kong as an international city is unavoidable. Globalisation requires people to prepare themselves for a knowledge-based society.

The forces of globalisation and rapid advances in science and technology have prompted governments all over the world to introduce a plethora of reforms to their education systems in the hope that they will make their respective workforces and economies more productive and competitive (Ho, Morris, and Chung 2005). The winners will be those who excel in this highly competitive environment. Undeniably, Hong Kong is much under pressure to shape up and to partake in this global drive for excellence.

Third, educational policy has long been linked with the economic concept of human capital. Hong Kong's primary asset is its people, and how we invest in our human capital is at least as important as how much we invest.

In this world, socio-economic well being heavily depends on human factor and knowledge base (Paye 1995). This concept springs from an elementary principle in economics— the factors of production (i.e., land, labour, and capital) (Bray 1997a). The concept of human capital is over 200 years old, dating back to the time of one of the founding fathers of economics, Adam Smith. Human capital refers to the skills of the labour force.

Human capital suggests that an individual's demand for education is automatically transformed into real human capital. The human capital theory promotes the idea that education is a very powerful individual and social lever. It provides a rationale for investing in people's skills. Better educated people and nations will earn more, hence prospering at a faster rate. Moreover, public investment in education can reduce income inequality and eradicate poverty (Vandenberghe 1999). A rate of return on investment in education can be calculated in the same way as the rate of return on other types of investment (Bray 1997a). However, an important distinction should be made between private and social rates of return. Private rates of return are calculated from the viewpoint of individuals, while social rates of return are viewed from the standpoint of the society as a whole.

From a national perspective, the more money a government puts into education, the more money is contributed to economic development; consequently, there is more economic development. From an individual's angle, the more highly or widely educated a person, the better his/her career prospects are (Lee and Lam 1994).

Therefore, there is little doubt that there is no way out of Hong Kong's bad economy (Young 2000). We need to prepare for our future by investing in human assets or capital through education and training. Rapid advances towards an increasingly globalised and knowledge-based economy implies that the quality of our human resources cannot be taken for granted. Constant improvement and upgrading are required if we are to survive and prosper in the modern world.

Fourth, Hong Kong was once a member of the "four little dragons." It has been an International Financial Centre, serving the finance and business sectors of Mainland China. Hong Kong is still looking forward to obtaining the competitive edge over the thriving mainland economic cities of Beijing and Shanghai (the new competitors) through education and lifelong learning. Guangdong and the Pearl River Delta cities are rapidly developing their own hi-tech industries, while Shanghai (and the Yangtze Delta area) is also competing with Hong Kong as a financial and services centre

(Kennedy 2004). A question-mark hangs over Hong Kong's projected role as a (complementary) "knowledge economy" for mainland China's manufacturing industries.

What is common among the three Asian dragons (Hong Kong, Taiwan, and Singapore) is the importance of human capital (Mok and Chan 2002). To maintain their competitiveness in both the regional and global markets, the governments of these societies have attached great significance to the role of education—the centrepiece of educational reform is lifelong learning. Under the threats of social and economic challenges, the government came up with an educational reform for lifelong learning. Lifelong learning seems to be justified as a powerful instrument and solution to solve many particular economic and social problems faced by the government. Accordingly, *'when a country goes through a period of rapid economic and social changes, or has doubts about the nature of its future role or its likely economic success, attention quickly turns to its education system'* (Mok and Chan 2002 p. 4).

In the 21<sup>st</sup> century, the use of human capital in the information economy becomes all the more critical. Singapore's approach to lifelong learning is pragmatic and rational. It is one of the economic drivers used by policy makers to enhance Singapore's

competitiveness and is viewed as an antidote against unemployment (Kumar 2004).

*‘Many educationalists felt offensively unhappy with the concept that time and money spent in education as investment in human capital. This went against the higher ideals of education for education’s sake that was often a demarcation of responsibility between training and education’* (Lee and Lam 1994 p. 7). Lifelong learning and continuing education have become terms of approbation used by many governments and educational institutions around the world. However, these are disputed terms, broadly reflecting an orientation towards vocational education for the fulfilment of (national) economic goals or a concern with individual self-realisation and social equity (Kennedy 2002a). Expectations on lifelong learning vary among different stakeholders. Do the expectations of the government and people of Hong Kong meet? This study looks into the meaning of and expectations on lifelong learning (1.7.2. subsidiary question a).

Globalisation has led to the marketisation of education. Educational policies are now premised on market considerations and are borrowed from the commercial world (Buchbinder and Newson 1990). The idea of marketisation takes two distinct forms. The first form involves attempts by educational institutions to market their academic

ware in the commercial world; the other form implies the restructuring of educational institutions to apply business principles to their administration. In addition, forces associated with globalisation leads education towards commodification, where learners become consumers and where corporations take over education. It becomes a threat to the autonomy of national educational systems (Smith 2002), and many policy makers automatically look at market “solutions.” Truly, this is an information–driven society, and knowledge has become a commodity that can be sold and marketed like any other (Jarvis 1997).

In the immediate post-war period, adult learning was largely conceived with the social policy perspective—the improvement of general societal conditions. Today, this social policy framework has been replaced by a market model, which has come to dictate that the provision of learning opportunities for adults is a condition for economic competitiveness (OUHK 1996 E804 Study Guide Section 4).

Global trends in educational reform often leave us with the impression that there is no escape from marketisation (Ho et al, 2005). Hence, it is important to appreciate the deeper meanings and goals of education, such as enhancing critical citizenship, personal development, and participation in culture as the right of all students in a



democracy. This study inquires whether we are likely to allow lifelong learning to be market driven.

#### 1.4 Participation and Motivation in Lifelong Learning

Lifelong learning seems like a powerful survival strategy. Is there anyone that would disapprove of lifelong learning? Another area of interest is who decides to participate in lifelong learning and what their reasons are for doing so (1.7.2 subsidiary question b).

Hong Kong does not have a planned system of adult education (Boshier 1997). If this remains the case, pinning any hope on lifelong learning will be difficult.

Adult education programs can largely be grouped into four categories: programs that lead to formal degrees or qualifications, those that qualify people through professional recognition (e.g., law and accountancy), those that provide recognised skills (e.g., in language and secretarial work), and those for personal interest and individual development (e.g., courses in art and leisure) (Cheng 1997).

Adult education, which is geared towards the job market, is primarily provided at post secondary level (Cheng 1997). In a survey on the demand for continuing education in Hong Kong (School of Professional and Continuing Education SPACE Research Report No.7, 2001), it was estimated that 1.16 million people were engaged in continuing and professional education (population at that time was 5,333,610). Most of them pursued more award-bearing courses, which they considered useful in their career development. This was at the expense of short courses, which were mainly taken for interest and personal development.

Similar to the respondents in the School of Professional and Continuing Education (SPACE) report, learners at OUHK study for higher degrees and professional qualifications. What drives them? Why do they choose to participate in lifelong learning, and how is their lifelong learning sustained? To answer these questions, studying the motivations, facilitating factors, and deterrents of lifelong learning is necessary (1.7.2 subsidiary questions b & c).

Motivation describes an action, which is produced by conscious or unconscious forces, that determines behaviour (without any moral considerations) and accounts for how we do things (Edwards 1999; Larcoix and Assal 2000). It is also a process rather than

a behavioural outcome (Huitt 2001). Motivation is an internal state or condition (sometimes described as a need, desire, or want) that serves to activate, energise, and direct behaviour.

Motivation is no longer an observable event, which is simply explained by reductionism. A few decades ago, supporters of active education denounced the use of extrinsic motivation in the educational context (Larcoix and Assal 2000). In today's view, motivation is considered to stem from a person's perceptions and expectations on what is happening to him/her.

Many Hong Kong adult learners take further studies for career enhancement, but not making a simplistic distinction between two groups of people is important (Kennedy 2002b). One group has intrinsic motivations, studying for interest, while the group has extrinsic motivations, doing things to achieve their goals. Do lifelong learners care and are aware of the distinction? Why and why not? (1.7.2 subsidiary question b)

This study considers that the motivation of lifelong learners is a complex system, consisting of a number of variables. This issue will be more lengthily examined in the next chapter.

There are five factors behind the process and sources of different extrinsic and intrinsic motivators: (1) instrumental motivation (rewards and punishers), (2) intrinsic process motivation (enjoyment and fun), (3) goal internalisation (self-determined values and goals), (4) internal self concept-based motivation (matching behaviour with internally-developed ideal self), and (5) external self concept-based motivation (matching behaviour with externally-developed ideal self) (Leonard, Beauvais, and Scholl 1995). Meanwhile, motivation can be viewed both as a process and an outcome. As such, motivation works in four ways: by level of goal, by saliency of perception, by stages of action, and by the nature and degree of mental processing (Smith and Spurling 2001).

This study aims to explore both intrinsic and external motivators. It explores the dominant driving forces (external and intrinsic motivator) behind lifelong learning and the possibility of identifying a framework of motivation for lifelong learners.

In Hong Kong, justifications for investing in lifelong learning are strong. Continuing education has a consumption side as well as an investment side (Chung et al. 1994). In terms of the number of students (consumers), the number of institutional providers (suppliers), and the number of offered educational programs (products), Hong Kong

has become an extremely large educational market (Lee and Lam 1994). The right market strategy can recruit more students. Lifelong learning opportunity in Hong Kong is largely market driven (Cribb 2004). The government's approach allows the boundaries of adult education to be regulated by markets (Mok 1997a). In terms of outcomes, lifelong learners can be categorised into three types of adult learners, namely, the goal oriented, the activity oriented, and the learning oriented (Kirazoglu, Qkcabol, and Unluhisarcikli 1998). How are these categories applicable to Hong Kong's lifelong learners? (1.7.2 subsidiary question a,b)

People may be deterred from participating in lifelong learning for a number of reasons. This study attempts to explore factors hindering lifelong learners from learning. There are neither policies nor plans for adult education in Hong Kong (Cheng 1997). The development of adult education in Hong Kong is therefore largely driven by market forces. Further, the obstacles faced by people who fail to participate in adult education include situational, institutional, and psychological factors. Among the psychological factors, previous learning experiences, self concept, expectations, attitudes towards schools, and teachers and learning are the most important (Schrader-Naef 1998).

### 1.5 Ways to Support Lifelong Learning: Provision and Practice

In practice, current provisions for adult education are focused either on the economic and societal or in individual gains/needs. Providers may be classified into two: modernisers and progressives (Ball 1990). In accordance with economic discourse, modernisers stress that the provision for adult learners should meet the needs of the industry and economy, should be in response to the requirement of markets, and should be with the critical influence of employers. In contrast, taking the person-oriented and learner-centered approach, progressives underline the provision of adult education based on the needs of citizens, moral questioning, and responses to the requirements of the community.

Similarly, the provision of adult learning can be categorised into market models: progressive-liberal welfare models and social control models (Griffin 1989). Adult education policy is a welfare policy (i.e., a service offered to the recipients). It is a form of social engineering designed to meet the needs of society (Jarvis 1993). Hence, instead of looking at lifelong learning from the perspective of social and economic policies using the human capital approach, we should have a more humanistic (individual oriented) and educational (learning perspective) view of lifelong learning. Further, education and self-development are on-going processes that enable us not

only to cope with changes but also to develop continuously throughout life in the process of lifelong learning (Melton 2002).

Ostensibly, current trends in lifelong learning development are controversial and confusing. In terms of ideology, some view lifelong learning as the process or outcome of learning. Adult education, continuing education, further education, and lifelong education all reflect the importance of education programs as educational processes, their primary means of improving the quality of a person's life, and the philosophy of equal opportunities for all citizens of a society to participate in education for as much or as far as their abilities and interests take them (Griffin 1989; Lee and Lam 1994).

Some incorporate lifelong learning into the learning approach (formal or informal) and/or learning process (contents and format). Lifelong education is different from lifelong learning. The former is concerned with more formal approaches to learning and includes schools, colleges, universities, and organisations responsible for vocational training, while the latter develops through primary and secondary socialisation (Maslin-Prothero 1997). People who encourage the cultivation of lifelong learning skills are our primary caregivers, families, friends, and ourselves. In

terms of contents and formats, lifelong learning may also be viewed as all learning from birth to death, formal, informal, vocational, and social (Arnesen 2001). Given different views about lifelong learning, achieving a consensus about lifelong learning is difficult.

A simpler view is that lifelong learning refers to a wide range of learning activities. Education does not end with schools or even universities (Young 2000). The continuous upgrading of knowledge, skills, and concepts implies continuous learning—“lifelong learning” and “lifewide learning.”

Given these, there should be a paradigm shift from teaching and training towards the concept of learning, involving a switch from a “supply-driven” view to a “learner-centered” approach (Field and Leicester 2000). Individual values and self-actualisation direct our own learning. To face the changes, we must be able to think critically and we must be challenged. Hence, the role of critical thinking becomes increasingly important. Thinking is the cognitive activity involved in making sense of the world around us. Individuals who critically think develop the capacity to reason and to form sound judgments (Thomas 2001).



Making lifelong learning a reality (Paye 1995 p.1),

*'urges for a strategy based on a flexible framework of Lifelong Learning, extending from pre-schooling, through all stages of education at primary, secondary and higher levels, to continuing vocational training in educational and labour-market institutions, informal learning on the job, and self-directed and co-operative learning at large in society'.*

Therefore, this study is interested in determining whether we can come up with (1) a balanced strategy, which satisfies both the needs of individuals and society, and (2) medium- and long-term flexible strategies, infrastructure, and logistics, which sustain the development and implementation of lifelong learning.

Further, the economic model of the human capital theory places emphasis on skills and qualifications for economic competitiveness, offering a limited view of the role of education and training, and suggesting the idea of social capital as a means of helping explain patterns of participation in lifelong learning (Edwards et al 2002). Social capital emphasises informal relations of trust, and it can be viewed to provide a rationale for community-based policies to support social inclusion and cohesion. A

detailed explanation of social capital is included in the next chapter.

To pave the way for lifelong learning, the following barriers must be cleared: the inability of initial schooling to provide all students with high-quality and relevant foundational skills and knowledge that provides the appropriate bases for lifelong learning and work; the failure of the current educational and training systems to address the increasingly diverse demands for learning opportunities with high quality and relevance; the high cost of education and training relative to competing demands for both public and private resources; and the inadequate promotion of self-directed learning other than through educational institutions (Paye 1995).

These suggest that we should have a framework of lifelong learning that incorporates factors, such as motivation, participation, education, learning, private and social resources, and learner centeredness. Considering the learner-centered learning approach, this study aims to identify the roles of distance and open learning mode in developing lifelong learning. In particular, the use of OUHK's self-directed mode of learning in promoting lifelong learning is studied.

## 1.6 Assumptions of the Study

The assumptions of the study, which were drawn from the literature and from personal reflection, shaped this study's course of action and provided preliminary answers to the research problems. The following assumptions helped the author compare empirical data on lifelong learning collected from the literature, possibly generating new ideas for further discussion:

- a) Lifelong learners are extrinsically motivated and goal-oriented.
- b) Participation in lifelong learning is driven by socio-economic gains and needs, as well as by market forces.
- c) Lifelong learning is viewed as a strategy to live.
- d) The current approach—belief in and provision of lifelong learning—is not derived from the ideas of lifelong learning, personal development, and learner-centeredness.
- e) To a certain extent, the distance and open learning mode facilitates lifelong learning development.

## 1.7 Central and Subsidiary Questions (research questions)

This thesis is entitled "Learning through life: A study of learners at OUHK." This study aims to a) understand the nature, extent, and patterns of the experiences and

opportunities of OUHK learners as adult/lifelong learners; b) explore their strategies in engaging and pursuing lifelong learning at OUHK; c) understand the role of distance and open learning in lifelong learning; and d) explore a framework of learning in relation to the current policy on lifelong learning.

#### 1.7.1. Central question of the study

This study seeks to determine how lifelong learning is fostered and sustained amongst learners at the OUHK.

#### 1.7.2. The subsidiary questions of the study

Specifically, the study aims to answer the following questions:

- a) What does lifelong learning mean to OUHK learners?
- b) What motivates students to engage in lifelong learning?
- c) What deters students from engaging in lifelong learning?
- d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?
- e) Is it essential to develop the ability for reflection and critical thinking in lifelong learning?

- f) Why do people choose the distance learning mode?
- g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?
- h) In what ways should the Hong Kong government influence the development of lifelong learning?

### 1.8. Justification of the Study

Lifelong learning is a complex issue. There is no single universal explanation that dictates what lifelong learning is, let alone its development. The researcher's interest in lifelong learning grew because as what Coffield (2000a) argued, the political and educational discourse surrounding a learning society and lifelong learning was shot not only by extreme conceptual vagueness but also by "factual" assumptions and assertions, which are unsupported by any hard evidence. Examining the current situation by investigating the experiences of people who are pursuing lifelong learning, such as OUHK learners, and linking such situation to the future offer a good opportunity for the collection of empirical data.

In the first place, lifelong learning is, by no means, an easy term to understand and define. Undeniably, everyone learns through life, from the cradle to the grave. An

empirical study on what people do in their lives will provide some evidence on what lifelong learning is.

Second, lifelong learning is a unique and individual experience, which is difficult to universalise and generalise. A study focused on a group of people (lifelong learners) may help generate clues to understand the nature, pattern, and development of lifelong learning.

Third, lifelong learning in Hong Kong is still developing. The study will help us draw lessons from the current state of lifelong learning in Hong Kong, thereby implying what we should do.

Fourth, OUHK learners who are working adults and who have a sound record of continuous learning (higher diploma to bachelor's degree, bachelor's to master's degree) have a pool of success stories on lifelong learning. Through the distance and open learning modes, it is no doubt that they offer a sensible case of lifelong learning to be studied.

As a consequence, this study makes an in-depth exploration of the different aspects of lifelong learning by reviewing the lifelong learning experiences of the author (both as a part-time tutor and a learner) and of OUHK learners.

### Conclusion

This chapter began with an introduction of the concept of lifelong learning in the context of Hong Kong. Different perspectives and implications of lifelong learning were discussed. The goal of the study is to identify our position in the process of the development of lifelong learning by examining the lifelong learning experiences of a group of OUHK learners. Hopefully, this study will contribute to the development of lifelong learning in Hong Kong.

## Chapter Two: Literature

### Introduction

Lifelong learning is a poorly defined term and concept. It is viewed by different stakeholders differently. This study tries to look into lifelong learning from the perspective of the end-users and participants—the lifelong learners.

This chapter aims to (i) explore the notions of lifelong learning—the fundamental and evolving concepts of lifelong learning and lifelong education; (ii) examine lifelong learning in relation to education, training, motivation and participation, learning styles, personal and social needs, human capital and social capital, policy and strategy, learning society and learning culture, and financing; (iii) review lifelong learning and the Education Reform in Hong Kong—its visions, progress, and shortcomings; (iv) look into distance and open learning, particularly the role of the Open University of Hong Kong in facilitating lifelong learning for adults; and (v) share other studies on lifelong learning.

#### 2.1. Lifelong Learning: Fundamental and Evolving Concepts

Lifelong learning is used in a wide variety of contexts; hence, its definition depends



on individual conceptions. There is a lack of consensus on what lifelong learning is, what more a clear operational definition of lifelong learning. In the first, place lifelong learning is viewed as an ideology. Such as most significant ideological concepts, lifelong learning is variously defined and is used by players in the social, political, and educational arenas (Taylor 2002). It may also be equated to a product, a process, or an ideal; what it might be for (e.g., economic competitiveness, social inclusion, and personal development); and what it might include (i.e., whether it is all learning form the cradle to the grave or just post-compulsory learning) (Reeve, Cartwright and Edwards 2004).

The concepts and understanding of lifelong learning vary among different stakeholders. Therefore, the definition of lifelong learning is not only debatable, but its application is also ambiguous. In fact, the operationalisation and implementation of lifelong learning has not even been widely practiced or achieved (Aspin and Chapman 2000). It has simply been applied primarily on a piecemeal basis. What then is lifelong learning to the public, particularly to OUHK lifelong learners? Is it an ideal, philosophy, perspective, methodology, policy, or practice (1.7.2 subsidiary question a and 7.1 Implications)? The purpose of this section is to inquire into the fundamental and evolving concepts of lifelong learning

Greek philosophers believed that lifelong learning is fundamentally good for personal satisfaction, fulfilment, and social order. Socrates, Plato, and Aristotle laid the philosophical foundations of lifelong learning (Lewis 1981; Shak 1989). Socrates considered lifelong learning as the key to happiness and a “healthy soul.” Plato claimed that lifelong study is essential to the control of the immortal soul and to the right ordering of society. Meanwhile, Aristotle stressed the role of lifelong study in achieving one’s purpose in life. Literally, education is clearly “for life,” and thus it is redundant to use the adjective “lifelong” for education (Lawson 1982).

Lifelong learning is fundamentally beneficial to both the country and its people. It promotes economic competitiveness, social inclusion, and personal development, among others (Reeve et al 2004). Currently, lifelong learning is no longer a matter of personal or private concern; it is a matter of political and international agenda.

In the late 1960s and early 1970s, lifelong education was promoted by the United Nations Educational, Scientific and Cultural Organisation UNESCO; permanent education was launched by the Council of Europe; and recurrent education was proposed by the Organisation for Economic Co-operation and Development (OECD).

In the 1960s, the concept of lifelong learning was parallel to recurrent and permanent

education, and to the role and nature of educational provision (Faure, Herrea, Kaddowa, Lopes, Petreovsky, Rahnema and Ward. 1972; Lengrand 1975). The UNESCO publicly advanced the idea and significance of lifelong learning in 1970. Lifelong learning thus became a “master concept” during the 1970s.

Lifelong education is a response to specific demands (e.g., social, existential, economic, and cultural demands) at a specific period (Gelpi 1979). With this definition, expectations on lifelong education are increasing. Further, the involvement of leading international organisations makes lifelong learning not simply an individual/community concern but also a global and political issue (Tight 1996). With regard to increasing economic globalisation, international organisations, such as the UNESCO, OECD, Council of Europe, International Labour Office, and World Bank, have developed international consciousness and cooperation in the areas of adult education and training through policy making.

More people are becoming involved and are forming opinions on lifelong learning. Consequently, through the works of the UNESCO and OECD, lifelong learning has been advanced as an urgent policy (Cropley 1977; Edwards 2001). Their respective prescriptions for lifelong education and recurrent education continue to persist even if

educators ignore them.

Amid the conflicting views and the confusion, the nature and focus of lifelong learning have been blurred. In the 1990s, at international policy level and in many individual countries at the national level, lifelong learning became an umbrella term, which subsumed part or all of what might have been earlier referred to as “lifelong education,” “recurrent education,” “popular education,” “adult education,” or simply “post-initial education and training.” Examples are the European Union’s “year for Lifelong Learning” in 1996, OECD’s report on “Lifelong Learning for All” in 1996, and Taiwan’s “Year of Lifelong Learning” in 1998 (Hodgson 2000).

It is worth noting that the turning point of lifelong learning comes from the UNESCO’s Delors Report (1996) on education for the 21<sup>st</sup> century. According to Delors (1996), there are four pillars of education: learning to know, learning to do, learning to be, and learning to live together. Of these four pillars, the first three are essential for the sound development of persons, communities, and individual nations.

The fourth pillar is more global in nature

“Learning to know” is concerned with personal ability, such as one’s concentration,

memory skills, and ability to think. It is a fairly broad education concept, which requires in-depth analysis and understanding.

“Learning to do” is concerned with personal competence in the field of occupational training. It is not only to learn a profession but also to learn competencies in dealing with different, often unforeseeable, situations and in working with teams.

“Learning to be” aims for education to contribute to every person’s complete development—mind and body, intelligence, sensitivity, aesthetic appreciation, and spirituality.

“Learning to live together” focuses on reducing world violence and on raising awareness of the similarities and interdependence of all. People should learn how to manage inevitable conflicts in an intelligent and peaceful way.

Lifelong learning itself is not far from lifelong education if they are considered strategies to meet the demands of individuals and society (Lawson 1982). The UNESCO’s definition of lifelong education is rooted in the humanistic tradition, which makes it different from that of the OECD. However, based on the recent works

of the OECD, UNESCO, European Parliament, and Nordic Council of Ministers, there are many broader and more multi-faceted ways of conceptualizing lifelong learning (Aspin and Chapman 2000). Instead of viewing education as instrumental to the achievement of an extrinsic goal, education may also be perceived as an intrinsically valuable activity, something that is good in and for itself.

The term “lifelong learning” is now more often used than “lifelong education.” Are these two terms interchangeable? What makes them different from each other? The origins of the concept of lifelong learning can be traced back to the 1920s when the term “lifelong education” first appeared in English translations linked to discussions on Nordic educational systems (Hodgson 2000). Lifelong education and lifelong learning share common features and origins. The idea and concept of lifelong learning is closely related to lifelong education (Jarvis 1995). Such idea has been around for some time, with its origins dating back to the writings of Dewey, Lindeman, and Yeaxlee in the early 20<sup>th</sup> century.

Lifelong learning refers to the learning process, while lifelong education refers to the structural and methodological aspects (Maslin-Prothero 1997; Ng and Young 2000).

Lifelong education is concerned with more formal approaches to learning and

includes schools, colleges, universities, and organisations responsible for vocational training. On the other hand, lifelong learning develops through primary and secondary socialisation. The people who can encourage the cultivation of lifelong learning skills are our primary caregivers, families, friends, and ourselves. Education is more formal than learning.

The centrepiece of lifelong learning is learning. Lifelong learning not only extends the scope of learning but also promotes a limitless and boundless macro view about learning, which is most probably for adult learners. Faure et al (1972) and other reports and articles published by the UNESCO suggested a broad concept of lifelong learning, including informal, non-formal, and formal educational settings, throughout the entire lifespan of individuals. Further, lifelong learning has lifelong and lifewide dimensions. Lifelong education is the continuity of education after formal schooling. It lies (1) in extended educational opportunities beyond traditional elementary and secondary schooling; (2) in community agencies that work as educational partners of schools; (3) in the flexibility of educational programs, meeting the needs of diverse stakeholders; and (3) in the timely provision of educational activities from birth to death (Dejnozka and Kapel 1991).

Above all, the focal point of lifelong learning is human beings. Lifelong learning is the development of human potentials through a continuously supportive process, which stimulates and empowers individuals to acquire all the knowledge, values, skills, and understanding required throughout their lifetime (Longworth and Davies 1996). Hence, the shift from lifelong education to lifelong learning is highly significant (Ng and Young 2000). It reduces the emphasis on the role of structures and institutions, and puts individuals at the centre instead. This shift in perspective has many implications for educational policies and practices: individual competence and skill are what counts, not educational qualifications per se.

On one hand, education is a public phenomenon, and it provides public recognition of learning. On the other hand, learning can be more individualistic and takes place outside educational institutions—at work or at a distance, without the presence of a teacher (Jarvis 1998).

In view of the recent economic and technological changes and advancements, lifelong learning may not be more ideologically powerful than lifelong education. However, lifelong learning is more effective and proactive as it takes a more flexible and comprehensive approach and strategy in dealing with a train of incessant changes and



uncertainties. In the first place, regardless of what (contents) and where (place) people learn, lifelong learning is concerned about the through-put (ways and environment) of learning, which facilitates and makes learning happen.

In general, the Chinese have a good understanding of learning, which is in accordance with the philosophy of lifelong learning. Confucius, the great Chinese philosopher, taught the value of learning. Confucian scholars and the Chinese youth memorise the goals of superior learning (1) to cultivate one's personal knowledge, (2) to help others realise themselves, and (3) to strive for moral excellence (Faure et al. 1972).

Lifelong learning has re-emerged in the late 20<sup>th</sup> century due to globalisation. However, it is now dominated by economic determinism. Although not a panacea, lifelong learning is viewed as an essential means to manage the social and economic difficulties of countries. According to the International Labour Organisation (2000), not only is lifelong learning a broad term, but it is also a magic word—a guiding principle for strategies concerned with objectives, from a nation's economic well being and competitiveness to personal fulfilment and social cohesion (ILO 2000).

To sum up, first, the necessity and importance of lifelong learning and education are

justified by change, which has been a dominant discourse in the last two or three decades. Second, lifelong learning and education are linked to the requirements of both the economy (globalisation and competitiveness) and the larger society. Third, emphasis is placed on the role of individual adults in taking charge of their learning, with the promise of eventual “self-fulfilment.” Fourth, lifelong learning requires the involvement of providers beyond the existing educational system. Fifth and finally, less has actually been specified about the contents or costs of lifelong learning (Tight 1998). This is where idealistic visions begin to change against pragmatism and prioritisation.

## 2.2 Conceptual Framework of Lifelong Learning

Different ideas of lifelong learning have been reviewed. This section looks into the key concepts and components of lifelong learning that need critical examination.

### 2.2.1 Education, training, and lifelong learning

Generally, training refers to the learning required for certain tasks to be performed, while education refers to learning for learning’s sake or for personal development. Learning is supposed to be an enjoyment in itself, whether it helps one make money or not (Lee and Lam 1994). The term “lifelong learning” is indeed confusing because

the notion of lifelong learning can subsume all kinds learning activities, such as education, training, development, adult education, continuous education, recurrent education, lifelong education, and so forth.

While lifelong learning encompasses a wide range of learning activities, its scope should not be confined to education and training. The importance of the ideas of a knowledge economy and a learning society leads to the need for a new philosophy of education and training, with institutions of all kinds—formal and informal, traditional and alternative, public and private—having new roles and responsibilities for learning (Aspin and Chapman 2000).

The end products of education and training are, of course, qualifications. Indeed, the meaning of qualification is controversial. Qualifications assist in job recruitment (Smith and Spurling 1999). They can also give important incentives to individuals by giving social recognition and approval to the learning they have achieved. There is a central dilemma between qualifications as an incentive and as a useful source of information for third parties. However, in the modern economy, it cannot be assumed that graduates or holders of qualifications will maintain and enhance knowledge after receiving their awards.

### 2.2.2 Learning OF life and learning FOR life

Lifelong learning is a long and big word. It presents a confounding issue in terms of its concept and context, theory and practice, and thinking and action. With its metaphorical meanings, the word “lifelong learning” speaks for itself. If we break lifelong learning into its three components (i.e., life, lifelong, and lifelong learning), it clearly speaks about learning in human life/living, in such a period of time, to respond to changes in the world. Learning is a vital activity in life (Editor 2005). Sounding more holistic and humanistic, learning OF life refers to an individual mission and empowerment process. According to the European Commission (1996), learning OF life, instead of learning FOR life, is the central focus of lifelong learning. In addition to economic and employment imperatives, lifelong learning begins in the cradle and ends at the grave, embracing democratic participation, personal fulfilment/recreational learning, and the aging process. Indeed, *‘lifelong learning is about being and becoming’* (Editor 2005 p. 284).

Lifelong learning deviates from the traditional differentiation of learners based on age and life stages. It emphasises the continuity of “learning” (Harrison, Reeve, Hanson and Clarke 2002). *‘Learning as a preparation FOR life has been displaced by learning as an essential strategy for successful negotiation of the life-course, as the*

*conditions in which we live and work are subject to ever more rapid change'* (Field and Leicester 2000 p. 137). Learning is the essence of lifelong learning; it may cover anything from the processes to the products of learning. Thus, it is so diversified that one can pursue learning for any reason and in different contents, formats, and ways.

This study adopts holistic/humanistic-oriented learning as the ideology of lifelong learning. It is intended, on-going, and wide learning, and is designed for the acquisition and integration of knowledge through life. Pursuing lifelong learning requires the necessary learning attributes (e.g., attitude, knowledge, and skill) and a supportive infra/and suprastructure—environment, system, and strategies. Lifelong learning, which is based on the continuous learning of individuals, is built upon a learning and an education system with seamless boundaries and flexible structures.

### 2.2.3 Motivation and Demotivation (participation and non-participation)

Assuming that there are ample learning opportunities, why do we bother to learn and how do we become committed? There are many learning opportunities in adulthood, which is a time of growth and change, and learning may be affected by adverse changes (e.g., unemployment) or positive changes (e.g., opportunities to return to study when childrearing responsibilities end) (Merriam and Caffarella 1999). Hence,

learning involves the reorganisation of experiences. However, how an adult embarks on this new learning—wholeheartedly, half-heartedly, cynically, anxiously, or reluctantly—is a major factor determining whether learning will be successful or not.

Normally, all human behaviour is goal oriented. People want to gain health, time, money, and popularity. They want to improve themselves; they want to be good parents and to be sociable, hospitable, and up-to-date. Moreover, people want to express their personalities and to resist domination by others; they want satisfaction.

People want to save time, money, work, discomfort, and worry. Hence, the best way to motivate is to utilise the problem-centered approach. Problems may be identified, and solutions evolve from within the local framework and with the help of local people (Bhattacharya 1987). There are a number of common and important reasons why people pursue lifelong learning, and these reasons must be explored.

In the past, there were two ways of viewing “the ultimate” ends of education (Hook 1946). One way relied on an immediate, self-certifying intuition about the nature of man, which is essentially theological and metaphysical. The other relied on the nature of man, which is based on the timely development of careers and in relation to the world of things, culture, and history of which one is an inseparable part.

Lifelong learning is a deliberate and conscious activity. It is intentional—with a definite and specific goal. This goal is the reason why learning is undertaken, and the learner intends to retain what has been learned for a considerable period of time (Knapper and Cropley 1991). However, learning, as a cognitive process internal to the learner, can occur both incidentally and in planned educational activities, and only the planned activities are what we call education (Merriam and Brockett 1997). Regardless of the reasons, goals, intentions, and planned/deliberate actions of learning, what makes lifelong learning significant is the subjective, personal, and individual experience of learning.

Learning is a reasoning process for deciding “what to learn,” and these rational self-interested objectives can be explained by the information gap theory (Loewenstein 1994). Individuals start with what they previously know (or think they know) on a given topic. When they encounter an external observation that is perceived to be inconsistent with what is known, a gap is generated. Such gap is immediately experienced as an unpleasant sensation that they feel driven to remove. The gap motivates individuals to seek insights that reconcile the new observation with the previous one by reordering their previous knowledge in a way that accommodates the new observation. In addition, the learning drive, which is a potent and an

independent force behind the accumulation of information and knowledge of all kinds, is expressed in the consciousness by an emotion, which is variously labelled as inquisitiveness, wonder, and curiosity (Lawrence and Nohria 2002).

Learning is a cumulative and unique learning experience, which cannot be isolated from self-concept. As the learning process progresses, individuals accumulate increasingly comprehensive and coherent worldviews, as well as complex sets of beliefs about themselves (i.e., self-concept or self identity) (Lawrence and Nohria 2002). These self-beliefs provide the basis of self-esteem. Self-belief explains how humans build ideologies and broad explanations about their lives and their environments.

*'To understand a person's motivation, it is not enough to look at where it is in the action hierarchy; and at its saliency; and at the learning stage the person has reached.*

*We must also ask about the amount of mental processing which goes into the motivation; and how far that is rooted in, and sensitive to, the inscrutable mental world of the subconscious'* (Smith and Spurling 2001 p. 17). Motivation is therefore a complex process, and its driving forces are multi-dimensional.



In a study using open semi-structured individual interviews of 36 students from three universities in Hong Kong, it was found that motivation involves a framework with six continua having positive and negative poles (Kember, Hong and Ho 2008). The positive poles of the six continua are compliance, individual goal setting, interest, career, sense of belongingness, and university lifestyle. The formulation of motivational orientation is consistent with contemporary social cognitive theories of motivation. It has been characterised as a multifaceted phenomenon, with students expressing context-dependent multiple motives. This reflects that the core motivators are both goal (career motivation) and interest oriented (intrinsic motivation) and are influenced and maintained by a web of social factors (relationships).

In earlier studies on post-initial adult education, the following motivational factors of adult learners were identified and explained: bearing courses as consumption (for intellectual pursuit and social service), jobs (for applicability to present job, greater chance of job promotion and helpfulness to job change), and friends (influenced by friends and making friends) (Chung, Ho, and Liu 1994).

Further, Chung (1997) asked respondents to rank-order a list of motivators for participation, namely, knowledge, community service, present job, promotion, job

change, friends' influence, boss's encouragement, emigration, and making friends.

The findings indicated that knowledge is the most important motivator, and making friends is the least important. Job-related factors (i.e., present job, promotion, and job change) were ranked at the middle. This indicates that although there are priority settings of different motivators, they are themselves a web of dependent and interacting factors that support one another.

The primary motivation of Hong Kong adult students for taking continuous education (CE) courses is acquiring new skills to adapt to changes in the workplace (Chang and Tam (1997). In Hong Kong, there is a growing demand for professionally and vocationally relevant CE programs, such as MBAs. Professional continuing education and the rise of "practitioner researchers" are the current trends in Hong Kong (Jarvis 2000).

Apparently, various studies show that life learning is intentional, purposeful, and goal-oriented. As such, what are the goals of lifelong learners (1.7.2 subsidiary questions b)?

Having examined factors that facilitate participation in learning, it is now time to look at the barriers to the implementation of lifelong learning. Factors deterring adults from participating in learning include the following: no time, inconvenient meeting time, need to take care of the family, lack of course information, inconvenient meeting place, absence of a suitable course, absence of interest, inadequate educational background, and being too old to study (Chan and Holford 1994).

Another view summarises three deterrents. First is the inability of initial schooling to provide all students with high-quality and relevant foundational skills and knowledge that provide appropriate bases for lifelong learning and work. Second, current education and training systems fail to address the increasingly diverse demands for learning opportunities with high quality and relevance. Third, the provision of education and training, relative to competing demands for both public and private resources, involves high costs (Paye 1995).

De-motivators are distracting factors that affect one's determination and course of action to achieve one's chief and key goals. To keep one's motivation to participate in lifelong learning, the number of motivators must be increased and strengthened, while that of the de-motivators should be decreased and weakened.

#### 2.2.4 Learning styles

To enhance the development of lifelong learning, individual learning styles have to be considered. According to James and Gardner (1995 p.19), '*the ways individual learners react to the overall learning environment make up the individual's learning style*'. On the other hand, James and Blank (1993) defined learning style as the complex manner in which learners most efficiently and most effectively perceive, process, store, and recall what they are attempting to learn. A model of learning styles consists of three distinct but interconnected dimensions: the perceptual (assimilation of information) mode, the cognitive (mental or information processing) mode, and the affective (emotional or personality characteristics) mode.

On top of the social aspect of learning, Paterson and Pratt (2007) illustrated learning styles through an onion model, highlighting individual preferences in learning. The outer layer represents instructional and environmental preferences (e.g., kinaesthetic, tactile, auditory, and visual); the second layer denotes the socio-cultural context (e.g., women learn within a personal and relational context); the third layer represents the cognitive style of information processing; and the innermost layer denotes personality differences.

There are four different learners: permanent, instrumental, traditional, and non-learners (Vester 1997). Permanent learners view learning and self development as core parts of their identity. They are self-directed and highly motivated to learn. Moreover, they are critical to outmoded established providers. Instrumental learners take learning as a means to an end, and they are willing to learn when asked by their employers. They also have a strong preference for well-trying and -tested methods. Traditional learners take learning as a core part of their identity. They are highly motivated to learn and have a strong preference for well-trying and -tested methods. They also value academic hierarchies and have great respect for academic providers. Non-learners have a non-academic self-identity. They either avoid or take on organised learning under pressure. They do not believe the effectiveness of learning; hence, they resent all providers.

Learners possess different repertoires of learning strategies; consequently, stereotyping individual learning styles may be inappropriate (Claxton 1996). The attempt to reduce learning styles to two, four, or sixteen pre-determined categories is too crude to do justice to qualitative differences among learners. In the same vein, when the context of learning, the mode of teaching, and the methods of assessment change, adult Hong Kong Chinese learners would adopt new learning styles provided

they are given enough time to adjust (Kennedy 2002a).

#### 2.2.5 Personal and social needs

Many countries around the world, including Hong Kong, use education to meet their social needs and to solve their social problems. For instance, in view of the recent Asian economic crisis, Hong Kong's workforce has to be productive in new ways to sustain a higher value-added economy. Education and training are keys to the productivity of our workforce and are critical to Hong Kong's competitiveness in the future (Enright et al. 1999). A free education market has various educational institutions offering competing learning arrangements aimed at improving people's (vocational) training and qualifications, and at increasing the economy's competitive strength (Alheit 1999).

Lifelong learning and continuing education have become terms of approbation used by many governments and educational institutions around the world. However, they remain to be disputed. They broadly reflect an orientation towards vocational education for the fulfilment of (national) economic goals or for individual self-realisation and social equity (Kennedy 2002b).

However, education seeks both to instil capacities and qualities in students that help them lead creative and fulfilling lives, and to create conditions necessary for the development of a caring and equitable society (Taylor, Rizvi, Lingard & Henry 1997).

Further, in the UNESCO's view, lifelong education/lifelong learning is essentially humanistic (Field and Leicester 2000). It deals with achieving the "fulfilment of man" by flexibly organizing different stages of education, widening the access to higher levels of education, by recognizing informal, non-formal, and formal learning. Education should last for a lifetime and should not just be pinned to schools and universities for the privileged or specialised few.

Lifelong learning calls for the development of human potentials through a continuously supportive process, which stimulates and empowers individuals to acquire all the knowledge, values, skills, and understanding required throughout their lifetime, and to apply them with confidence, creativity, and enjoyment in all roles, circumstances, and environments (Editor 2005).

To take a balanced view, lifelong learning should benefit both the country and its people. It promotes economic competitiveness, social inclusion, and personal

development (Reeve et al 2004). Moreover, the 1919 Report stated that adult education rests “upon the twin principles of personal development and social service.” Current concerns on the development of a learning society look into personal change, economic development, and social control (Coffield 1999).

There is no doubt that lifelong learning bears a dual role in terms of personal and social needs. In classical China, “lifelong learning” was regarded both as an individual and a social ideal (Morgan 2000). How much do learners care for their social and personal needs while pursuing lifelong learning (1.7.2 subsidiary question a)? We should take a two-pronged approach to pursue lifelong learning in terms of personal and social needs.

#### 2.2.6 Human and social capital

To support and enhance the development of a country and its people, investments in both human and social capital are necessary. Economists regard expenditures on education, training, medical care, and so on as investments in human capital. They are called human capital because people cannot be separated from their knowledge, skills, health, or values in the way they can be separated from their financial and physical assets (Becker 1975). Human capital refers to the stock of skills and knowledge



embodied in the ability to perform labor to produce economic value. It is the skills and knowledge gained by a worker through education and experience (Bray 1997b)

In competitive and changing environments, *'learning is viewed as a kind of investment with the returns of qualifications – an instrumental view of learning'* (Field and Leischester 2000 p. 171). In addition, continued access to education and training for all is seen as an investment in the future (Gorard and Rees 2002). It is a pre-condition for economic advancement, democracy, and social cohesion, and a significant factor in increasing personal development and growth. Standards of education and training have direct impacts on the economy. Hence, expenditures on lifelong learning are investments that will surely be recouped.

The expansion of education in the 1960s and early 1970s was predicated upon a generalised human capital theory, which argues that education contributes to the elements of economic growth that could not be accounted for by other factors. This argument about the economic contribution of education was used as a justification for expanded provision and expenditure in the face of increased demand for education. It is based on the Keynesian commitment of welfare states to the principle of equal opportunities for all. Hence, both individuals and society are seen to benefit from this increased provision (Taylor et al 1997).

However, the human capital theory is not a panacea. In fact, measuring human capital has always been a problem (Schuller and Field 1998). Particularly, the intrinsic validity of the measures of investment, such as the numbers of years of schooling and the use of qualifications, is problematic. Further, education did not keep all of its promises over the last two decades (Vandenberghe 1999). Crises in public finances have also progressively persuaded decision makers that each dollar of tax receipt should be spent more efficiently.

Following the economic recession during the mid-1970s, support for the human capital perspective on education went into a “period of eclipse,” although the theory itself appeared to reinforce the use of education as a scapegoat for high levels of youth unemployment and recession. Nonetheless, a reframed human capital theory would come back into vogue in the vastly different political and economic context of the 1980s (Marginson 1993).

A major re-thinking of the role of governments in education and training is required (Paye 1995). A shift in emphasis from formal education in publicly sponsored institutions to self-directed and cooperative learning environments presupposes an appropriate sharing of responsibilities among different stakeholders in education and

training.

In practice, qualifications are generally used by employers and other agencies, such as universities, as “screening” devices rather than solely as signals of particular competencies (Field and Leicester 2000). This instrumental view dominates approaches to lifelong learning and limits the understanding of the nature, aims, and purposes of “lifelong education.”

Emphasis on instrumental views and human investment narrows the scope of lifelong learning. Lifelong learning has not only lifelong but lifewide dimensions (Faure et al 1972).

We need a system to shift from formal study for qualifications to learning that is supportive of individualised and network learning. The economic model of the human capital theory, which places emphasis on skills and qualifications for economic competitiveness, offers a limited view of the role of education and training. We may need an ideology and idea of an active and engaged citizenry in the society of learning, which is not based on the notions of economic prosperity and growth alone. This requires investment not only in human but also in social capital (Alheit 1999;

Edwards, Miller, Small and Tait 2002).

Social capital refers to *'the features of social life – networks, norms and trust – that enable participants to act together more effectively to pursue shared objectives'* (Putnman 1996 p. 66).

Human capital is different from social capital (Schuller and Field 1998). It focuses on individual agents, social networks, and relationships. Human capital assumes economic rationality and transparency of information, while social capital assumes values and norms that are socially shaped. Further, human capital measures inputs with reference to the duration of education or to the number of qualifications, while social capital measures inputs by the strength of mutual obligations and civic engagement. Furthermore, human capital measures outputs in terms of individual income or productivity levels, while social capital measures them in terms of quality of life.

Social capital, a base for informal learning, is the existence of shared networks, norms, and trust. With reciprocal support and a high degree of mutual trust, social capital allows people to share ideas, information, and skills. This, in turn, allows them to

adopt innovation more rapidly and to take common actions to achieve their ends (Field and Leicester 2000). Social capital provides a rationale for community-based policies that support social inclusion and cohesion, as opposed to the emphasis on individual skills in the human capital theory (Edward et al 2002). The people of Hong Kong are accustomed to investment in human capital. Therefore, promoting lifelong learning in Hong Kong is a great challenge.

#### 2.2.7 Policy and strategy

Lifelong learning denotes a wide range of educational activities. When put to practice, it becomes abstract and ideal. The challenge is putting lifelong learning to practice beyond the conceptual realm. *'Lifelong Learning is, of course, both a truism – how can we not learn, in some sense, as we continue living? The point is how to structure, encourage and support that learning'* (Tight 1998 p. 254).

Generations of educational sociologists have demonstrated that the current culture of education has created social division and inequality. There has been a kind of social engineering associated with social democracy and redistributive welfare state functions (Griffin 2000). Earlier, Quigley (1993) suggested two streams of lifelong learning provision policy: social and economic policy. There are market models

(learning is market-led; it is for economic competitiveness and for the society's benefit), progressive-liberal welfare models, and social redistribution models (learning serves social redistributive goals for individual and societal benefits).

Although some states adopted lifelong learning policies in the pursuit of social democracy and market principles (Griffin 1999), the idea of lifelong education, which largely lacks influence in the government, has been displaced by more powerful discourses on a lifelong learning market, where individuals are construed as having to take responsibility for their own learning (Edwards 2001). Thus, today, learning is individualised and market led.

Therefore, lifelong learning, which is enshrined in government policy frameworks, is the rationale that drives reforms to qualification frameworks (Young 2000). Some government policy positions (e.g., United Kingdom's Green paper, *The Learning Age: A Renaissance for a New Britain* – DfEE, 1998) put the case of lifelong learning largely in terms of qualifications for better employment. The arguments on lifelong learning behind the adoption of a policy statement on lifelong learning in 1996 by OECD education ministers are linked mainly to employment and the economy, even if reference is also made to its importance to democracy and social cohesion (OECD

1996).

Policies on lifelong learning should shed light not only on rewards but also on the participation of people. Lifelong learning is now the guiding principle for policy strategies concerned with objectives, ranging from a nation's economic well being and competitiveness to personal fulfilment and social cohesion (ILO 2000).

Social justice may be achieved through lifelong learning (Gorard and Rees 2002). A lack of fairness exists in the distribution of education and its rewards; hence, a widening participation will promote social justice. A comprehensive post school education and training system, in which everyone has access to suitable opportunities for lifelong learning, is needed (Griffin 2000). This is the prevailing political consensus for countering social exclusion, which markets have historically generated.

Governments used to play a social democratic role in providing lifelong learning through welfare policies. Now, they prefer to take a more strategic role in monitoring lifelong learning. These new practices and structures are referred to as "corporate managerialism," a term borrowed from the private sector (Taylor et al 1997).

Lifelong learning cannot be supported in a vacuum; we need to find measures to support and implement it (Edwards 1999). There are different levels of providing lifelong learning opportunities, as well as different stakeholders at different levels—institutional, local, regional, national, and international—and within a range of groups and organisations—employers' groups, trade unions, and professional bodies.

Griffin (1999) argued that we should draw efforts from different parties to work out possible measures to support and implement lifelong learning through strategies rather than through policies. The lifelong learning policies of the UNESCO and the OECD share social democratic roles. Meanwhile, such policies acknowledge the broadening of the concept of lifelong learning and the acceptance of partnership and its strategic role in providing lifelong learning opportunities.

As far as the provision of education/learning within one's lifespan is concerned, a wider social involvement, especially of the community, is imperative (Jarvis 1999a).

Lifelong learning is (1) the process of learning that occurs throughout the lifespan, and (2) the learning that occurs variously in formal institutions of education and training and informally at home, at work, or in the wider community.



In the past, strategies were designed to bring about lifelong learning, such as recurrent education and paid educational leaves. Lifelong learning is increasingly being regarded as a strategic position rather than as an actual object of government policy (Griffin 2000).

Lifelong learning promotes learning while working and working while learning. The strategic role of governments is to develop “bridges” and “ladders.” In other words, the task of governments is one of “managing autonomy and choice” (OECD 1996).

The role of governments is “to monitor the conditions under which markets for learning can lead to responsive and efficient provision,” although they must retain some responsibility (Griffin 1999). It seems that the Hong Kong government should not only play the social democratic role but also a strategic role in lifelong learning.

#### 2.2.8 Learning society and learning culture

There is no universal definition of lifelong learning. We need to think of creating and distributing learning opportunities (Kumar 2004). This study believes that pursuing education and learning through life are the most important tasks in developing a learning culture.

The culture of lifelong learning has been much used in the last few years, but it is seldom defined, and its meaning is contested (Smith and Spurling 1999). Many take it to be the rhetoric of political spin doctors and as a passing fad. At the empirical level, lifelong learning is intended and planned learning, which is more or less continuous across one's lifetime. This leaves room for informal learning, but such must be built with a good solid backbone of intentional and planned learning if an individual or organisation is to claim to be a lifelong learner. At the moral level, lifelong learners will additionally live by four basic moral principles: personal commitment to learning, social commitment to learning, respect for others' learning, and respect for truth.

From the practical approach, a knowledge-based, market-driven economy requires its workers to be well equipped in information technology skills, engineering skills, marketing skills, negotiating skills, presentation skills, and other professional skills (Ho, Morris and Chung 2005). It also requires communication skills, emotion management, time management, reflective skills, interpersonal skills, organisational skills, general skills to learn and to adapt, and—gaining importance by the day—sheer stamina. In addition, the new economy requires the capacity to persevere and to fight against all odds relentlessly. From a liberal humanistic perspective, the revolution in learning or in the new culture of learning must be made a central feature of society for

society's own good (Griffin 2000). We will not be able to survive, compete, and grow as a nation unless learning becomes the culture and lifestyle of our people.

People should be aware of the relationship between learning and real life and should realise the need for lifelong learning. In addition, they have to be highly motivated to carry on lifelong learning and to possess a self-concept favourable to lifelong learning. Further, they need to possess the skills necessary for lifelong learning (Knapper and Cropley 1991).

A number of theories and models of what a learning society might look like range from (1) those that advocate that the whole learning experience is driven by economic relevance and by market logic, and (2) those that maintain that the main goals are personal well-being, active citizenship, and personal empowerment (i.e., becoming capable of making authentic choices) (Fryer 1997).

The current divisive culture of learning can be replaced by a culture of lifelong learning where individuals and society as a whole will become committed to lifelong learning. The traditional distinction between the learning and non-learning needs of individuals should be challenged. A policy to bring this into existence must be

“determined in intention and tenacious in its grip.” In other words, it needs to be socially engineered (Griffin 2000).

The concept has also become part of a trinity—lifelong learning, the learning organisation, and the learning society—articulating the importance of continuing learning for survival and development at individual, organisational, and societal levels (Huges and Tight 1995; Tight 1996).

In the new learning culture, we are the consumers of lifelong learning. Learning opportunities do not only serve the requirements of the consumer society but are also part of it (Edwards 1999). Cultural changes result in a greater emphasis on the individual as a consumer of products and services rather than as the “student” or “client.” A certain form of power is thereby transferred to individuals as consumers, a process enhanced in education and training by the introduction of vouchers for individuals, graduate taxes, and career development loans, among others.

Surely, from the modern and human capital view, we have an existing learning culture, but the development of a new learning culture is necessary.

### 2.2.9 Government grants and self-financed studies

Funding may encourage participation in lifelong learning. Funding education and training in the framework of lifelong learning is of central importance because it can create incentives and reflect accountability, choice, shared roles, and responsibilities (Tuijnman 2002a). For example, education vouchers, which are relatively non-traditional, promise individual consumer choices and put funding on a kind of market basis (Griffin 2000).

Finance mechanisms influence quality, equity, and efficiency in the demand and supply of educational services (Tuijnman 2002a). They can be powerful instruments in influencing the behaviour of learners and the responses of institutional providers, not least because of the information signals they send and the incentives they create.

The increasing demand for education as more learners pursue higher levels and the need to broaden funding in the face of public sector resource limitations have prompted many countries to seek greater partnerships with private sectors (Delors 1996, OECD 1998).

Thinking globally and acting locally may help governments tailor make their lifelong learning funding policy. Different countries place lifelong learning systems on a continuum between “state-led regulated,” “social-partnership regulated,” and “demand-led regulated” (Hodgson 2000). The use of a continuum of this kind recognises the fact that an individual country’s current policies for organizing and funding lifelong learning will, to a large extent, depend on the nature of individual education and training systems it has inherited and the relationship between the education and training system and the labour market in that particular country. Contexts and histories strongly determine how different countries view the concept of lifelong learning, how much they are prepared to spend for it, and the type of policy instruments they adopt (OECD 1998; Hodgson 2000).

To facilitate lifelong learning, we need a new and better funding system.

### 2.3 Lifelong Learning and Education Reform in Hong Kong

The ways to nurture, foster, and implement the ideology of lifelong learning have been discussed. It is necessary for individuals and governments to work together to develop a framework of lifelong learning, which includes both momentum (i.e., values, ability, and efforts) and context (i.e., strategy and policy). Educational reforms

have been enforced, and whether Hong Kong will be a lifelong learning community/city remains to be seen. It is hoped that this study will contribute a small role in accordance with this latest historical development.

### 2.3.1. Education reform: An overview

Mr. Tung Chee-hwa, Chief Executive of the HKSAR, called for a comprehensive review of existing educational policies in his first policy address. A review began in late 1997. The whole review process was divided in different phases (Mok and Chan 2002). In his 2000 Policy Address, Mr. Tung Chee-hwa endorsed the recommendations made by the Education Commission to reform the educational system of Hong Kong. The key elements of the Education Reform came from two documents: (a) “Learning for life - learning through life: Reform proposals for the education system of Hong Kong” (Education Commission 2000a) and (b) “Learning to learn: The way forward in curriculum development” (Curriculum Development council 2000).

#### a) Direction of the reform

*‘... educational system - all -round development and Lifelong Learning*

*...all students - to enjoy learning, communicate effectively and develop*

*their sense of commitment and creativity*

*...flexible and diversified curricula to meet students' learning needs*

*... multiple learning channels - to choose according to students abilities  
and aptitudes*

*... diversity of the education system - to enable schools to develop*

*... to embrace different cultures to enable students to develop  
an international outlook'*

*(Education Commission 2000b; Curriculum Development Council 2000)*

b) Key proposals

*'... from transmission of knowledge to learning how to learn*

*...from over-emphasizing academic studies to focusing on  
whole-person development*

*...from compartmentalised subjects to integrated learning*

*...from reliance on textbooks to use of diversified learning and  
teaching materials*

*...from classroom teaching to learning beyond the classroom,  
with support from the community*

*...from traditional time-tabling to an integrated and flexible  
arrangement of learning time*

*...abolishing premature streaming and providing more*



*opportunities for students to explore their aptitudes and potentials'*

*(Education Commission 2000b; Curriculum Development Council 2000)*

In short, the reform outlined the framework of a person-oriented and holistic educational system, mobilizing different resources, such as individuals and the society, by breaking barriers to the facilitation of learning.

To recapitulate, Hong Kong's Education Reform aimed to (1) build a lifelong learning society, (2) raise the overall quality of students, (3) construct a diverse school system, (4) create an inspiring learning environment, (5) acknowledge the importance of moral education, and (6) develop an educational system rich in tradition but cosmopolitan and culturally diverse (EC 2000b). In addition, the Education Reform was based on five major principles that guide the future development of education in the territory: (1) student focused, (2) no-loser, (3) quality, (4) life wide learning, and (5) society-wide mobilisation (Education Commission 1999b).

### 2.3.2 Education politics

Education politics refers to curriculum-related actions and decisions taken with an education system (Dale 1994).

Conceivably, the reforms initiated in 2000 were part of the continuous educational changes that took place between the pre (1984-1997) and post (beyond 1997) transition period of Hong Kong—from a British colony to a SAR on 1 July 1997. Great challenges come from the co-existence of Hong Kong's capitalism and China's socialist system. The transition from the status of a colony to that of a SAR has required major changes in the curriculum (Postiglione 1996), such as the addition of new subjects, adjustment of existing subjects, emphasis on civic education, and revised policies on the medium of instruction. Education can cushion changes and contradictions during the transition. At the same time, it can be used to resist futures.

Apparently, we are glad to see that the Education Reform addressed some of the long standing shortfalls of Hong Kong's educational system. For example, Yixian (1996), a mainland Chinese educator, criticised that the then educational goals of Hong Kong were far too narrow and were focused on economic and occupational goals. The old educational system stressed the examination of knowledge and ignored the moral education, views on life, and love of country and nation of citizens. Students studied to pass exams, ignoring courses that had nothing to do with exams. They lost the possibility of developing in a thorough and active way.

The Education Reform is an on-going process. Since the 1970s, Hong Kong's educational policies have been changing (Postiglione 1996; Sweeting 1997). A nine-year universal, free, and compulsory educational system was introduced to enhance mass access to education. Tertiary level expansion, school-based curriculum, school management initiatives, direct subsidy schemes, and a target-oriented curriculum came later. Initiatives by the Education Commission in 2000 were breakthroughs. They not only addressed concerns on the structure of the education system but also went back to the fundamentals of promoting the holistic development of student learners. The reform aligned with the essence of lifelong learning. Lifelong learning is the development of human potentials through a continuous and supportive process, which stimulates and empowers individuals to acquire all the knowledge, values, skills, and understanding required throughout their lifetimes and to apply them with confidence, creativity, and enjoyment in all roles, circumstances, and environments (Longworth and Davies 1996).

### 2.3.3 Politics of education

Politics of education is the global, national, and regional dynamics that determines agenda and circumscribes the parameters of education policy debates (Dale 1994).

There is a risk that short-term solutions will be adopted for pre-ordained problems.

The introduction of lifelong learning and holistic development is in the best interest of the people of Hong Kong. Tung (2002) asserted that the goal of the Education Reform is to develop an educational system that encourages holistic development and lifelong learning, enhances students' interest and effectiveness in learning, and nurtures a generation of young people who enjoy learning and have creative thinking, good communication skills, and a strong sense of commitment.

In return, what lifelong learning can Hong Kong harvest? Subtly, behind the action, what are the ulterior motives of the government? According to Sweeting (1997 p. 36), *'both the political and economic forces have contributed to the shaping of education policy in Hong Kong over many years, particularly in relation to thoughts and feelings concerning the future. The interactions between politics and economics have been particularly instrumental in motivating and determining education policies'*.

Lifelong learning is a specific jargon used in all educational policies in the 21<sup>st</sup> century. Thus, people remain sceptical about the real motives behind the Tung administration's determination to promote lifelong learning.

The OECD has institutionalised a new education policy consensus through a genre of disinterested academic descriptions, which are attached to mild exhortations for

change (Henry, Lingard, Rizvi and Taylor 2001).

Levin (1998) likened the spread of similar education policies around the world to a flu epidemic. Many are infected, although the severity varies greatly.

Professor Cheng Kai-ming (2002), a prominent educator in Hong Kong and an influential member of Mr. Tung's think tank on education, acknowledged that it was a visit by an OECD official in 1999 that led to a renewed understanding of the concept of lifelong learning and of a knowledge-based society. The Education Commission adopted lifelong learning as the basic framework of the Education Reform.

Governments in Singapore, Taiwan, Hong Kong, Mainland China, and other Asian societies are becoming increasingly concerned about the role of education in improving the competitiveness of their countries/places in both the regional and global markets. Hence, they are very keen on promoting the idea of lifelong learning and quality education in preparing their youth for a knowledge-based economy (Mok 2000).

In short, it is understandable that Mr. Tung, as the first chief executive of HKSAR—a former British colony—in 1997, faced numerous challenges and envisioned a number

of changes and reform in many areas, including education. A so-called comprehensive education review was then conducted. In 2000, an educational system, which outlined ways towards developing a lifelong learning society, was introduced. The Education Reform seemed to be comprehensive, enhancing citizens' holistic development and advancing Hong Kong's socio-economic development.

Indeed, the Education Reform and lifelong learning are complex matters. Their underlying notions should be thoroughly and critically examined like any piece of knowledge. For example, knowledge is dependent on specific factors in the environment where it is constructed and presented (Fung and Carr 1998). Different discourses construct different versions of the truth from the same texts; hence, which discourses are most powerful and how they frame practice become important issues. According to Foucault (1974) discourse is a set of rules which, at a given period and for a given society define the limits and forms of the sayable. As matters stand, looking more closely into the discourse and policy matters of lifelong learning is necessary.

#### 2.3.4 Lifelong learning and education policy: Critical perspective

In Hong Kong, educational expenditures always top the list. The government invested

HK\$47 billion (1997-98), HK\$52.2 billion (2001-02), HK\$54.8 billion (2002-03), HK\$54.1 billion (2004-05), and HK\$53.9 billion (2005-06) in education (Census and Statistics Department 2004, 2007). Although the government claims that it is committed to investing in education, Hong Kong spent merely about 3.5-4 percent of its gross domestic product on education from 1998-2005, a low figure compared with the world average of 5.1 percent and 4.1 percent among developing countries (Taiwan 7 percent; Singapore 6 percent) (Cheng 1997; Mok and Chan 2002; Census and Statistics Department 2004, 2007).

The intention of the Education Reform and lifelong learning was generally accepted and welcomed in the post-1997 era.

*'Antony Leung who then chaired the Education Commission, was a businessperson and disciple of Kotter. The Hong Kong economy was hard hit by the Asian financial turmoil in 1998. Leung seized the crisis to convince society that Hong Kong's education system could not but change in the 21st century by pointing out that Hong Kong would be faced with challenges owing to globalisation, China's rapid rise and the information technology revolution. Former*

*Chief Executive Tung Chee-hwa was mightily supportive of the education reform drive' (Mingpao Editorial 2006a).*

The impetus for the government to intervene in education has something to do with globalisation and the emergence of a knowledge economy. Hong Kong needs competitive workers who are continuously updated with new knowledge and skills.

The Education Commission (EC) (2000a) stressed that continuing education should be funded on a “user pays principle,” suggesting that lifelong learning is a personal investment from which learners gain individual benefits; hence, learners should pay for themselves. This shows the laissez-faire attitude of the Hong Kong government.

The Hong Kong government is usually taking a noninterventionist stance until some form of crisis management indicates the desirability of action. When it comes to education, policy making in Hong Kong is reactive rather than proactive (Sweeting 1996).

However, educational policies regarding globalisation are only half the story (Kennedy 2004). Hong Kong's post 1997 lifelong learning policies are influenced by local politicians. The government does not plot lifelong learning in advance but advantageously deploy it. For instance, discourses on lifelong learning have been



deployed as instruments to assuage public discontent over high levels of youth unemployment after the Asian financial crisis. The government finds it expedient to deploy lifelong learning discourses as major policy initiatives to demonstrate its performance legitimacy under Mr. Tung's executive-led administration.

Furthermore, Hong Kong, as an international city located along the Chinese border, functions as a bridge between mainland China and the Western world. It connects the Chinese hinterlands to the Western world through an exchange of culture, scientific technology, and education. Hong Kong has to evaluate objectively the strong and weak points both of China and of the Western world to assist educational reform in the Chinese hinterlands (Yixian 1996). Therefore the interactions between politics and economics have been particularly instrumental in motivating and determining education policies (Sweeting 1997).

In 1999, the EC announced that *'the age of Lifelong learning has dawned. Learning is no longer the prerogative of those aged 6 to 22. Lifelong learning is to be the cornerstone of the new education reform, central to its vision, aims, and direction. School education is to lay the foundation for lifelong learning'* (EC 1999b p. 15-17).

Evidently, to promote lifelong learning, EC adopted a two-pronged approach to

reform the existing educational system: initial (school education) and post basic education (adult learning) to learners of all ages and all kinds.

Since the Education Reform started in 2000, the academic structure, curricula, and assessment mechanisms of the educational system have been reviewed. New policies have been promulgated, such as (a) Basic education: New Medium of Instruction (MOI) for Secondary Schools, Secondary School Places Allocation; (b) Higher education: The new Academic Structure for Senior Secondary Education and Higher Education, including the 3, 3, 4 education system (six years secondary education + 4 years university education), liberal studies, career-oriented studies; and (c) Continuing education, including the “user pays principle,” community colleges, expansion in tertiary education (i.e., sub-degrees, associated degrees, and professional diplomas programs), and a qualification framework.

In light of the expectations of the general public, the Education Manpower Bureau (EMB) implemented some key changes, such as departing from the spoon feeding tradition (abolishing the Academic Aptitude Test and promoting “happy learning”) (Mingpao Editorial 2006b). It popularised tertiary education. It launched the associate degree system, and consequently the percentage of young people receiving

post-secondary education sharply rose to above 60 percent. Moreover, it has laid down accreditation systems, allowing employees to earn units and university degrees. Tertiary education is no longer exclusive to members of the elite. The EMB departed from egalitarianism, abolishing the practice of providing universities and schools with funding regardless of their successes and failures. It adopted a “value for money” approach, rewarding the good and punishing the bad by preferentially allocating resources. This resulted in increased competition and widened choice. To promote school diversity, the Direct Subsidy Scheme (DSS) was launched. A DSS school enjoys autonomy, and it may freely enrol students. This promoted professionalism and increased the accountability of principals. Further, the EMB introduced language benchmark tests. Language teachers who want to continue teaching language subjects must pass the language benchmark tests. The reforms also required principals to receive professional training. In addition, the EMB introduced a school-based management bill, under which the sponsoring body of a school should devolve powers to its management committee. The object of the bill was to prevent school managements from being monopolised. These reforms resulted in the restructuring of Hong Kong’s educational system. Hong Kong is prepared for the transition to a knowledge-based economy and for the challenges of globalisation.

According to the Education and Manpower Bureau (EMB) (2009), the EC completed a review on the medium of instruction for secondary schools and for the Secondary School Places Allocation. The EC submitted its report to the government in early December 2005, and the government has accepted all the recommendations advanced by the EC. The Primary One Admission System was reviewed and its continuation was recommended. An interim review of the curriculum reform was also carried out from 2006 to 2007. On 5 May 2008, the EMB (2008) officially launched the Qualifications Framework (QF). By encouraging and promoting lifelong learning, the framework enables individuals to pursue their goals according to their own roadmaps.

With regard to the structure of lifelong learning, the opportunities of learners for learning and the power and autonomy of providers in educational matters have been increased. We not only have a new academic structure but also a QF comparable with the UK National Vocation Qualifications (NVQs). All these reforms definitely help Hong Kong move one step forward to the development of lifelong learning. Thus, we need to source logistic support and to build an infrastructure (hardware and software) to transform Hong Kong into a learning community.

Apparently, educational reforms on lifelong learning are doing well. The direction of the two-pronged approach is comprehensive. However, this study believes that the EMB and the Education Reform are more likely to manage initial and basic education better than post-basic education (i.e., adult education and continuous education). In reforming basic education, we can draw lessons from other countries. Governments in Singapore, Taiwan, Hong Kong, Mainland China, and other Asian societies are very keen on promoting the ideas of lifelong learning and quality education in preparing their youth for a knowledge-based economy (Mok 2000).

This study is interested in adult and continuous education in relation to the Education Reform. On one hand, continuing education, recast as “lifelong learning,” is the cornerstone of the post–handover education reform agenda (Education Commission 2000b). On the other hand, educators have been criticizing the adult education policy of Hong Kong as poorly founded. Hong Kong does not have a planned system of adult education (Boshier 1997). One manifestation of the “hands-off” attitude of the government is its marked reluctance to regulate or to otherwise discipline the most predatory or rapacious foreign educators in Hong Kong.

In Hong Kong, adult education is yet to become a part of government policy. There is

no government department that particularly looks after adult education, and there are neither policies nor plans about adult education. The government is passive about the development of adult education (Cheng 1997). Adult education in Hong Kong is therefore largely driven by market forces. Meanwhile, lifelong education as a framework for educational development is still not an issue in Hong Kong.

The term “adult education,” which is often assumed to be included in or superseded by lifelong learning, had a much broader definition in the report of the UNESCO general conference in 1976 compared with “lifelong learning” in the 1990s (Hodgson 2000).

According to the UNESCO (1976), “adult education” denotes the entire body of organised educational processes regardless of the content, level, and method—formal or otherwise. It also includes apprenticeship and replacement of initial education in schools, colleges, and universities. Through adult education, persons regarded as adults by the society develop their abilities, enrich their knowledge, improve their technical or professional qualifications, and bring about changes in their attitudes or behavior in the two-fold perspective of full personal development and participation in balanced and independent social, economic, and cultural development.

The UNESCO adopted a broad view of adult education similar to lifelong learning. The UNESCO's definition of adult education as learning activities for adults has "no theoretical boundaries" (Mok 1997a). However, in practice, adult education is always framed by various boundaries, such as content, level, methods, ideology, access criteria, and policy. The government has allowed the boundaries of adult education to be regulated by markets or by more powerful adult education providers. According to Boshier (1997 p. 120), *'Compared to adult education in the West, that in Hong Kong is less participatory, more teacher centred and more focused on vocational considerations. Much of it is informed by an ideology of training and the participants are usually motivated by pragmatic instrumental considerations'*. Therefore, while the Education Reform is inevitable, remarks about the shortfalls of lifelong learning policies are worth examining.

The development of post secondary education is very recent. For decades, the percentage of the age group, which had access to degree-awarding higher education, used to be only 2 percent (Postiglione 1996; and Cheng 1997). In 1978, Hong Kong entered into an ongoing debate on the expansion of tertiary education involving the rise of credentialism and the high cost of tertiary education. In the late 1980s,

enrolment increased to about 6 percent of the age group, and it tripled to 18 percent in 1994. According to the Census and Statistics Department (2004, 2007), people aged 15 and over who are pursuing degree courses increased from 10.4 percent in 1998 to 15.8 percent in 2006.

An expansion of the higher education system is important for several reasons. Conceivably, education serves the best interest of the society at all times. A better educated and more highly skilled population will be able to deal more effectively with change (Dawkins 1987). A major function of education is, after all, to increase the capacity to learn of individuals, to provide them with a framework with which to analyze problems, and to increase their capacity to deal with new information. At the same time, education facilitates adaptability, making it easier for individuals to learn skills related to their intended profession and improving their ability to learn while pursuing their professions.

In view of the enormous and rapid changes in the 21<sup>st</sup> century knowledge-based society, lifelong learning should be more critical and aware of discourses on forthcoming changes. State power is exercised through discourses that the government deploy in relation to education, economy, and welfare, as well as through



the armed forces and institutions of the state (Kennedy 2004). How is a particular lifelong learning discourse deployed in the political context of Hong Kong and for what purposes? Further, the state is correct in shaping its educational objectives in this way (Ho et al 2005). Many citizens would no doubt wish to see their children develop a critical self-awareness of the political, social, and economic issues affecting their lives and which may lead them to question whether the state, more particularly its government, is always moving in the right direction.

A simple definition of policy analysis is '*the study of what governments do, why, and with what effect*' (Taylor et al 1997 p. 35). If one views policy documents as texts instead of technical blueprints, then what is not put on the public agenda is worth a serious discussion (Ball 1994). At first glance, the contents of the Education Reform, which was based on lifelong learning initiatives, were apparently filled with good intentions. However, little has been discussed about the hidden agenda, hurdles, and dilemma behind the institutionalisation of lifelong learning. This is one of the reasons why this study is pursued.

In post-handover Hong Kong, the same objectives of socialisation and supplying the economy with its manpower needs are less bluntly stated than they were during

colonial times (Ho et al 2005).

A review of the literature on participation has become one of the guiding features of the discourse on adult education (Mok 1997b). However, in the Education Reform, it is most regrettable that words such as equality, rights, democracy, education for all, and educational opportunity are completely missing (Mok and Chan 2002). A learning society is closely related to the intention to strengthen the global competence and competitiveness of its citizens.

While the Hong Kong government invests in lifelong learning, evidently, there are controversial views about whether lifelong learning itself should be measured as an outcome. Recent reform proposals have been at the wake of managerialism, which is an orientation or a philosophy characterised by economic rationality, strategic management, controlling performance and continuous evaluation, emphasis on competition and control, recognition and encouragement of consumerism, and reduction of government involvement in public services (Mok et al. 1998). Behind the paradigm of New Public Management is a prevailing ideology of economic rationalism—the adoption of private corporate management practices in the running of the public sector and in restructuring the state in terms of social policies and public services.

The current education reform on lifelong learning is put into two contrasting perspectives: learning for performance and learning for understanding (Chan 2001). Thus, in promoting lifelong learning and learning to learn, students should not only learn what to do and how to do it but also how to continue doing it variably or differently.

The Education Reform has imperfections (Ho et al 2005). Policies are first concerned about the quality versus equality dilemma, which is recurrent in both public and education policies. Educational reforms in Hong Kong over the past decades can be viewed as a response to the previous era of quantitative expansion. However, with an overriding concern for quality improvement merged with the ideology of marketisation and managerialism, scant or little attention has been devoted to the issue of quality. Second, education is a collective effort requiring collaboration among different partners. However, when implementing educational reforms, the government's emphasis is on competition at the expense of cooperation.

#### 2.4 Open and distance learning and the Open University of Hong Kong

According to the UNESCO (2002 p. 8), '*Open and Distance Education represent*

*approaches that focus on opening access to education and training provision, freeing learners from the constraints of time and place, and offering flexible learning opportunities to individuals and groups of learners. The term Open and Distance Learning reflects both the fact that all or most of the teaching is conducted by someone removed in time and space from the learner, and that the mission aims to include greater dimensions of openness and flexibility, whether in terms of access, curriculum or other elements of structure’.*

Distance and open learning are not interchangeable terms, although both are philosophically contentious. By distance learning we refer to a mode of delivery of learning in terms of physical structure and organisation of the course, with less face-to-face teacher contact and more responsibility of learning on learners than conventional education. On the other hand, open learning relates to access to learning, which helps enhance equity, participation, and democratic education.

Distance learning is often confused with open learning (Holford, Gardner, and Ng 1995). The confusion springs from many distance learning organisations, such as Hong Kong Open Learning Institute (now OUHK) and the British Open University (UKOU), which are called “open” and operate with open entry policies. However,

distance and open learning are not synonymous (Kember 2007). The success of UKOU's model and the use of distance education mode to meet the demand of open entry programs make open learning and distance education become synonymous.

Open education programs are not always conducted at a distance; many distance education programs do not practice open entry (Holford et al. 1995). A distance learning course involves the following features: teacher and learner are separated; various technical media are used; courses are offered to a large number of students at the same time over a large area; organised self-study; and students take responsibility for their own learning. Distance education *'is most simply defined by the degree of separation between the teacher and the students. In most cases there is also separation between learners for most of the time'* Kember (2007 p. 10). In distance education, there are few (sometimes, none) classes that one has to attend to personally. Instead, students work through packages and assignments at their convenient time.

Open learning means that the learner has choices (Race 1989). He/she has the freedom to manoeuvre. Open learners can choose where, when, and how to learn. The learner has more control. There is not as much control imposed by lecturers, instructors, or teachers as in conventional training and education. Moreover, open

learning should provide learners the freedom of learning, not only freedom of access but also freedom in the form and contents of study. Open learning also assumes heterogeneity among participants (Dhanarajan 1999), requiring more than a provision for flexibility.

Institutions that proclaim to be “open” still continue to select their enrollees. To commit to open access genuinely, institutions must attempt to identify the academic needs of learners first before designing courses rather than starting with courses and looking for students to fit them. Open learning has a number of facets of openness: *‘open entry; study anywhere; freedom to study at a time chosen by the student within a specified semester, a high degree of openness over the choice of courses to make up a degree program’* (Kember 2007 p. 9).

In addition, open learning is not regarded as the mainstream in education. In fact, a stigma is attached to it, as it is viewed as education for the second best (those who are not accepted in universities) (Boshier and Pratt 1977). Cost-effectiveness is one of the factors that the government considers in deciding whether or not to set up an open university (Chan 2001). Further, the EC (2000a) viewed the offering of “open education” as merely “extramural studies.” Unlike the other five tertiary institutions in

Hong Kong, OUHK is not under the umbrella of the University and Polytechnic Grants Committee (UPGC).

Distance and open learning modes help promote the development of lifelong learning.

Open and distance learning typically attempt to open education to students wherever they may be located, and they try to increase access to education by removing unnecessary barriers (Melton 2002).

For employers, distance and open learning modes offer high quality and usually cost-effective professional development in the workplace (UNESCO 2002). They allow the upgrading of skills, enhancement of productivity, and development of new learning cultures. They also mean the sharing of costs of training time and increased flexibility of training. For governments, the main potential is to increase the capacity and cost-effectiveness of education and training systems, to reach target groups with limited access to conventional education and training, to support and enhance the quality and relevance of existing educational structures, to ensure the connection of educational institutions and curricula to the emerging networks and information resources, and to promote innovation and opportunities for lifelong learning.

UKOU has attempted to respond positively to the needs of lifelong learning by

welcoming students of all ages and by offering them a wide range of courses to meet their perceived needs (Melton 2002). Indeed, the main criticism of open and distance learning is its hidden agenda of cutting costs. Some (e.g., Clark 1995) criticise the use of open and distance learning as merely as a cost-cutting measure. Nevertheless, the rationale for adopting distance education is cost-effectiveness (Kember 2007).

The idea of lifelong learning was not acknowledged by the Hong Kong Government until the 1970s, and the creation of the Open Learning Institute (OLI) was a milestone in lifelong learning infrastructure. However, the government continues to play a limited role in the promotion of formal lifelong learning (Cheng 1997).

The OLI is government-supported but is self-financing in its day-to-day operations. It provides degree-awarding learning. Overseas institutions also offer “offshore” distance-learning programs for Hong Kong students. The continuing education components of formal institutions of higher education also play an essential role in Hong Kong’s adult education. The OLI has a student population of around 20,000. Considering all the degree and non-degree provisions, as planned by the government, and the overseas studies and open learning opportunities, Hong Kong achieved at least 35 percent of its age group receiving higher education in the mid-1990s. This is



by no means a modest rate of enrolment, even when compared with that of many other industrialised countries (Cheng 1997).

The Hong Kong Government established the OUHK, formerly the OLI, in 1989. It has a unique mission of providing a second chance for those who had to forego or were denied education in early years, or whose requirements for further education developed relatively late in life. The OUHK strives to be a leader among universities providing learning opportunities by open and distance education, and to excel as a provider of higher education in general. The OUHK uses a flexible credit system under which students earn credits for each course and accumulate credits towards a degree. It offers great freedom for its students in terms of where and when to study, and it provides them with carefully structured materials that serve as guides through the courses (OUHK 2005a). Obviously, the OUHK's curriculum (teaching and learning) is organised around distance learning. The OUHK also offers "open" access (limited/no entry criteria) and allows autonomy and choice of learning.

It is so-called an "Open University" of Hong Kong. The OUHK's motto is "Education for All." However, it is confusing to note that the OUHK stresses on the structure of its courses—its distance learning mode, which allows flexibility and suit the learning pace of individual learners—rather than open access to attract potential learners.

According to the registrar of the OUHK, the distance-learning work of the OUHK is much better recognised overseas than at home. Other countries want to visit to see how the OUHK's distance learning mode works and operates on a self-financing basis (Armour 2005). According to Kember (2001 p. 66), *'OUHK, its mission statement containing both elements of open access and distance education, has modelled itself along the lines of an independent open university and followed the common assumption of these bodies that distance education is synonymous with open entry'*. Hence, the open admission criteria of OUHK may increase the numbers of lifelong learners in Hong Kong.

For the student/learner, open and distance learning means increased access and flexibility, as well as the combination of work and education. It may also mean a more learner-centred approach, enrichment, higher quality, and new ways of interaction (UNESCO 2002). Most institutions involved in open and distance learning place considerable emphasis on the importance of responding to student needs as "a student-cantered" or "learner-cantered" approach (Melton 2002).

Learners have to study independently and have to be self-directed; hence, self-concept in studying is important. In a study among distance learning students at Payame Noor

University, Iran, it was found that successful students are those who possess a positive self-concept, while the unsuccessful ones are those with lower self-perception (Hormozi 1998). This suggests that academicians, counsellors, and tutors can play a significant role in empowering, building self-confidence, and boosting the morale of distance learners.

To meet the growing demands for vocational studies and associate degrees, as well as to face competition from other institutes providing similar courses apart from offering distance and open learning programs, the OUHK is expanding its campus and providing more face-to-face full time courses. Through a message from the President, the OUHK (Leong 2004) outlined recent developments in education, such as a growing interest in vocational subjects, an explosion of associate degree places and institutions, and the proposed change of the education system in Hong Kong to a 3+3+4 pattern, which call for an overall review of degree education opportunities in Hong Kong. In response, Mr Leong added that universities and other degree-granting institutions will have to set up such courses and programs to satisfy the needs of students. There should be more rational planning for role differentiation, encompassing all local degree-granting institutions in Hong Kong. A case can be made for many of these subject areas by non-University Grants Committee UGC

institutions, such as OUHK.

The OUHK's mission is to provide high quality and flexible educational opportunities for adults. Currently, the University offers more than 100 postgraduate, degree, and associate degree courses. Since its inception in 1989, the University has continuously strived to offer degree and sub-degree programs (OUHK 2005b). The OUHK is changing and developing its full-time degree programs. To date, about 30,000 students have graduated. There are currently over 17,000 students pursuing distance-learning programs. As the University has expanded, it now offers face-to-face mode of learning on a full-time basis to 1,300 students. The OUHK is aiming at becoming Hong Kong's "dual mode" institution (Armour 2005). However, the government is not content to leave the provision of open entry programs in the hands of the OUHK (Kember 2007). There is a major expansion of community colleges in Hong Kong, which offer associate degrees to students who completed Form 7, and the courses are taught face-to-face. With increasing learning alternatives, distance education enrolments have dropped. To survive, the OUHK has started its own community college with face-to-face teaching. The OUHK (2008) is trying a dual-mode system that offers face-to-face and distance teaching of the same course.

The average age of face-to-face students is young (around the age of 22); 47 percent of them are at Form 7 education level.

According to Professor Oblugbemiro Jegede (2001), Chair Professor and Director of the Centre for Research in Distance and Adult Learning at the OUHK, the University has successfully operated as a quality higher educational institution on a self-financing basis since 1993. It established and gained the public acceptance of open and distance learning (ODL) in Hong Kong. With the increasing demands for continuing education, he predicts that the open and distance modes will soon move to the mainstream. The educational scene will see the emergence of community colleges and private universities, more flexible programs with multiple entries and multiple exits, wider implementation of a credit-unit system, and more Web-based programs. When community colleges are established, the scope of students under ODL will considerably be expanded. The foundation of lifelong learning in Hong Kong will solidly be laid. As such, this study is also interested in inquiring into the reasons why OUHK learners choose the OUHK and in exploring their learning practices at the OUHK.

## 2.5 Other Studies on Lifelong Learning

On the whole, empirical data on lifelong learning are scanty, what more in Hong Kong. Many statements about learning society are ideological rather than empirical, and claims are rhetorical rather than factual (Jarvis 1997). Lifelong learning is a topic most often addressed by both policy makers and academicians using rhetorical and normative critique rather than empirical evidence and systematic analysis (Gorard and Rees 2002).

In the competitive environment, knowledge is power. The number of participants in continuing education courses has been increasing. The market offering accredited courses at the sub-degree, degree, and post-graduate levels, as well as at the professional level, is huge and growing. The competition among institutes is intensifying. In recent years, adult education has been pushed into a more market-oriented situation (Tett 2002). It has come to be viewed as a commodity like any other that can be marketed by the use of attractive presentation, effective publicity, market research, and product evaluation. In Hong Kong, lifelong learning is market driven.

In a study of a random group of 325 Hong Kong adult learners, the participants showed the following characteristics: gender (55% females, 45% males); age (51%

about 20-34 years old); civil status (6% married, 87% with children); education (75% secondary school, 17% post secondary/non-degree, 7% degree or above); and employment [1/3 (unemployed, housewives, students, retired people) and others, 22% blue-collar, 23% white collar professional, 22% executives] (Chan and Holford 1994). This study indicated that young, single, working males and females at their late 20s with secondary education are more likely to pursue continuous education.

Another study showed similar results. The study found that there were 3,998 students enrolled in the continuing education units of the Higher Education Institutes and Open Learning Institutes, among them 59% were females, 62% were below the age of 30, and 69% were single. The dominant group was involved in finance, insurance, real estate, business services, community, social and personal services, and others (e.g., manufacturing, construction, wholesale/retail, restaurant/hotel, and import/export) (Chung et al. 1994).

The SPACE 2001 survey with 1,140 respondents who were 18 years old or above and who were enrolled in continuing education in Hong Kong indicated that people with more income and more maturity are eager to participate in lifelong learning. The following figures characterised the survey respondents: gender (44.6% males,

55.4%, females); age (11.3% 20-24 years old, 10.8% 25-29 years old, 12.5% 30-34 years old, 15.4% 35-39 years old); education (74% secondary school, 6.2% tertiary/sub-degree, 18.2% degree or above); and income (23.5% with \$12, 000-17, 999, 27.5% with \$7,000- 11, 999, 30.7% with \$18,000 or above).

We learned from a number of quantitative surveys on participation in lifelong learning that females, those in their mid- or late 30s and those coming from low- and middle-class backgrounds, participate in lifelong learning to obtain higher or professional qualifications. People with higher educational and occupational levels are more likely to participate in education and training. People are ready to make financial contributions if they judge the benefit to be an exclusively personal one. In general, money represents a major obstacle in learning. Some people would pay nothing at any circumstances (European Report 2003).

Given these previous studies, an in-depth qualitative study may be useful in examining motivations behind participation in lifelong learning. This study is interested about the experiences on lifelong learning pursued through self-directed and distance learning—the peculiar features of the OUHK. In the UK, 10 percent of adults are currently engaged in studying and a further 16 percent studied in the



previous three years. In addition, 10 percent of adults are more consciously undertaking self-directed learning (Sargant 1991). It seems that the OUHK plays a significant role in lifelong learning. However, the question is, to what extent?(1.7.2 subsidiary question g)

Lifelong learning has diverse meanings and purposes. This study explores what lifelong learning is in the context of Hong Kong by looking at how people practice lifelong learning through a group of part-time adults studying at the OUHK, which is promoting the culture of learning without boundaries through its distance and open learning mode.

This study aims a) to understand the nature, extent, and patterns of the experiences and opportunities of OUHK learners as adult/lifelong learners; b) to explore their strategies in engaging and pursuing lifelong learning at the OUHK; c) to understand the role of distance and open learning in lifelong learning; and d) to explore a framework of learning in relation to the current policy on lifelong learning.

### Conclusion

This section explored the different ideas on lifelong learning and stressed that learning

lies at the heart of the conceptual framework of lifelong learning. The Education Reform was summarised and reviewed. The strategic role of the government and lifelong learning infrastructure are important in promoting and sustaining lifelong learning. A study of a group of OUHK lifelong learners may help explore the future direction of lifelong learning in Hong Kong.

## Chapter Three: Methodology

### Introduction

Lifelong learning is a very confusing term. For this study, lifelong education is assumed to be about adult education, continuous education, education and training, recurrent education, further and higher education, formal and non-formal education, informal learning, and so on. Functionally, lifelong education serves for either economic or individual gains. Although lifelong learning is defined broadly as a set of beliefs, aims, and strategies, it is centrally concerned about the availability of learning opportunities throughout one's lifetime (Tuijnman 2002b).

For too long, lifelong learning was an evidence-free zone—under-researched, under-theorised, unencumbered by doubt, and unremoved by criticism (Coffield 2000b). Expectedly, research on lifelong learning is scant.

This chapter recapitulates the aims and research questions of the study; discusses the appropriateness of using a qualitative case study as the primary research design; outlines the background information of the OUHK and its learners; explains various methods in organizing, collecting, and analyzing data; and addresses ethical considerations.

### 3.1 Research Methodology

Methodology is the strategy, plan of action, process, or design behind the choice and use of particular methods. It links the choice and use of methods to the desired outcomes (Crolty 1998).

Given that lifelong learning is about learning throughout one's lifetime, this study is interested in people's voices and experiences in their lifelong learning journey. In particular, it is interested in the experiences of a number of OUHK adult learners. From a qualitative perspective, it investigates lifelong learning both as a practice and as an ideology. A qualitative approach is required for a research problem involving people's constructions of meanings, which have not been previously explored (Hassard 1990). Qualitative researchers seek insights rather than statistical perceptions of the world (Bell 2005). The choice of qualitative approach in this study was not based on philosophical orientations and disciplines but on the nature of the research problems.

In qualitative studies, research questions are typically oriented to cases or phenomena, seeking patterns of unanticipated and expected relationships (Stake 1995). This study primarily aims to examine patterns or relationships that foster and sustain lifelong

learning, particularly in the context of OUHK learners. Hence, a case study design was chosen. Case studies, the building blocks of research design, are qualitative in nature, and they emphasise description and interpretation within a bounded context (Merriam 1988a).

Qualitative inquiry is inductive, focusing on processes. Case studies emphasise description and interpretation within a bounded context (Merriam 1988b). They primarily aim at describing certain phenomena (i.e., exploratory study) (Bouma and Atkinson 1995). Based on the life experiences of OUHK learners, this exploratory study seeks to: (a) understand the nature, extent, and patterns of the experiences and opportunities of OUHK learners as adult/lifelong learners; (b) explore their strategies in engaging and pursuing lifelong learning at the OUHK; c) understand the role of distance and open learning in lifelong learning; and d) explore a framework of learning in relation to the current policy on lifelong learning. This study examines and explores data from the life experiences of OUHK learners in the present context. Hence, this is an “intrinsic case study” (Stake 1995) or a “descriptive case study” (Yin 1994).

It must be noted that there are several confusing definitions about case studies. While a case study may be defined in terms of the research process (Yin 1994), it may also be viewed as an end product rather than a strategy or method (Merriam 1998a). For this academic thesis on lifelong learning, a case study was chosen because it is both a process and a product of learning.

### 3.2 Case and Sampling

#### 3.2.1 A case

*‘What is a case? A case may be theoretical or empirical or both, it may be a relatively bounded object or a process; and it may be generic and universal or specific in some way’*

(Ragin and Becker 1992 p. 3).

Usually, the cases of interest in education and social services are people and programs.

In many ways, each one is similar to and distinct from other persons and programs (Stake 1995).

This study was oriented towards OUHK learners’ learning experiences and practices in their study for higher diplomas/bachelor’s and master’s degrees through the

distance learning mode. This case study, which is within the bounded system of the OUHK and its learners (2004-2005), collects theoretical and empirical data on lifelong learning, and examines their commonalities and differences.

Since 1998, the researcher has been teaching in the School of Education and Languages and in the School of Science Technology as a part-time tutor at the OUHK.

The duties of a tutor are to hold face-to-face tutorials and to mark assignments and examination scripts for a group of about 20-30 students of certain subjects or modules.

Course modules usually last for two semesters (from April-April or October-October).

The OUHK, formerly the OLI, is the first and only university in Hong Kong using a flexible credit earning system and offering open and distance education (OUHK 2005a). This study treats the OUHK as a bounded system. Evidently, the OUHK plays a significant role in promoting lifelong learning by currently providing more than 100 postgraduate, associate, and sub-degree programs. Since 1989, more than 150,000 students have studied at the OUHK (OUHK 2005a).

OUHK learners are self-directed and motivated. Under the flexible credit system, students earn credits for each course and accumulate credits towards a degree (OUHK

2005a). The OUHK offers great freedom to its students in terms of where and when to study, and provides them with carefully structured materials that serve as guides through the courses. Trained tutors who hold tutorial sessions, comment on and mark assignments, and answer student queries by phone and correspondence are also available.

### 3.2.2 Sampling

Qualitative samples do not attempt to be statically representative; however, this does not mean that sampling in qualitative research proceeds without any guidance. A sample aims to identify cases that provide full and sophisticated understanding of all aspects of the studied phenomenon (Rice and Ezzy 1999).

In a case study, a variable or a set of variables is measured in one group (or an individual) at one point in time; a single case is studied for a period of time; and the results are then recorded (Bouma and Atkinson 1995). An educational case study is considered an empirical inquiry within a localised boundary of space and time. It deals with the interesting aspects of a case in its natural context within an ethic of respect for persons in order to inform (Bassegy 1999).



The OUHK and its learners are the objects of this study. A case study may be of one person, one group, one family, one classroom, one town, or one nation (Bouma and Atkinson 1995). Thus, the target population was confined to a number of adult lifelong learners who, then and there, were studying at the OUHK.

The more the specific, unique, system-bounded the object of study, the greater is the usefulness of the epistemological rationale (Stake 2000). Qualitative researchers judge the adequacy of a sample for a given study based on how comprehensively and completely the research questions are answered (Russell and Gregory 2003). When the researcher is satisfied that data are rich enough and that they sufficiently cover the dimensions the researcher is interested in, then the sample is large enough (Rice and Ezzy 1999). The informants of this study were composed of three groups: (i) OUHK learners studying under the Master's of Education program (subject E814) (Appendix A); (ii) OUHK learners studying under the Bachelor of Nursing program (subject NU305) (Appendix B); their respective course coordinators (C.C) Mr. X and Mr. Y; and (iv) the author.

To gain access to representative data, two groups of OUHK learners (course E814 and NU305) whom the researcher taught were invited to participate in the study on a

voluntary basis. Permission was obtained from both course coordinators (for E814 and NU305). In this descriptive and exploratory study, theoretical sampling, which is the selection of participants according to theoretical grounds derived from the analysis of cases (Morse and Richards 2002), was not considered. Instead, purposive sampling (i.e., the use of information-rich cases for an in-depth study to examine meanings and interpretations, processes, and theories) and convenience sampling (i.e., the least desirable form of sampling in qualitative research where participants are selected based on the ease of access to the researcher and on their knowledge of the subject matter) (Rice and Ezzy 1999; Russell and Gregory 2003) were employed. Purposive samples in this study referred to any E814 and NU305 subject. Convenient samples were those who regularly attended at least two to three tutorial sessions and who were invited for individual interviews.

Lifelong learners were the key objects of the study; hence, as both purposive and opportunity samples, OUHK learners (whom the researcher taught) were significant subjects of the study. Course members of E814 were the key targets of the study. All were graduates studying for a higher degree, and they studied “Supporting Lifelong Learning.” They were also working adults (e.g., teachers and trainers in related disciplines). Course members of NU305 continued their learning at the Bachelor’s

level after two years of part-time study at the OUHK; a conversion Diploma Course in Nursing proffers valuable information about their beliefs and practices on lifelong learning. This study is interested both in the differences and in the commonalities of the learning experiences of respondents, seeking to understand them (Stake 1995).

The inclusion of data generated from the course coordinators (two administrators who both had recently completed their Ph.D.s) and from the researcher (a tutor and an experienced distance learner) also brought additional advantages in putting different perspectives together to understand better the views, practices, and implications of lifelong learning for adult learners using the open and distance learning mode.

### 3.3 Methods of the Study

Methods are the techniques or procedures used to gather and analyze data related to some research questions or hypothesis (Crolty 1998).

A number of subsidiary questions need to be examined through different strategies:

- a) What does lifelong learning mean to OUHK learners?
- b) What motivates students to engage in lifelong learning?
- c) What deters students from engaging in lifelong learning?

- d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?
- e) Is it essential to develop the ability for reflection and critical thinking in lifelong learning?
- f) Why do people choose the distance learning mode?
- g) To what extent is the OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?
- h) In what ways should the Hong Kong Government influence the development of lifelong learning?

### 3.3.1 Data collection

In case studies, methods are not defined (Simon 1980). Case studies do not claim any particular method for data collection and data analysis (Merriam 1998 b). As stated by Bassegy, (1999 p. 81) '*Work out your own methods – from a clear ethical standpoint and based on your research questions*'.

In this study, various strategies were employed to provide rich and unique views on lifelong learning practices and experiences. The use of different procedures helps

reduce the likelihood of misinterpretations and faulty explanations. In qualitative studies, these procedures are generally called triangulation. Researchers triangulate differently based on the nature of available data (Stake 2000).

To examine the different aspects of the practices of lifelong learning in terms of why what, when, where and how, this study used three major quantitative and qualitative data collection methods, namely, asking questions, observing events, and reading documents (Bassegy 1999).

a) E814 course members (2005 April intake) from the School of Education and Languages (E & L)

i) Eight one-hour, semi-structured individual interviews were organised (August-November 2005) to review the detailed life histories of the respondents in relation to lifelong learning, including what they did in the past and what they would do in the future ( see interview guide, Appendix E). The interviews were tape-recorded and were transcribed in verbatim. In the interviews, some respondents were pleased to contribute, while others were frightened or irritated (because of the length of the interviews). Some did not think deeply about the issue, and some only constructed their positions during the interviews. Answers were likely to have been

influenced by the view of the researcher (Bassey 1999).

ii) Case studies are particularistic. In-depth descriptions of phenomena and heuristics are needed to illuminate the reader's understanding of the studied phenomena (Merriam 1988a). Other than listening to the interviews, data on how interviewees and other course members managed their lifelong learning study were collected and reviewed (April 2004-January 2005) through course work activities: e-mail exchanges, reflective journals, and TMA I. At the OUHK, there are trained tutors who hold tutorial sessions, comment on and mark assignments, and answer student queries by phone and correspondence (OUHK 2005a). E-mail exchanges and reflective journals indicate the first hand experiences of OUHK learners. For instance, they reflect learning difficulties, learning approaches, and ways of sustaining learning. Complementary data from TMA 1, which contains self-reported information about learners' lifelong learning journey, also enriched the research data.

iii) Course evaluation. Pre and post course surveys were conducted with E814 students (2004-05 intake) at the beginning and at the end of the course, respectively, to examine the changes in their views on lifelong learning before, during, and after the course. The surveys indicated potential and possible future changes in lifelong

learning practices.

- b) E814 (2005-06 intake) and NU305 (2004-05 intake) from the School of Education and Languages (E & L) and the School of Science and Technology, respectively

Case studies focus on holistic description and explanation (Merriam 1998b). Data on the lifelong learning experiences of OUHK learners were enlarged by group interviews with OUHK learners enrolled in E814 (2005-06 intake) and NU305 (2004-05 intake). Six semi-structured group interviews (one for E814, five for NU305) were conducted. Each group was composed of two to five persons, with each interview lasting for one hour. Group discussions and guided group interviews take many forms, including unguided conversations, formal meeting interactions, social gatherings, and multiple-respondents interviews (Morse and Richards 2002). Through group interviews, participants interact with each other, and they become willing to listen to all views, perhaps reaching a consensus about some aspects of the topic (Bell 2005).

- c) Course coordinators Mr. X (E814) and Mr. Y (NU305)

One-hour semi-structured individual interviews with course coordinators Mr. X (E814) and Mr. Y (NU305) were conducted to solicit their experiences and views on lifelong

learning and lifelong learners at the OUHK.

d) The researcher as a part-time tutor and a distance learner

The researcher is an experienced learner (outsider) and tutor (insider) in lifelong and distant learning. The reflections and analysis of the personal experiences of the researcher were used as supplementary data to depict a holistic picture of lifelong learning through open and distance learning mode. There are two approaches in incorporating researcher experience in a study: separate it from that of the others in the study and introduce and use it as data (Morse and Richards 2002). In this study, the researcher's experiences were used to enrich data, similar to the second-hand experiences of interviewees.

In so doing, the researcher noted and agreed that in educational research, there is a major preoccupation with the status of "self" – both as the subject of the research and as the author of the research (CARE 1994). Research methods must allow both for individual experiences, which is the narrative form of the writer, and for a dialectic between the interpretation of experience and the re-examination of theories on social life (Griffiths 1994). In this regard, the lifelong learning and teaching experiences of the author as a researcher, learner, and tutor were critically examined.



### 3.3.2 Data analysis

In discussing qualitative data analysis, the analytic method is of paramount importance (Russell and Gregory 2003). Case studies do not claim any particular method for data collection and data analysis (Merriam 1998b).

There are procedures that researchers can use to interpret and organise data, such as conceptualizing and reducing data, elaborating categories in terms of their properties and dimensions, and relating through a series of propositional statements (Strauss and Corbin 1988). There are four forms of data analysis and interpretation in case study research: categorical aggression, direct interpretation, looking for patterns, and naturalistic generalisation. Categorical aggression seeks a collection of instances from the data and expects the emergence of issue-relevant meanings. Direct interpretation looks at a single instance and draws meaning from it without looking for multiple instances. It is a process of breaking data and putting them back together in more meaningful ways. Patterns enable researchers to examine relationships between two or more categories. Finally, naturalistic generalisations are developed from analyzing the data, allowing people to learn from the case either for themselves or for applying it to population cases (Stake 1995).

In this study, raw data from interview transcripts/notes, course work activities, and course evaluations were transformed through an interpretive process within the context of the collected data (Morse and Richards 2002). The following analytic procedure was adopted: (1) organizing data; (2) generating categories, themes and patterns; (3) testing emergent hypotheses against the data; and (4) searching for alternative explanations of the data (Marshall and Rossman 1995).

Analysis is the interplay between researchers and data (Strauss and Corbin 1998). In case studies, the researcher is the primary instrument for data collection and analysis, and data are mediated through this human instrument (Merriam 1988a). During the process of analysis, researchers should monitor and account for the ways by which their values, beliefs, culture, and even their physical limitations could affect the process and quality of data (Morse and Richards 2002). In this study, the researcher maintained reflexivity during the analysis. Reflexivity mandates the writer to be conscious of his/her biases, values, and experiences that are brought to a qualitative research study (Creswell 1998). Reflexive research acknowledges that the researcher is part and parcel of the setting, context, and culture being understood and analyzed (Rice and Ezzy 1999).

Case studies are generally faulty due to its lack of representativeness (Hamel 1993).

However, we must be reminded that *'the purpose of case study was not to represent the world but to represent the case. Criteria for conducting the kind of research that leaded to valid generalization needed modification to fit the search for effective particularization'* (Stake 2000 p. 245).

Critics of the case approach question the value of the study of single events and argue that it is difficult for researchers to cross-check information derived from case studies.

Others are concerned about the possibility of selective reporting and the resulting dangers of distortion (Bell 2005). However, the persuasiveness of the findings can be strengthened by showing that information obtained form various sources in various ways (triangulation) can converge (Ashworth 1996).

In this study, a variety of data collection methods was used, thereby ensuring research validity. This multi-method approach is known as triangulation (Bell 2005 p. 116).

Triangulation is the combination of two or more theories, data sources, methods, or investigators in the study of a single phenomenon (Shih 1998). However, the term "triangulation" should be used with caution. One does not conduct triangulation simply by interpreting the same data using different theories or by gathering a

multidisciplinary team of investigators or coders (Morse and Richards 2002).

In a case study, respondents play the major roles of directing and acting. In a process called “member checking,” respondents are requested to examine rough drafts where their actions or words are featured (Stake 1995). Although not sufficient, it is important for targeted respondents to receive drafts of how they were presented, quoted, or interpreted, and for the researcher to listen well for calls of concern (Stake 2000). In this study, the respondents were invited and encouraged to give feedback on drafts containing their ideas.

*‘The iterations among data collection and data interpretation continued until the analysis was well developed and further observations had yielded redundant, minimal or no new information to further challenge or elaborate the conceptual framework or in-depth descriptions of the phenomenon, this point was called saturation or informational redundancy’ (Russell and Gregory 2003 p. 37).*

In this study, a comprehensive sample of OUHK learners, course coordinators, and tutors taken as a bound system was sought. Lifelong learning experiences are unique;

hence, data were deemed saturated when different views and practices on lifelong learning were solicited to the extent that patterns of differences and commonalities loomed.

In addition, in this study, learners (E814) who studied “Lifelong Learning” were compared with those who did not (NU305). Case studies need not be purely descriptive; it need not be limited to the micro-level; and it need not ignore comparative analysis (Crossley and Vulliamy 1984). The boundedness and behaviour patterns of systems are the key factors in understanding cases. Ultimately, we may be more interested in a phenomenon or a population of cases than in individual cases. Indeed, we cannot understand a particular case without knowing about other cases. For a while, we probably will not compare cases. We can simultaneously carry out more than one case study, which is a concentrated inquiry into a single case. When there are multiple cases of intrinsic interest, comparing them becomes useful (Stake 2000).

### 3.4 Ethical considerations

In this non-experimental case study design, OUHK learners and course coordinators were invited for interviews, course evaluations, and course work activities.

Interviewees were informed about the nature and content of the interviews. They were not involved without their knowledge and consent. They were also not coerced to participate (Wellington 1996).

Respondents were fully informed about the nature and purpose of the research. They were given due respect; they were neither induced to commit acts that would diminish their self-esteem nor were they exposed to physical or mental stress. They were the owners of the data (Wellington 1996; Bassey 1999)

All respondent information was treated with the strictest confidentiality, and their privacy was protected. Moreover, interviewees were given the opportunity to verify their statements (Wellington 1996; Bell 2005).

At the beginning of the study, the researcher discussed the purpose and the possibility of conducting a study on lifelong learners (students of the researcher at the OUHK) with the course coordinators of E814 and NU305. They raised no objection. During the first and second tutorial sessions, E814 learners were informed of the researcher's intention to study them throughout the course as case studies of lifelong learning. They were invited to participate in the study to share their learning experiences and

learning journeys on a voluntary basis. During the last tutorial session, NU305 learners were informed of the goals and nature of the study. All respondents were informed that they could quit at any time.

Confidentiality and anonymity are different (Sapsford and Abbott 1996). Respondents were assured that their identities would not be divulged or presented in any identifiable form; this is confidentiality. Respondents were also assured that even the researcher would not be able to tell which respondent answered which particular questionnaire or which respondent provided which particular information; this is anonymity.

There was a need to monitor the progress of respondent learners at the beginning, during, and at the end of the course. Respondents were also asked to crosscheck data collected from them. To guarantee anonymity, data were collected in an “anonymised” form. All respondent identities and data from the completed survey questionnaires and interview transcripts were kept securely confidential. Further, respondents were reminded of the importance of confidentiality during the group interview sessions.

In collecting data from survey questionnaires, the researcher completely relied on the

honesty and accuracy of the responses of respondents. Some interviewees were unwilling and uncomfortable to share their experience; some even found the interview to be intrusive. This explains why interviewers should be skilful at personal interaction, question framing, and gentle probing for elaboration (Marshall and Rossman 1999). The researcher maintained good personal interaction/cooperation with respondents. The researcher also safeguarded their interests. The interviewees were asked to review the transcripts for accuracy and palatability (member checking). They were also encouraged to provide alternative language or interpretations (Stake 1995). Regular feedback from respondents, which reflected new information and ideas, were therefore encouraged and recorded.

### Conclusion

This study explores and describes the unique and individual lifelong learning journeys and experiences of a number of OUHK lifelong learners. The qualitative approach with a case study design was employed. This chapter justified the use of the methodology and methods of the study, and provided a detailed account of the procedures followed throughout the study. Ethical concerns arising from the study were also addressed.



## Chapter Four: Data Analysis and Presentation

### Introduction

This section discusses data from the School of Education and Languages: course work activities and pre- and post-course evaluations of E814 participants (2004-05 intake), group interviews with E814 respondents (2005-06 intake), and an interview with the E814 course coordinator. Data from the School of Science and Technology are also discussed: group interviews with NU305 course members and an interview with the NU305 course coordinator.

The lifelong learning experiences of OUHK respondents were explored through the following questions:

- a) What does lifelong learning mean to OUHK learners?
- b) What motivates students to engage in lifelong learning?
- c) What deters students from engaging in lifelong learning?
- d) What are the current problems and the anticipated future problems facing students in lifelong learning? How do they manage to solve these problems? What support do they receive?
- e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

- f) Why did people choose the distance learning mode?
- g) To what extent is the OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?
- h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

#### 4.1 Preview of the Respondents and Strategies

Data were collected through course work activities, such as e-mail exchanges, reflective journals, Tutor Marked Assignment I (TMA) (April 2004 to January 2005), and pre- and post-course evaluations on April 2004 and January 2005 respectively.

Gender (N=14)		Age				Qualifications				
Male	Female	21-30	31-40	41-50	51-60	Bachelor	Master's			
7	7	1	4	7	2	14 persons	6 persons			
Code	Sex	Age	Occupation	Qualifications		Pre	Post	Interview	TMA	Journal
				Master	Bachelor					
A	F	21-30	Teacher		Economics	✦	⊙	▽	✓	---
B	M	41-50	Trading manager	MBA	Business Admin	✦	⊙	▽	✓	✓
C	M	41-50	Instructor		Engineering Ed	✦	⊙	▽	✓	✓

D	M	31-40	Teaching assistant in primary school	E-commerce	Maths	✦	---	▽	✓	✓
E	M	41-50	Building technician	Arts	Law	✦	⊙	▽	✓	---
F	F	41-50	Teacher		Language in Translation	---	⊙	▽	✓	✓
G	F	31-40	Clerk		Language	---	⊙	▽	✓	✓
H	F	31-40	IT			---	⊙	▽	---	---
I	F	41-50	Teacher (GM)		English / Translation	✦	⊙	---	✓	✓
J	F	41-50		MBA		✦	⊙	---	✓	✓
K	M	51-60	Teacher (Secondary)		History	✦	---	---	✓	✓
L	M	41-50	Senior Facilitate Officer	- Business Admin - Facility Mgt		✦	---	---	✓	---
M	F	51-60	Teaching assistant		Education	✦	---	---	✓	✓
N	M	31-40	Musician / Music instructor	Music	Music	✦	---	---	✓	✓

Table (I) Surveys, interviews, TMA I, and reflective journals (E814 course members,

2004-05 intake)

The data collection process was expanded and extended by collecting complementary views from (a) 5 informants (2 males and 3 females from E814, 2005-06 intake) through a group interview on 16 November 2005; (b) 12 enrolled nurses (2 males and 10 females from NU305, 2004-05 intake) through 5 group interviews from October to November 2005; and (c) valuable individual interviews with the course coordinators.

The interview with Mr. X (E814 coordinator; aged 41-50; Assistant Professor; Ed.D with 15 years of service at the OUHK) was conducted on 21 October 2005, while that with Mr. Y (NU305 coordinator; aged 41-50; Assistant Professor; Ph.D. with 10 years of service at the OUHK) was conducted on 3 November 2005.

Gender (N = 5)		Age				Qualifications	
Male	Female	21-30	31-40	41-50	51-60	Bachelor	Master's
2	3	1	2	2	0	5	3

Subject R: Female, aged 21-30, Trainer

Subject S: Female, aged 31-40, Human resource manager

Subject T: Female, aged 31-40, Teacher

Subject U: Male, aged 41-50, Lecturer in Computing

Subject V: Male, aged 41-50, Teacher

Table (II) Group interviewees (E814, 2005-06 intake)

Gender (N = 12)		Age			
Male	Female	21-30	31-40	41-50	51-60
2	10	9	3	---	---
Interviews			Male	Female	
1. Group Interview I			0	2	
2. Group Interview II			1	2	
3. Group Interview III			1	2	
4. Group Interview IV			---	2	
5. Group Interview V			0	2	
(N = 12)			2	10	

Table (III) Group interviewees (NU305, 2004-05 intake)

4.2. What does lifelong learning mean to OUHK learners?

E814 course members (2004-05 and 2005-06 intakes) readily provided the literal and general meaning of lifelong learning before and after the course. Accordingly, it is a continuous learning process across life in terms of timeframe and time span. They

were obviously familiar with the term “lifelong learning.” They tended to transcribe lifelong learning from its literal meaning, highlighting the role of one’s decision in the continuous learning process. Lifelong learning is described as a natural learning process arising from our developmental stages to manage our physiological needs and problems. As suggested, there are ample learning opportunities throughout our lives, and learning can happen at any moment one want to.

*‘Learning exists everywhere without time limit; one can learn new things through life’ ( Subject B).*

*‘Lifelong learning is getting to know an object. Lifelong learning is learning in all stages of life consciously with attention, target, plan, and purpose’ (Subject D).*

*‘Lifelong learning is a continual learning from the cradle to the grave for survival and adaptation’( Subject H).*

*‘Learning is for life’ (Subject J).*

*‘We go through different stages of learning—childhood, adolescence, and adulthood, and we become more independent and autonomous in learning. In our middle age, we learn to improve our social skills. In our old age, our physiological functions (seeing and hearing) decline’ (Subject U).*

*‘Learning happens in your life. Even attending a social gathering is a kind of learning... learning with purpose ... and learning is endless’ (Subject R).*

The respondents believed that learning naturally takes place. In general, their ideas of lifelong learning in the pre- and post-course survey hardly mentioned any specific

dimension of “learning”(i.e., the why, when, what, and how of learning). First, they were unaware of the complexity of learning. Within the framework of lifelong learning, learning should include WHAT is being learned (a focus on generic skills rather than content knowledge), WHERE and WHEN learning occurs (in the workplace or on-line), WHO the learners are, and HOW they learn (Kennedy 2002b). After the course, they were more conscious about issues, such as the where (place) and what (content) of learning. They were also more ready to use the jargons of formal, non-formal, and informal learning.

Second, they were unable to discern learning as information or knowledge. Most people have more information than they are capable of dealing with due to our advanced information technologies (Stoll, Fink and Earl 2002). However, information alone is only useful when it becomes knowledge. Hence, the terms “learning” and “information” are sometimes preferable to “knowledge” because the latter term implies a finitude or an end product, while the former suggests that which is known is only partial and that the progress of discovery is incomplete (Jarvis 1997).

*‘Lifelong learning includes formal, informal, and non-formal learning, and is life-wide learning’ (Subject F).*

*‘It occurs not only in schools and universities but also in companies, families, and communities’ (Subject J).*

*'Its contents vary, including every aspect involving our daily life'  
(Subject M).*

At the beginning of the course, the respondents narrowly stressed the instrumental functions of lifelong learning, such as the fulfilment of personal, job, and societal needs. At the end of the course, their views broadened. They were able to come up with a few key issues, such as equity and the issue of modernisers versus progressives. Although there is a very strong correlation between the economic health of a nation and the learning health of its citizens, lifelong learning is principally about people and the way in which they can develop their own human potential (Longworth 1999).

*'Learning for economic purposes, such as to survive in an economy, is one of the perspectives of the majority. While lifelong learning should rather (be) seen in a more holistic view, we should also consider the issue of equality and social views'( Subject A).*

*'Lifelong learning is about the progressives versus modernisers, education instead of qualifications, learning for knowledge, and analysis of lifelong learning by change/discourse/ICT/communities of practice/literacies'( Subject C).*

*'Lifelong learning is getting to know an object. Lifelong learning is learning in all stages of life consciously with attention, target, plan, and purpose'( Subject D).*

*'A concept that makes life more meaningful and fulfilling'  
(Subject N).*



A closer look at the course work activities (i.e., reflective journals, e-mail exchanges, and TMA 1) revealed that the respondents were preoccupied with the concept of learning through formal schooling. Their concept of lifelong learning was heavily influenced by their earlier learning experiences when they were children, adolescents, and young adults, which are the initial stages of learning emphasising formal learning/curriculum in schools (primary, secondary, and tertiary). They generally believed that learning is related to “academic achievement.” This echoes the long standing concept that learning needs validation through institutions of learning which evaluate learning formally (Biggs and Watkins 1993). Moreover, receiving passing marks is the evidence that learning has occurred. The higher the grades, the better the understanding is.

*‘My learning journey in the past involved finishing kindergarten, primary, and secondary schooling, matriculation, and tertiary education, and of course going through all the necessary examinations. I studied to pursue academic results rather than interest’ (A’s reflective journal).*

*‘In the past, when people talked about learning, they assumed it would take place in formal institutions. Learning was an academic domain, and learners obtained academic qualifications’ (F’s TMA1).*

*‘Traditionally, learning processes are clearly framed chronologically in accordance with those of formal institutions’ (M’s TMA 1).*

Evidently, the past formal learning experiences of the respondents affected their current views on and practices in lifelong learning. However, in the essence of lifelong learning, a shift has taken place from institutional public education to individual continuous learning as part of everyday life (Jarvis 2000).

*'Before I studied this course, I only considered learning to be formal learning and knew nothing about informal learning and non-formal learning' (Tutorial feedback, anonymous student).*

*'Lifelong learning is taken as the continuation of general education but does not include general education' (Students' tutorial discussion).*

*'Before studying the course, I thought lifelong learning was limited to formal education. After studying the course, I learned that lifelong learning includes formal education, informal learning, non-formal learning, and unprivileged classes' (Students' tutorial discussion).*

NU305 respondents generally began their lifelong learning experience with jobs and interests (non-formal and informal) rather than with formal schooling experience. Probably because they had no much previous formal schooling experience (unlike E814 course members), the nurse respondents were inclined to talk about their leisure and work-related lifelong learning experience. Apparently, it was a good start to move the concept of lifelong learning away from institutional education. In any case, learning can occur in informal or formal settings (Maslin-Prothero 1997).

The difference between formal school and lifelong learning lies in the exercise of one's freedom and autonomy in learning. Unlike primary, secondary, and tertiary education where participation is compulsory, participation in lifelong learning is on a voluntary basis. Learners can exercise a certain degree of freedom and autonomy in deciding about their studies. It is therefore understandable why some informants exhibited bad feelings about their passivity as learners. The past 50 years of research have made it clear that learning is not a passive process (Stoll et al. 2002). In the contemporary society, when most individuals have a degree of freedom and autonomy to undertake their own learning/education, the concept of learning has a number of advantages over that of education. Learning directs responsibility to individual learners for them to undertake their own learning; this reflects the ethos of the consumer society (Jarvis 2002).

*'In the past, I was forced to study. Today, I study to fill in the deficiency. After I graduated from the university, I enrolled in the Diploma of Education by full-time mode. Without any previous or actual teaching experience, I found the course unhelpful, as I failed to apply what I learnt in the class...I then studied a module of M. Ed about teaching English' (A's reflective journal).*

Throughout the course, E814 course members selected views on lifelong learning from the course materials. They acknowledged the role of non-formal and informal learning and realised that day-to-day learning experiences are neglected and

undervalued. This may be true. For many people, learning feels like a random activity (Stoll et al. 2002). It happens or it does not. Clearly, lifelong learning is individualised and unique. Individuals have a framework of reference for interpreting their experiences based on what happens to them and on what they see, hear, and read (Williams 2001). There are many learning opportunities in our lives; learning goes hand in hand with life. Lifelong learning is a continuous learning process. This explains why the respondents had difficulty recalling exactly when and how the so-called “life” learning took place regardless of whether learning was intentional or not.

*‘My professional development as a secondary school teacher is usually self-initiated and depends mainly on my experience in teaching. Life experience allows people to learn more than school with regard to acquiring certain living skills and proper attitudes. A Chinese saying goes, “Walking millions of miles is better than reading millions of book” (讀萬卷書,不如行萬里路). However, most people only learn a little during their lifetime. Is there systematic and better approach for people to learn more during their lifetime even though they are busy in making a living’ (O’s reflective Journal)?*

*‘Lifelong learning literally means learning throughout your whole life’ (Students’ tutorial discussions).*

*‘Learning is living, and living is learning. There is no end’ (Students’ tutorial discussions).*

*‘Every minute is learning; education is life. We learn for work, learn for others, learn for work, learn for other people, and learn for experience. We work to learn, and we learn to work. We*

*start with a situation and not a subject. The changing world also provides a learning environment' (Students' tutorial discussions).*

*'Learning is certainly one of the most meaningful things to do in life if one agrees that one's existence will contribute to the betterment of the world and to the advancement of the human race as a whole' (N's TMA 1).*

From the cradle to grave and through various developmental stages, we face and meet many opportunities, changes, and challenges. Instead of evading, the respondents studying lifelong learning chose to live with these changes. They were resilient in dealing with the difficulties and problems. In this regard, the respondents should be commended. Nevertheless, if learning is such hard work and requires focused attention, it should come as no surprise that people are not always eager and ready to learn (Stoll et al. 2002).

*'Lifelong learning literally means learning throughout your whole life. It is for personal development for maintaining and upgrading knowledge for work and for the enjoyment of leisure hours. In this dynamic era when new developments and inventions are emerging, it is necessary to maintain a competitive edge' (Students' tutorial discussions).*

*'As a professional violinist, I understand that it is a career that truly requires lifelong learning. I cannot think of any other activities that would require an infinite number of hours of practice and an extreme degree of attention to detail throughout a lifetime. There is a vast repertoire that one can never finish learning in a lifetime' (N's reflective journal).*

In view of the changes and challenges, the nurse respondents showed self-direction and accountability. They were responsive to lifelong learning. They believed that lifelong learning is unavoidable in meeting the expectations and needs of society and of professional bodies in a knowledge-based society. Effective adult learning, particularly self-directed learning, is closely linked to an adult's readiness to learn, which in turn seems to be linked to his/her (changing) role as a worker, family member, and so on (Kennedy 2002b).

*'Lifelong learning is the need of the society, and we are living in a knowledge-based society' (Nurse c).*

*'In the past, the senior staff did not study, but they become promoted through seniority. Now, the Hospital Authority cultivated a new culture wherein you can be dismissed if you do not have the knowledge no matter your seniority. It is compulsory that ENs should gain 30 Continuous Nursing Education (CNE) points and RNs should gain 45 CNE points every three years' (Nurse c).*

*'Lifelong learning is the policy of the hospital and the society' (Nurse g).*

The respondents viewed lifelong learning as the voluntary, formal, and continuous education of working adults. They claimed that learning occurs through vocational and leisure activities. They may be correct in regarding lifelong learning as an extension of post-formal schooling. There are two ways of looking at lifelong education—from the perspective of initial education throughout life and from an adult

education perspective extended backwards (Jarvis 1999b). However, lifelong learning is more than vocationalism. It somehow provocatively and optimistically announces the demise of the education and training age (Longworth 1999).

*'In general, lifelong learning is related to adult education on a voluntary basis (you can choose whether to participate or not). Lifelong learning can be categorised in two streams: vocation and leisure activities. Lifelong learning is learning that begins when you begin your working life, for example, if you consider studying for a degree after working... Some will keep studying until their 30s and then start working' (Subject V).*

Similar with E814 respondents (2005-06 intake), the nurses viewed vocational and leisure activities as lifelong learning. The nurse respondents generally held a “work-relax” life cycle belief. Indeed, lifelong learning should be more than this. The learning process of adults starts with (life) experience (Jarvis 1987). Every social situation is a potential learning experience, although that potential is not always realised. Apparently, the informants were effective and self-directed lifelong learners. It should be noted that lifelong learning develops through primary socialisation where individuals are usually encouraged to explore and begin to learn about the environment (Maslin-Prothero 1997). In addition, lifelong learning is an inclusive concept that refers not only to education in formal settings, such as schools, universities, and adult education institutions, but also to “lifewide” learning in informal settings, such as at home, at work, and in the wider community (OECD

1996).

*'I learnt computer and Putonghua. In this new technological era, I needed to learn how to use the computer. In order to communicate with my patients from mainland China, I learnt Putonghua' (Nurse a).*

*'I was interested in languages, and so I studied English and Korean language' (Nurse b).*

*'I have not studied for almost 10 years. I like hiking, and so I learnt how to read the map, signs, and survival techniques through self reading and through my friends' (Nurse e).*

*'When I was an EN, I studied nursing-related short courses, such as CPR, Geriatrics, and ECG, because I knew little about many aspects. After completing the degree course, I also attended courses that I was interested in, for example, baking and weddings. I was quite career oriented in the past' (Nurse g).*

The respondents believed that there were many forms (so-called boundaries) of lifelong learning. They took the view that part-time study after formal schooling is a form of lifelong learning. The initial education stage is from the age of 5 to 22 or 23. At this stage, education is normally conducted on a full-time and daytime basis and is characterised by examinations and qualifications at various stages to denote the levels of achievement (Cribbins 2002). Beyond this formal initial education, which can be taken from age 16 to 17 depending on the school leaving age, we tend to have a less formal, less rigid, and more flexible structure.



However, there should be no boundaries in lifelong learning. The concept of lifelong learning is changing from being equated to traditional continuing education and outside educational establishments to a mainstream concept, which is generally adopted by universities and educational systems (Knapper and Cropley 1991). There is also a broader view of lifelong learning (Longworth 1999). We know what lifelong means in lifelong learning. However, we are not good at knowing what learning means: what the learning styles are, how to use the new technologies wisely and interactively to provoke a meaningful response, and how to direct people, many of whom have learning difficulties, to learn on a mass scale.

*'Literally, lifelong learning is about learning from the cradle to the grave. I consider lifelong learning to begin after formal schooling and to be professional and economic oriented. It does not include leisure activities' (Subject R).*

*'Today, many people take "full-time study" as formal schooling. There are people who continue formal schooling after compulsory education and graduate studies...and then part-time study is lifelong learning...' (Subject R).*

*'Lifelong learning is learning after formal school. In the 1970s, we called it adult education and then continuous education. Now it is called lifelong learning' (Subject T).*

The respondents considered lifelong learning to be the trend and to be market led. They viewed lifelong learning, in the form of professional development and mandatory continuous education, as a necessity. The informants cared more about the

learning product instead of the educational process. The respondents' views on lifelong learning obviously reflected the norms and expectations of a knowledge-based society. Perhaps, it is because Hong Kong, as well as governments elsewhere, has adopted the concept of lifelong learning almost as a campaign slogan (Cribb 2002).

*'Lifelong learning is required by the market' (Nurse a).*

*'I am afraid EN will one day be phased out' (Nurse h).*

*'I do worry that there will no longer be a market for EN' (Nurse i).*

*'Lifelong learning in this knowledge-based society is needed; the society needs it' (Nurse j).*

*'It is the trend to study for a bachelor's degree' (Nurse g).*

According to Mr. Y, lifelong learning means that one can learn anything. Similar to the ideas of the NU305 course members, lifelong learning is about the outcomes of learning (i.e., qualifications). Indeed, it is more concerned about knowledge of learning itself. What universities teach is not knowledge but information (Jarvis 1999a). Information becomes knowledge when it is learned, and it only becomes legitimate knowledge when it is found to work for the learners.

*We are born to learn. Lifelong learning is a process. The question is: what do we learn? We can also take lifelong learning as an outcome in terms of recognition or certificates... It depends on what your purpose is, for example, studying a bachelor's, master's, or Ph.D.' (Mr. Y).*

However, Mr. X objected to the view of lifelong learning currently held by the government: that lifelong learning as an instrument in a knowledge-based economy and that it is clearly market driven. In the political context, lifelong learning is unreservedly a good thing; it is an exhortation for good citizens to take lifelong learning as a duty and as a means for economic salvation in the knowledge-based economy (Cribbin 2002). As in Hong Kong, governments elsewhere have adopted the concepts of lifelong learning almost as campaign slogans. Such instrumental views compromise individual benefits and personal development. The Hong Kong government put in parallel the terms “lifelong learning” and “continuing education,” reflecting broadly an orientation towards vocational education for the fulfilment of (national) economic goals or for concerns in individual self-realisation and social equity (Kennedy 2002c). In the past, adult and continuing education encompassed both general and liberal adult education, where students undertook courses for their own sake and for their own personal development. Further, while being totally realistic, education must be a means to other ends, such as employability. However, we should not forget that it is people who learn, and they should be their own ends (Jarvis 2002). In the marketplace of learning, there are those who will be excluded, and we need to encourage national policies that will widen the access and make more available the benefits of the learning society to a greater number of people.

*'We called it adult education and then continuous education, Now it is called lifelong learning. In the past, adult education implied a second chance. There is no such meaning today. Lifelong learning can stand for (a) qualification, (b) skills for survival, and (c) personal development. Indeed, the meaning of lifelong learning today stresses on the need for qualifications and skills' (Mr. X).*

## Conclusion

The meanings of lifelong learning held by the E814 and NU305 course members did not significantly differ. The respondents proffered a narrow and short-sighted view of lifelong learning. To them, lifelong learning is adult continuous education for professional development, and it pays little attention to personal needs. They were concerned with the continuity of formal studies in “education and training” rather than with “learning” at their discretion. Granting that initial education no longer equips people with the necessary knowledge and skills needed to guarantee employability and to sustain competitiveness throughout a working life (Kennedy 2002a), then the respondents were correct. Probably because of the differences in educational backgrounds, the NU305 course members were slightly anxious about the effect of the knowledge-based economy and society. Moreover, they exhibited a “work-relax” life cycle belief.

Taking lifelong learning as a piece of conceptualised information, the respondents were able to take a broad view of lifelong learning on philosophical grounds.

Accordingly, lifelong learning is about any learning in one's lifetime. However, as far as learning contents and practices are concerned, the respondents generally took the instrumental view of lifelong learning. Hence, they were puzzled about when lifelong learning should start and what lifelong learning really is.

The lifelong learning activities of the respondents were apparently "intentional," although they considered "formal" academic and vocational studies as prime objects in the pursuit of lifelong learning, paying little attention to "non-formal" and "informal" learning experiences. Learning has the widest possible boundaries (Smith and Spurling 1999). It includes all the main types and classes of learning: vocational, critical, formal, and the opposites of all these. It includes formal and informal education and self-directed learning. The context of lifelong learning is wide, encompassing households, communities, employers, all kind of associations, and even individuals. The learning process can also be described in terms of the intentions of the learner.

To the E814 respondents, what distinguished lifelong learning from their previous learning at schools is that they could exercise freedom and autonomy when studying. Therefore, a lifelong learner is different from a student. To students, learning means

being taught and passing tests, and the higher the mark, the better the learning is (Biggs and Watkins 1993). However, what is taught may have little relevance to what is experienced in real life. This makes school learning different from learning in everyday life. It is noteworthy that the respondents learned “lifelong learning” from different aspects, and they were interested in LEARNING. Although they experienced learning difficulties with some abstract concepts or theories in their study guides, the course on lifelong learning, to some extent, broadened their understanding and views about lifelong learning.

This study reviewed the different views of adult educators (Mr. X and Mr. Y) on lifelong learning in the context of Hong Kong’s current situation. It is possible that their views about lifelong learning affected the lifelong learning approaches of their students. Mr. X was more critical about current lifelong learning issues than Mr. Y. Mr. X was sceptical about the government’s lifelong learning policy. He felt that a market-led and economic-oriented approach masks individual needs. Accordingly, this inevitably makes some subjects/courses more “valuable” than others. He was frustrated that unlike other countries, Hong Kong lacked opposition voices and critical views to counter the current unhealthy practice.

#### 4.3. What motivates students to engage in lifelong learning?

Reflecting on his lifelong learning experiences, Mr. Y claimed that lifelong learning serves both instrumental and expressive functions. The motives for participation in learning are often a mixture of three categories, namely, extrinsic (job advancement), intrinsic (self-improvement), and social/affiliative motives (McGivney 1993). Further, three factors (i.e., “self-development,” “to improve job skills,” and “to fulfil interest”) stand as the most important motives for adults in attending continuing education courses (Chan and Holford 1991). Furthermore, lifelong learning can be a product, a process, or an ideal, whether it is all learning from the cradle to the grave or just post-compulsory learning (Reeve et al 2004).

*‘When I completed my secondary school, I began my nursing training. After becoming an RN, I learnt how to appreciate music. I studied Management, Diploma in Nursing, Diploma in Health Education, and Bachelor of Nursing. I also studied in the UK for a Master of Education because I enjoyed studying, and I wanted to teach. I have completed my Ph.D. because it is necessary for me to be able to teach in tertiary institutes (like the RN conversion course, which is a must). Later on, I would like to obtain a master’s degree in music...’ (Mr. Y).*

*Looking back on the first half of my studies, I studied for expressive function. It is because I believe in destiny. Everything is pre-determined, and it is nothing to do with humans... whether you are promoted or not...’ (Mr. Y).*

*‘Ph.D. studies is a kind of training and enhancement in thinking... I took my Ph.D. because I wanted to pursue the improvement of my thinking (expressive function) and of course*

*because it is instrumental to my job security' (Mr. Y).*

*'Lifelong learning can also widen one's horizon or life and facilitate career advancement. In a knowledge-based society, career advancement cannot rely on experience alone. We need a ladder to climb up on' (Mr. Y).*

The role of intrinsic motivators, such as “interest,” in sustaining lifelong learning was deemed important by the respondents. This general trend should be maintained. Among Hong Kong students, there is no restrictive distinction between extrinsic (work) and intrinsic (interest) motivation (Kember 2000). Intrinsic and extrinsic motivations may be viewed as variables that can vary across situations and times; extrinsic motivations may reduce intrinsic motivation. Moreover, they may be viewed as trait variables that represent cross-situationally and temporally stable individual tendencies to be intrinsically and extrinsically motivated; intrinsic and extrinsic motivation are reciprocally independent (Moneta and Siu 2004). In addition, it can be said that the age of education and training is dead, and the focus of the future should be converted into a new era of learning (Longworth 1999). Learning has to become fun, enjoyable, and pleasurable.

*'Psychological factors are important for the development of lifelong learning' ( Subject G).*

*'Lifelong learning development needs sustainable curiosity and to be sensitive to changes' (Subject M).*



People receive bonuses (intrinsic awards) by pursuing lifelong learning. For example, the self-confidence of lifelong learners become strengthened, and they become appreciated for their efforts in and attitudes towards learning. However, a person's level of intrinsic and extrinsic motivation fluctuates during daily activities. This fluctuation is influenced by environmental stimuli and opportunities (Moneta and Siu 2004). Further, people differ in their average tendencies to be driven by the engagement of work and by some means-end factors extraneous to work itself.

*'Based on my recruitment experience, I now have a better impression of those who pursue learning. They are appreciated for their efforts in contributing money and energy. Learning makes them smarter and livelier' (Subject S).*

*'Lifelong learning increases my confidence and enhances my thinking. Not studying makes me ill. I keep on studying even when selling "shares in the stock market" for school fees... to obtain my degree' (Subject V).*

The respondents pursued lifelong learning to satisfy their interests and personal needs (intrinsic motivators).

*'I am a full-time teacher, teaching weekend or evening classes for adults (I am also an OUHK part-time tutor). I want to pursue education qualifications. I would like to pursue my study for interest but for now I will take formal studies first to obtain a certificate... I will pursue my study for interest after retirement. Studying is not just for the sake of studying. Studying is for living' (Subject U).*

Respondents who chose to study succumbed to mounting pressures from peer groups and from economic needs.

*'People study for economic reasons. It is not for our learners to define what lifelong learning is... You may choose to participate or not. Yet, pressure from people around you will make you move. It is a complementary and supplementary relationship' (Subject T).*

For the nurse respondents, studying to become an RN and to obtain a bachelor's degree helped them advance their academic studies and professional development. There are limited lifelong learning opportunities for ENs in the health care setting (they are usually viewed as second-class nurses working under RNs). Therefore, they are eager to study when opportunities are provided. In fact, many Hong Kong adult learners undertake further studies for career enhancement (Kennedy 2002a).

*'There are limited sponsored courses and places in the Institute of Advance Nursing Studies from the Hospital Authority for ENs' (Nurse c).*

*'The learning opportunities for ENs are limited. Hong Kong University School of Professional and Continuing Education (HKU SPACE) offers limited courses for ENs. I studied an endoscopy course for ENs' (Nurse e).*

*'RNs have more courses than ENs to study. The provisions for ENs are only available from HKU SPACE and the Association of Hong Kong Nursing Staff. Sometimes courses are cancelled if the number of enrolments are inadequate' (Nurse f).*

The low status of ENs drove the respondents to attend the RN conversion course. Their psychological drive might have also been an important factor. It is important not to make a simplistic distinction between those who have intrinsic motivation (and are studying for interest) and those with extrinsic motivation (those who are solely interested in material rewards and who will only do what is necessary to achieve their goals) (Kennedy 2002b).

*'I feel inferior and have a feeling of being compelled to get through it. I can learn new knowledge, new ways of thinking, and meet new friends by taking the conversion course' (Nurse a).*

*'There are differences between an EN and an RN. An EN carries out routine work, while an RN is in charge of the cubicle' (Nurse c).*

*'I did not know that there were differences between ENs and RNs before becoming a nurse. ENs are belittled by the staff nurses no matter how well you performed. If I had known the difference, I would have struggled to obtain a grade C in the School Certificate Examination to qualify me to apply for an RN post' (Nurse e).*

*'The prospects for ENs are not good. In my private hospital, the salary of the ENs was reduced but not that of the RNs' (Nurse g).*

The RN conversion course at the OUHK provided the respondents with a golden opportunity. For the EN respondents, it was a second chance for learning. The provision of learning opportunities is important for lifelong learners. In Hong Kong, a nurse must have tertiary qualification both for professional development and for

career advancement (Tse and Wong 2002). In addition, from the perspective of lifelong learning, education and learning are considered lifelong processes that can be utilised by individuals to develop themselves both personally and professionally (Maslin-Prothero 1997).

*'To be an RN is my wish' (Nurse a).*

*'I do mind and feel ashamed of being an EN. When I was studying to become an EN, my boyfriend studied in the university. I did not join his social gatherings, and I did not want to know other people. Now after finishing the RN conversion, I feel totally different' (Nurse c).*

*'Lifelong learning is not just a matter of what you want! As an EN, there are not many choices in studying. Most of the courses are for RNs. I was not able to study to become an RN because I failed to meet the basic entry requirement. By studying a bachelor's degree, I can become a role model to my daughter, who is also an undergraduate, and at the same time accomplish my goal' (Nurse d).*

For the respondents, learning fulfils instrumental more than expressive functions.

*'Without any statistics or formal studies, I feel that most of the learners study to get a "Pass". After the diploma conversion course, half of them still come back to study a bachelor's course for 30 credits. They study for instrumental reasons. Some pursue the expressive function by submitting all the assignments and by doing well in the examinations. Some learners not only study for a degree but also for self-enhancement. People study for different reasons, processes, or outcomes. It is normal' (Mr. Y)*

The pursuit of qualifications provides people with gratification and satisfaction in both materialistic and psychological aspects. This is because learning does not only

increase one's knowledge base but also enhances competitiveness—the essential need of adult learners. Moreover, much of everyday learning springs precisely from a felt need to learn (Biggs and Watkins 1993). For the respondents, the need for empowerment seemed to be the primary driving force behind their pursuit of lifelong learning. The beliefs of “knowledge is power” and “knowledge can change one's destiny” remained influential. To survive in a turbulent and changing environment, informants were keen on learning to adapt to changes and to survive.

Learning happens in the dissonance that occurs when ideas are put forward for question, examination, and possibly for radical changes (Stoll et al. 2002). Human capital is an important element of national competitiveness and a major determinant of prospects for sustained economic growth in a climate of change (Tuijnman 2002a). In addition, through different research reviews, the returns to individuals' undertaking of award-bearing courses through lifelong learning are quite significant (Cribbin 2002).

*‘... people feel the speed of economic and social changes and the pressure of economic competitiveness...They start to re-think their future and understand that initial education is no longer sufficient for the rapidly changing context and that lifelong learning can be a means for job security and job promotion’ (B's TMA 1).*

*'Lifelong learning has become a hot issue in recent years. Lifelong learning has become very important, especially in Hong Kong. People tend to obtain higher qualifications through further learning, making their lives better with higher a living standard and social status. Further learning makes individuals more competitive in the job market' (F's TMA 1).*

*'Knowledge is power. Learning faster gives you more power' (O's TMA1).*

*'There are a number of reasons why we have to learn: social and economic needs, updating work-related knowledge, and gaining power for change and competitiveness. Psychological needs broaden the horizon of our knowledge, self-actualisation, and interest' (O's reflective journal).*

Mr. X argued that lifelong learning should not be linked to qualifications alone.

One should not only judge another person solely by his/her qualifications. A well-educated and well-trained labour force is crucial to social and economic well-being (Tuijnman 2002a). Hence, the development of education and training systems, and the improvement of labour force qualifications should be featured importantly in any country's long-term strategic agenda. Lifelong learning should also be promoted for non-economic reasons.

*'I spent six-and-a-half years completing an ED programme. My qualification does not mean I know many things. There is a belief that a Doctor--an academic--should know many things and have a higher social status, but I believe that this is totally wrong! The society should appreciate and show respect to those people who read a lot and who are willing to share with other people their knowledge or interest. Lifelong learning should not focus so much on qualifications, although qualifications are beneficial. Later on,*

*I would like to learn to play Chinese musical instruments' (Mr. X).*

## Conclusion

The informants seemed to have taken lifelong learning synonymously with education and training. They pursued lifelong learning to meet the needs of society and their professions. The government's propaganda that we live in a knowledge-based and economic society appealed to them. Indeed, in a rapidly changing society, the argument for a move towards education and training systems that encourage learning beyond compulsory education and throughout the lifespan is compelling (Hodgson 2000). However, lifelong learning heralds the demise of the education and training age (Longworth 1999).

Learning is not synonymous with education and training. It includes the products of education and training, the processes of both formal and informal learning, and various types of learning, such as skills, knowledge, understanding values, experience, and attitudes.

Informants were concerned about short-term expediency rather than about the long-term goals of lifelong learning. In a competitive and changing environment, Field and Leischester (2000 p. 171) argued that *'learning is viewed as a kind of*

*investment with the returns of qualifications—an instrumental view of learning*'. The E814 and NU305 course members participated in lifelong learning to respond to needs and changes. This suggests a culture of continuous learning in particular vocational and professional fields rather than that where lifelong learning can flourish. Indeed, the respondents may be called opportunistic lifelong learners who are externally goal-oriented towards social demands. They use learning as a means to achieve a particular end (Hallam 2007). They use reactive, specific, and intermittent lifelong learning strategies (Smith and Spurling 2001). They are high in extrinsic motivation but low in intrinsic motivation and in fulfilling their external self. People who are high in extrinsic motivation look ahead and anticipate rewards or punishments (the carrot or the stick) that will be received upon completion of the task or upon failure to complete the task. They tend to take the shortest and easiest path to the end, and they enjoy work only after its completion, when they can savour the rewards or celebrate the avoidance of punishment. In the absence of incentives, individuals with high intrinsic motivation proactively explore the environment, seeking interesting stimuli and opportunities for action, while those with low intrinsic motivation come to a halt and remain passive until the environment provides them with incentives. Individuals with high intrinsic motivation tend to find interesting tasks whether or not their environment is rich in opportunities, while those with low



intrinsic motivation tend to find all possible tasks to be equally uninteresting (Moneta and Siu 2004).

NU305's course coordinator and learners shared a similar view: in a knowledge-based economy, people need to learn. Mr. Y showed his understanding and sympathy for learners who study for instrumental reasons, believing that their studies will help them climb up the social ladder. Lifelong learning is *'both a truism—how can we not learn, in some sense, as we continue living? The point is how to structure, encourage and support that learning (i.e., through lifelong education)—and a wonderful slogan'* (Tight 1998 p. 254). Learning is constructed, that is, what is learned depends on the way we look at things, and learning is self-determined (Biggs and Moore 1993). Unfortunately, the emphasis on instrumental views and human investment in lifelong learning narrows down the scope of lifelong learning. Lifelong learning does not only have lifelong but lifewide dimensions (Faure et al 1972).

While Mr. Y undertook lifelong learning for qualifications, Mr. X wondered about the returns of investment by pursuing qualifications because employers do not only consider qualifications but also performance. The drawback of increased access to higher education is a glut of well-qualified people who cannot find jobs (Becher

2000). Graduates are employed in less demanding and less well-paid jobs, while non-graduates who previously held those jobs have to lower their own occupational sights. He himself admitted that his Ed.D. qualification does not mean he knows everything. Hence, learning should not be measured by qualifications.

#### 4.4 What deters students from engaging in lifelong learning?

The road towards lifelong learning is not as straight as expected. For various reasons, a number of deterrents and problems lie ahead, discouraging lifelong learners. There are factors hindering people from participating in continuing education. There are “major deterrents” (e.g., no time, inconvenient meeting time, need to take care of the family, lack of course information, and inconvenient meeting place) and “other deterrents” (e.g., cost, course, self-confidence, disinterestedness, preference for other activities, and preference for self-learning) (Chan and Holford 1991).

Commitment to families and financial burdens dampen the enthusiasm in lifelong learning. The ways of teaching and learning were also considered by the respondents when they decided to pursue lifelong learning.

*‘I have a family and two kids to take care of. I also have to sacrifice my leisure activities’ (Subject S).*

*'I agree with Subject S... family and kids are the barriers'  
(Subject V).*

*'I would like somebody to explain my studies, but the OUHK needs students to study by themselves...'  
(Subject H)*

*'I am an independent person. Of course, we can get benefits from group interaction, but it is not guaranteed and, it depends on... the willingness to contribute and the students' other commitments (family...). Yet, I think a tutor is more important because he/she will help you and guide your thinking'  
(Student T).*

*'I believe learning is to be done at a young age. Before having the burden of a family burden and while I have more time, I will commit myself to studying'  
(A's reflective journal).*

*'Lifelong learning is a very good idea. Theoretically, it is ideal for everyone to pursue lifelong learning. However, there are many deterrents, such as time and money. Besides, it is not easy to develop learning organisations let alone learning society'  
(Tutorial feedback, anonymous student).*

*'HK government wants HK people to study, but there are so many barriers: time, money, and work and family commitment. We are not robots that can work non-stop for 24 hours per day, 7 days per week'  
(J's reflective journal).*

The nurse respondents and E814 course members shared similar problems.

*'Now that I have commitments to my baby and to my family, I would not consider to further my study unless I was single. Lifelong learning is about interest and should be learned slowly'  
(Nurse c).*

*'People will not quit their studies due to difficulties in learning. Financial strains exist when they do their practicum while receiving only a student nurse's pay'  
(Nurse c).*

*'I had to sacrifice time with my daughter when preparing and doing my assignments' (Nurse f).*

*'I studied for materialistic reasons because fees were expensive...even learning floral decoration... plumbing, etc.'*  
*(Nurse l).*

Lifelong learning is marginalised in terms of age and gender. It should provide equal chances for people to study, allowing them to participate in lifelong learning. However, the truth is that disadvantaged people, such as the elderly, are barred from lifelong learning. The prevailing view of education is that it is restricted merely to the upbringing of children and young people (Titmus 1999).

*'Age is the barrier to my lifelong learning. I put in more effort and time than the younger ones when studying the computer. This makes me feel depressed and frustrated' (P's TMA 1).*

*'In 2000, I noticed that two senior members in my family were inactive and were enjoying limited social activities. One of the barriers is that they could not engage in outdoor and long duration activities. In their failure to acquire the learning skills and attitudes, they will be treated as outdated persons and be excluded from social activities. Moreover, their civil rights may be restricted, tarnished, or deprived' (M 's TMA 1).*

The informants had to struggle through problems commonly encountered while undertaking part-time and open learning studies, such as time, money, age, and language problems.

Lifelong learning, as an enterprise, is being marketed.

*'The E814 course should be an interesting one. However, it was heard that the number of enrolment for this course is low. Teacher learners prefer taking a course that would give them an opportunity to receive materialistic awards by enrolling in language programmes' (E's e mail).*

By making lifelong learning market oriented and self-financed, recent educational reforms have neglected the interest of individuals. The EC (2000) report on the learning society and knowledge-based economy reflected the tendency to view education as a major player in the society of the future (Jarvis 2002). However, a learning society has now become a learning market. Providers produce whatever commodity sells, and while the educational commodity may help some people towards self-fulfilment, only individuals who have both the time and finances will be able to purchase their education in the marketplace of learning. Others will simply be socially excluded. In the context of Hong Kong, the continuing education (CE) community has been criticised for its failure to make CE an important educational policy issue (Cribbin 2002). The perception is that CE is simply market oriented. The very active and extensive market for CE in Hong Kong, by and large, remarkably caters to the need for retraining and reinvesting in the new skills of displaced employees (Chung et al 1994).

*'The reform was based on the principle of marketing, concerning about cost and personal investment, and putting pressure on the learners and parents. If education is so much linked to the market, investment, and materialisation, people will not enrol in any course without immediate rewards. Besides, educational institutes will no longer run any course which does not attract adequate students to make ends meet. I am doubtful people that will choose to study subjects like philosophy, which does not guarantee immediate returns! I am also upset that the influence of marketisation extends to the sector of higher education. For example, courses like master's degrees and associate degrees become self-financing, categorizing educational activities as "useful" and "not useful". The so-called "not useful" courses will be phased out eventually. This is not healthy for a lifelong learning society' (Mr. X).*

## Conclusion

The respondents reflected that formal studies are not easy for adults who have many commitments and responsibilities, particularly those of the financial and family kind.

The reasons for non-participation are lack of information, situational barriers (time and cost), institutional barriers (the unresponsive system), and dispositional barriers

(McGivney 1993). In this study, the participation of respondents in lifelong learning

was not natural but was deterred by, to a certain extent, the issues of age, policy, time,

money, society's needs, and particularly by the user pay policy and the educational

marketisation of learning. In terms of the number of students (consumers), the number

of institutional providers (suppliers), and the number of educational programmes

offered (products), Hong Kong is a large, active, and international educational market

(Lee and Lam 1991). Unfortunately, Hong Kong's supposed learning society has now become a learning market (Jarvis 2002). Providers will produce whatever commodity will sell, and while the educational commodity may help some people towards self-fulfilment, only those who have both the time and finances will be able to purchase their education in the marketplace of learning, while others will be socially excluded unless they receive more help from the state.

4.5 What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

Most of the course materials adopted from the UK make studies difficult. They generally reflect foreign cultures, and the language and learning contexts may block the process of learning. In acquiring knowledge from tutors, learners become quite dependent on face-to-face tutorial sessions. Undergraduate learning and academic writing in English were found to be problematic by the respondents who completed secondary education. The respondents depended on the tutor for explanations. Hence, it is correct to note that learning may be turned to a nightmare when meeting difficulties associated with learning through a second language (Kirby et al. 1996).

*'My EN training is in Chinese. Now, the assignments are written in English. It is a hard work' (Nurse h).*

*'Reading materials are difficult to comprehend. Tutorials provide helping tools to understand difficult theories in the reading materials' (K's learning portfolio).*

*'I took the module "Supporting Lifelong Learning" for almost four months. I find this module the most difficult one in MEd because I don't know how to tackle the abstract concepts of lifelong learning, and I am not good at reflection and critical thinking, which are required to study this module' (I's reflective journal 2).*

Unlike E814 learners who were used to academic studies, the nurse respondents faced difficulties in finishing assignments and in taking examinations. However, these difficulties were better handled later during their studies. Even the most established open and flexible institutions (e.g., open universities) have to place some constraints on their students (Maslin-Prothero 1997). These include the time given to complete modules, to submit assignments, and to undertake examinations.

*'My difficulty in studying in the OUHK stems from the course and the examination. I am not interested in nursing. Without interest, it is very difficult to pick up the book to study. Studying this course is for career advancement, as an RN's basic requirement is a bachelor's degree' (Nurse c).*

*'The OUHK is allowed lenient IN but strict OUT. By the way, one can pass if one cared about the study' (Nurse f).*

*'I do not have any difficulties in studying. I have no economic and family burdens. The most difficult time was doing the assignments and preparing for the examinations, but it is still tentative' (Nurse g).*



Apparently, the respondents were too busy to study. Hence, they opted for a part-time study mode.

*'Recently, I have been busy preparing for the coming examination on E813. Anyway, the exam will be on 6/8/04, which is the exact day for the deadline for the TMA2. Well, I just worry whether I will have sufficient time to finish the readings and to submit the assignment on time' (A's e-mail).*

*'I apologise for asking for a 7-day extension for my TMA 3 as I have been busy with work recently' (B's e-mail).*

*'As tutorial 3 is going on right now, I am writing to you from Singapore between rehearsals. I am still not clear about the topic of the TMA1... guess I will need to ask you about that on the phone when I come back. If you could let me know tomorrow, it would be great so that I could start working on it while I am still in Singapore' (N's e-mail).*

Open access is an incentive of lifelong learning; however, it brings both advantages and disadvantages. Open and distance learning does not suit every learner. Support from tutors is therefore always important. The setting at the OUHK limits learner-tutor and learner-learner interaction, making the 'all around development' of learners difficult.

*'Hong Kong students lack the confidence in the ability to solve problems independently through a self-directed investigation of the resources currently available. It is rather difficult for students to adapt to a new mode after entering the tertiary education' (A's TMA 1).*

*'Learners without experience in formal tertiary education seem to lack the chance to experience more in social and moral development' (A's TMA 1).*

Part-time study and self-directed learning are not easy.

*'During my study at the OUHK, the role of learner has changed. Learners have to be more "self-directed", and the courses are more "learner-centred". The role of tutors is only to "facilitate" and to "coach" rather than to "teach". In the beginning, it was quite difficult for me to adapt to such change, and I did not get good grades (product), but after one year of learning, I began to be familiar with such approach, and my grades improved' (B's TMA1).*

*'In the OUHK, the mode of learning changed from teacher centred to student centred' (P's TMA 1).*

*'All the tutors at the OU are part-time. Outside the lecture hours, learners can only approach the tutor by phone at designated hours. As a learner, I can only say that it is not a proper way of delivering a learning programme' (E's e-mail).*

In distance learning, learners are likely to adopt a passive rather than an active mode of learning. A teacher is perceived to be an authoritative source whose job is to guide students systematically through a set of tasks step by step, varying the pace according to students' understanding (Kennedy 2002b). Given the passivity of learners in the distance learning mode, the informants in this study had the tendency to resort to rote learning.

*'Hong Kong education system is spoon-fed. When students find that the learning is difficult and there is nothing to learn by themselves, they leave the OUHK because they prefer passive*

*learning. The OUHK requires students to take an active role rather than a passive role in learning' (Mr. Y).*

*'Hong Kong students are accustomed to lecturing, and they welcome as many lectures as possible – an indicator of the so-called good course, but they may choose not to come. To study in the OUHK, students are supposed to use the course materials appropriately because course materials are equivalent to “lectures in print” (i.e., reading one hour of course material is equivalent to attending an hour of lecture). They should read the study guide before attending the tutorial. Tutorials serve to complement the course materials. Yet, most students do not pre-read any material. They come and sit in the tutorial sessions, making no contributions' (Mr. Y).*

*'Tutors are important. Some are good not enough because they do not tell you the key points or issues to be aware of in the tutorial or phone enquires. To our dismay, they only tell you what you need when marking the assignment' (Nurse f).*

*'It is cruel that the tutor does not divulge the requirements until the assignment has been submitted' (Nurse g).*

*'In studying the diploma course, I found that the tutorials were packed. Now, having lesser tutorials makes me feel inadequate because I do not knowhow to ask questions by phone. Basically, I have adopted the way of learning in the OUHK. By the way, studying in the OUHK is a little bit cheaper' (Nurse g).*

*'I do like having more tutorials, which help me absorb the lessons better' (Nurse f).*

*'The spoon-feeding learning style does not fit with OUHK learning' (Subject V).*

*'There are many people enrolled in the OU courses, which require no entry requirement. In the end some quit...Now I wonder if it is a good policy' (Subject R)!*

The respondents were accustomed to task- or result-oriented learning. They were concerned with assignments and examinations more than the course material itself. Effective learning strategies, such as the task-oriented and examination-oriented approach commonly used in secondary schools, are unavoidably used repeatedly in tertiary learning, even at the OUHK. Hence, students do not find the university environment too difficult compared with the environment in secondary schools (Kennedy 2002a). Students press their lecturers for notes, handouts, and well-defined examination syllabi. Such learning approach is called the surface approach (Biggs and Watkins 1993), and the common surface strategy is rote learning. Surface-motivated students focus on what appears to be the most important topics or elements, and they try to reproduce them accurately.

The examination culture in mainland China and Hong Kong influences learning styles (Kennedy 2002b). The ancient Civil Service Examination tested the ability of examinees to memorise classical works, and little has changed in the examination system of China and Hong Kong. Learning for examinations still relies heavily on memorisation, promoting surface learning. Conversely, the de-schooling movement, which was founded in the 1960s (Hartley 1998), argued that schooling leads children to develop fear of failure and strategies to hide this from their teachers—strategies

that last for a lifetime. Such behaviours are caused by the 'hidden curriculum' in schools and even in higher education.

*'Learning in formal institution still relies very much on capturing "re-using" knowledge based on a standard curriculum set. Most often, examinations focus on recalling information taught rather than on constructing or reflecting knowledge' (A's TMA1).*

*'OU students prefer lectures rather than discussions. Many were frightened by the presentations and never came back to the tutorials. I do not know whether they can still pass the examinations or not' (J's reflective journal).*

*'I am trying to prepare for the exam, but I am overwhelmed by the amount of materials I have to cover. I assume that you will give us some advice on how to prepare for the exam. I would appreciate it if you would advise me on the major areas that I should concentrate on' (N's e mail).*

In Hong Kong, learners are accustomed to instrumental and superficial learning approaches; hence, these approaches are also evident in the OUHK. These approaches contribute to low marks and to the poor quality of student course works (assignments). Even at the master's level, writing assignments usually reflect superficial rather than in-depth arguments.

*'Once tests and examination are used as the major assessment criteria, students again will heavily rely on memorisation of already known information instead of on learning constructive ability' (A's TMA1).*

*'OU students prefer lectures rather than discussions. Many were frightened by the presentations and never came back to the*

*tutorials. I do not know whether they can still pass the examinations or not' (J's reflective journal).*

Over-confidence, lack of time management, and lack of self-discipline hinder the process of lifelong learning. Adult learners who are engaged in many activities should be mature and realistic enough in planning their studies. Distance learning requires self-reliance, learner autonomy, and tolerance of uncertainty and ambiguity—a list of traits that seem to be diametrically opposed to those possessed by Chinese learners (Holmberg 1989).

*'People should think well ahead of their study... their plan, the needs of the institutions... what happens next? What are the risks they should face? They should be mature and not just an adult learner' (Subject T).*

*'OUHK learners have to be mature...' (Subject U).*

To overcome barriers and to deal with problems, learners should possess some personal attributes to adjust and adapt to the difficulties they will face. Fortunately, adult Hong Kong learners are receptive to modes of learning quite different from those encountered in schools (Kennedy 2002b). In addition, most students hold dichotomous belief orientations (i.e., didactic/reproductive and facilitative/transformativ) about knowledge, teaching, and learning (Kember 2001).

*'If I start on it, I'll commit to it. Besides, I know myself. I know my learning styles, and I know my target... in my own pace. Full-time work (barrier) and part-time studying may be difficult,*

*but learning makes me reflect about my work, and I can apply what I learn to my work. I have learned to change the barriers into something positive' (Subject T).*

*'Teachers usually get through the difficulties probably because they are stubborn, inconceivable...' (Subject T).*

To engage in lifelong learning, learners need to be equipped with problem-solving skills, such as time management and self-discipline. Ip (1996) studied the coping strategies adopted by Hong Kong adults (247 mature students from the City University) when faced with time constraints, work pressure, and family responsibility while studying. It was discovered that the first broad strategy of learners is trying to cope with problems themselves and then turning to their spouses and family members for support. Their last resort is seeking help from professionals (teachers or counsellors). However, the cultural appropriateness of what are largely western models of distance learning that emphasise individual study and self-management, autonomy in learners, learner choice, active learning, and independent learning is questionable (Robinson 1998).

*'Unlike the face-to-face learning mode, OUHK learners should be more self-motivated. For example, they should participate or complete some self-directed activities suggested in the course material (e.g., some exercises). Indeed, most learners would skip such activities due to reasons of being busy and having assignments and examinations. In general, learners underestimate the time to study and overestimate themselves. Thus, they delay handing in their assignments and adopt a surface approach to learning. Somehow, their learning is focused*

*on completing the assignment. There are complaints from learners that the course materials are difficult. This is probably due to the learner learning by himself/herself and to the lack of face-to-face lectures for explanation' (Mr. X).*

Perseverance and support from families, peer groups, and tutors/tutorials are important factors that support distance learning. Factors such as previous successful learning experience/outcome, family background, lower expectations, and optimistic characteristics (never giving up) also sustain the pursuit of lifelong learning. In pursuing the long process of lifelong learning, the respondents took their EFFORTS more seriously than their ABILITIES. The Confucian culture attributes the successes of students to efforts; conversely, failure is attributed to the lack of effort. Westerners, in contrast, believe that success requires ability more than effort, and failure is attributed to the lack of ability (Biggs 2003).

*'My way to overcome my difficulty in learning is to tell myself that I must study; this is a job requirement; I must succeed' (Nurse c).*

*'I agree that not everybody is suitable to study in the OUHK. Nurses have more tolerance' (Nurse e).*

*'I am single, and studying to me poses no problems. Later on, I'll learn photography and diving. If you are interested in something, you should not be bothered about issues of certificates, money, and time. By the way, if you have paid money to learn, you should keep going. Stick to your principles and do not give in midway' (Nurse e).*



*'Family support is very important to sustain my learning. My daughter is studying in the Hong Kong Polytechnic University. She not only pursues her own studies, but she also helps me to search for the necessary materials, type my assignment, and do the chores. I have a group of classmates and we learn together. The moment I enrolled in the course, I did not once think of quitting' (Nurse g).*

*'Everybody can study in the OUHK on the condition that he/she is willing to work hard with the help of a tutor and guidelines' (Nurse g).*

Studying at the OUHK requires hard work and self-study. Unfortunately, not everyone has these characteristics. This raises another issue in lifelong learning: the importance of personality (learning styles and emotions), not just efforts and ability. OUHK learners must be psychologically prepared to learn.

*'Studying at the OUHK requires perseverance. For example, completing a 120 credit bachelor's degree programme may take 12 years, and for the Diploma course, learners need to meet the requirement of 80 percent attendance by having 16 hours of lectures per week. It is human nature to be "lazy", without other people pushing you. Just relying on your own "will" to study is not easy. Therefore, not everybody is suitable to study at the OUHK' (Mr. Y).*

*'Indeed, the attrition rate of nursing learners is the lowest among other schools in the OUHK. It is very stressful initially, and the drop out rate is usually high in the first year of study' (Mr. Y).*

*'After the conversion course, some still continue their study in the OUHK to obtain a bachelor's degree. In fact, they can choose to study in other universities... Despite the hard work and the difficulties, they are psychological prepared. Probably, the bachelor's degree course has lesser assignment than the conversion course' (Mr. Y).*

## Conclusion

There are many learning opportunities in adulthood, which is a time of growth and change, and learning may be affected by adverse (e.g., unemployment) and positive changes (Merriam and Caffarella 1999). Learning involves the reorganisation of experience; however, how an adult embarks on this new learning—wholeheartedly, half-heartedly, cynically, anxiously, or reluctantly—is a major factor in determining whether learning will be successful or not. Moreover, the learner must become autonomous (Chan 2001).

Most of the problems encountered by the respondents were about learning in terms of knowledge (i.e., language), skills (i.e., writing skills and time management), and attitudes (i.e., personal attributes and self-discipline). Adult learners who face problems, including problems with self-confidence (e.g., not confident in studying, no encouragement from others, too old to study, and inadequacy of educational background) and courses (e.g., no suitable course and courses are not useful), are barred from taking CE (Chan and Holford 1999). The respondents asserted that formal studies are not easy for adults who have many commitments and responsibilities, particularly, financial and family responsibilities. The respondents showed resilient personalities, and they were good at adapting to and at facing

difficulties.

Further, learning is viewed as a lifelong and committed process. The respondents demonstrated their great efforts (perseverance) more than their learning abilities. To promote lifelong learning, learners need to learn not only what should be learned but how to learn it (Chan 2001). Therefore, the commitment and the willingness to pursue lifelong learning rests on meta-learning. The term meta-learning is used to describe learning how to learn and learning about learning (e.g., individual styles of learning, strategies used, and systems to support learning). Individual learning always takes place within a context, involving processes (Askew and Carnell 1988), and learning about learning is essential for effective learning.

#### 4.6 Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

For E814 learners, reflection and critical thinking were not new or unheard of.

*'Reflection helps us to learn from experience' (J's tutorial feedback).*

*'I came across the notion of experiential learning and learning from reflection when I studied for E806. The process of reflection is essential in violin learning, as one needs to critique and to analyse one's own playing in order to improve' (N's reflective journal 1).*

The respondents were good at recalling ‘factual information’ about reflection and critical thinking, which they learned before or after the course.

*‘Critical thinking is not just understanding what is being taught but is also challenging the discourse of learning’ ( Subject A).*

*‘Critical thinking means questioning the assumptions behind what others have written or said’ (Subject B).*

*‘Critical thinking is important for adult learners because changes are lifewide. Lifelong education is necessary to modify perspectives in time’ (Subject C).*

*‘Critical thinking raises my ability to critique educational and school policies’ (Subject F).*

*‘Critical thinking can foster learning’ (Subject I).*

*‘Critical thinking is the ability to evaluate or judge right or wrong, judging whether it is suitable or not suitable when facing an open question or problem’ (Subject N).*

*‘Thinking critically is important in the process of reflection and therefore in a learning society’ (Subject M).*

Without doubt, the respondents had some pre-requisite knowledge about reflection and critical thinking. However, they forgot about and showed difficulties in applying reflection and critical thinking. Evidently, they needed clarification in and guidance on the concepts and practice of reflection and critical thinking required in the course work.

*‘I would like to thank you for your helpful tutorial today. They*

*guided my thoughts in learning, critical reflection, and journal writing immensely' (C's e-mail).*

*'After tutorial 2, I had a better understanding of reflection. Group members sharing their real experience helps to clarify the use of reflection in the process of learning' (K's tutorial feedback).*

*'By the way, did you receive my first reflective journal that I sent through e-mail a long time ago? I am in the habit of writing journals and have never done such exercises. I wonder if it was done properly. Attached here is the second piece of my reflective journal. Please comment' (N's e-mail).*

The application and practice of reflective and critical thinking while attending tutorials and writing reflective journals/TMA produced negative feelings among some course members.

*'No one dared to talk much about their reflection in the tutorial. It is so private and so anti-cultural to talk about' (C's Tutorial 2 feedback).*

*'When I attempt to write journals and do TMAs, I become frustrated because I have no idea on how I should reflect. Should I reflect on the things I have learnt in tutorials? Perhaps, it is a very silly question... I try my best to understand what the authors discuss. I have the tendency to accept what the authors discuss as long as what they talk about is logical and reasonable' (I's reflective journal 2).*

*'I find the concept of reflection and critical analysis/ thinking very abstract and difficult to put into practice' (Tutorial 10's feedback, anonymous students).*

*'Critical thinking seems an easy issue but is actually a*

*complicated one' (M's tutorial feedback).*

The respondents understood that learning in life cannot take place without reflection. They realised that it is essential to reflect upon our 'experience' for personal improvement and for solving problems in daily life. Reflection helps learning by gaining a better understanding of and by creating knowledge. Lifelong learners must put them in place. Generally, learning only occurs when we challenge meaning and reconcile new ideas with the presuppositions of prior learning, and when we act on these insights (Williams 2001). Reflection itself is not new to education and training; reflection is central to modernity (Edwards 1998). Further, reflexivity is integral to modernity (Giddens 1991). However, reflexivity has been radicalised by the amount of information available, by the media through which it is disseminated and constructed, and by the range of options over which certain decisions can and indeed have to be made.

*'Reflection is using one's own knowledge and experience to understand situations and to solve problems' (Subject B).*

*'Reflection is a very important process in learning. Learning and reflection are two interrelated matters, as we learn, we reflect what we have learnt. During reflection, we can further learn' (Subject I).*

*'Reflection is a kind of learning from experience. People also have their basic knowledge as the foundation for reflection. Learning is a process of knowledge acquirement' (Subject F).*

In Hong Kong, the application of reflection and critical thinking in lifelong learning is less possible and practical. Hong Kong learners tend to find difficulty in the process of critical analysis and reflection, leading to problems in forming their own conclusions (Venter 2002). The present educational system (traditional didactic teaching) and the Chinese culture make the cultivation and development of reflective and critical thinking skills and abilities difficult. These problems should be addressed in the early learning experiences of students. However, it is inappropriate to generalise that students from Confucian cultures (e.g., China, Korea, Japan, Hong Kong, and Singapore) “rote learn and lack critical thinking skills,” although such is indeed widespread (Biggs 2003).

Learning experiences gained from previous formal schooling, which emphasises teacher-centred rather than student-centred pedagogy, make us more ready to accept the passive way of learning. This passivity directs our future teaching and learning orientations. In Hong Kong, students are used to being spoon fed and are not accustomed to exploratory and analytical learning (Venter 2002). Instead, they are accustomed to a very directed learning approach (Biggs 2003).

*‘I have been accustomed to the mode of direct teaching for the longest time. Direct teaching is used in the highest sequence as far as I can remember. The teacher is the higher authority and a student’s responsibility is to pay attention and to learn from*

*what is taught. My teaching strategy is influenced by the methods used by my teacher who taught me. It seems that I took the role of information transmitter to my class wrongly. I was never an active participant in group learning sessions' (A's reflective journal).*

*'Before studying at the OUHK, my experience of learning (primary and secondary school and as an undergraduate in the university) is mostly "teacher-centred". The teachers gave lectures on what they thought the learners should learn' (B's TMA 1).*

*'Banking education that Freire criticised the most is common in Hong Kong. The trainings were mainly job-oriented and non-reflective learning' (M's TMA 1).*

*'The teaching style of a teacher is learned from experience, which is very specific compared with the lessons in experience and learning outcomes...' (O's TMA 1).*

Among Hong Kong students, the Chinese culture of obedience is evident. This, however, is an arbitrary and controversial observation. There is a perception that the Chinese learner is more comfortable in a didactic teaching environment. The Chinese learner is passive rather than participative, and he/she is more likely to utilise rote learning and memorisation (Robison 1998). However, although cultural values can be considered important, learning involves a complex interplay of factors (Venter 2002). Moreover, it is not the case that certain learning styles are inappropriate in Asian cultural contexts.

*'... the Confucian tradition and the Chinese culture that teachers should always be respected and students should not*



*challenge the teachers ...' (B's TMA 1).*

In the post course evaluation, E814 course members found that the course helped them apply reflection and critical thinking. They agreed that critical thinking is useful in learning. There are five concepts in person-centred learning: (1) the emergent design of the course process; (2) interdependence or a supportive climate; (3) a reflective, creative, and open-ended knowledge system; (4) reflection; and (5) critical self-assessment (Maclean 1987). The contemporary world brings not only the commodification and the domination of techno-scientific instrumental rationality but also opens up possibilities for individuals to reflect critically on these changes and on their social conditions of existence, hence potentially changing them (Larry and Urry 1994).

*'The good thing about this course is that it includes reflection in learning and opportunities for critically evaluating the education policy' (Subject A).*

*'I find "reflection" to be most useful' (Subject F).*

*'I have no interest to study in primary and secondary schools. Formal schooling is dominated by parents; there is no critical thinking there. After studying the M.Ed, I had more opportunities to think' (Subject R).*

*'Learning should be reflective. You should not only learn the course content, but you should also know how to write argumentative and insightful essays' (Subject T).*

Mr. X was critical to this issue. He said that critical thinking is important in lifelong learning; however, one should be more critical to social norms. Like the course members, he attributed the problem to Hong Kong's culture. The cultivation of a reflective attitude depends crucially on how knowledge is presented by a teacher to the learners (Claxton 1996). Knowledge may be presented as if it was established to be universally and incontrovertibly true or conditionally true, and learners are implicitly led to engage in learning strategies that simply record this knowledge.

*'E814 wants the course members to view and learn every piece of information with a critical mind, not in a passive way like a sponge absorbing everything. They need to think critically to learn. Adult learning needs critical thinking and reflection to integrate life and learning. Life is learning. To decide what to learn and what is important to oneself all depends on critical thinking and reflection. Besides, without critical thinking and reflection, people will repeat their own experience without any change and learning' (Mr. X).*

Mr. Y also shared a similar view. He was pessimistic about putting critical thinking in place. Accordingly, critical thinking is easier said than done. The promotion of critical thinking is simply a lip service and is not an actual practice in daily life.

*'Critical thinking is for talking. In our generation (about 30-40 years old), we usually lack this kind of training. People with Ph.D. can have this kind of training. Under colonialism, education was spoon fed. From kindergarten to secondary schooling, we learnt what we were told without questioning, which did not help in cultivating critical thinking. When we grow up, we become obedient. How would a rubbish degree*

*course help in the training' (Mr. Y)?*

*'Critical thinking is simple: What? Why? How? Now, people are still not sensitive to "What". Yet, tertiary education tries to promote critical thinking, but it is very difficult. I have a duty to inform students about critical thinking, but I am not sure they will practice it. It is "life's challenges" that change oneself and the people around' (Mr. Y).*

Mr. X commented that OUHK learners do not possess enough critical thinking in learning and in living.

*'I am not satisfied. Although tutors will stress on critical thinking, I can only see superficial changes rather than in-depth or radical changes. The atmosphere of critical thinking to solve a social problem is lacking. E814 alone cannot do anything except some improvements in the assignment' (Mr. X).*

*'In the past, during the examination, you just give what you have learnt. Now, you need to search for materials and information and to share your opinion' (Nurse e).*

*'Critical thinking should be learnt in tertiary education. Critical thinking helps examine things from a broad and in-depth approach rather than from the surface approach, review knowledge critically, and create knowledge' (Nurse c).*

*'Critical thinking can help me think about the causes and reasons, and understand the reasons/agenda behind everything. I should not believe everything what the in-charge says' (Nurse k).*

*'I have not learnt critical thinking before. I know that I am no longer allowed to copy from the literature in undergraduate courses. Yet critical thinking can help me not to be obedient at work' (Nurse l).*

## Conclusion

The use of meta-cognition spells the crucial difference between school and everyday learning (Biggs and Watkins 1993). Meta-cognition simply means that we reflect critically on what we are doing to help us cope with new and complex situations of all kinds. Increased emphasis is given to practicing reflection in learning and to its potential relationship to workplace practices on reflective modernisation (Edwards 1998). The concept of a risky society is linked to reflexive modernisation (Beck 1992). The process of modernisation has produced risks, which are no longer limited by time or space. Risks are spread globally. Reflexive modernisation refers to the modernisation of industrial societies and attempts to challenge the structural assumptions and consequences of the risks produced by modernisation. Learning the skills of critical thinking is necessary in tertiary education. The respondents were excited about and positive in learning critical thinking in their academic studies, yet they were weak in linking theory to lifelong learning practice. They also cast doubts over its applications in real life. The importance of reflection and critical thinking in lifelong learning is obvious in day-to-day learning.

However, the informants failed to show reflection and critical thinking as their prime concern in lifelong learning. Indeed, quite a number of Hong Kong people, including

university graduates, are not good at projecting their awareness of reflection and critical thinking. The respondents were used to the teacher-centred pedagogy, and they adopted the thinking and approaches of their teachers. It is also difficult to change. Students believe that teachers are supposed to give leadership and to draw matters to the correct conclusion (Biggs 2003). During their initial stages of learning, the majority of Hong Kong distance learners feel that they need to find the source that holds the right answers (Venter 2002). By the end of the course, the respondents reported that their attitude had changed—their thinking was challenged and their learning approach was modified.

#### 4.7 Why did people choose the distance learning mode?

Hong Kong has various methods in delivering educational programmes. The OUHK offers an open, distance, and flexible mode of learning, which provides incentives to learners. Pure distance learning (where there is no physical presence of an overseas institution) is exempted from local legislation, which controls overseas programmes. In Hong Kong, funds and manpower are usually locally sourced to provide distance learning materials, and there may be visiting academic staff from overseas. The case is usually a combination of both. Moreover, Hong Kong learners prefer face-to-face support.

*‘There is both distance and open learning modes in the OUHK. In Hong Kong, travelling is quite convenient. We have the MTR system that makes distance to and from any learning institute not a big problem. Open learning can remove barriers, not just travel/transport but time and self-paced learning as well (you can finish your own course at different speeds anywhere, say, at HOME). To a greater extent, although under some administrative constraints, open learning allows you to decide WHAT to learn and WHEN to submit your assignment without any ENTRY REQUIREMENT (with some exceptions, such as the entry requirements for B Nursing and B Education). Distance learning is about self-learning. Learners are given course materials, but they do not need to attend any class. They can also pace their own learning’ (Mr. X).*

*‘Not attending class is an incentive in studying in OU, but it is not a very attractive one. It depends on learners’ learning skills or learning styles. Some learners may prefer self-learning but some don’t. Learners like attending class because they can expect the pressure of learning and classroom interaction. Hong Kong students are more accustomed to classroom teaching that I am puzzled why so many people would still like to enrol in the OUHK’ (Mr. X).*

*‘Without any empirical data, I think that the competitiveness or attractiveness of the OUHK lies on a) open entry and b) distance learning’ (Mr. X).*

Open learning provides learners with second chances and an alternate access to learning, which is likely a difficult path.

*‘The OUHK advocates Education to ALL. There are no requirements. You can be admitted if you can read and have an identification card. This offers a “channel” and a second chance for those who fail to get tertiary education... But this is not an easy route’ (Mr. Y).*

Flexibility suits adult learning.

*'The OUHK adopts the concept of andragogy; learning should be self-paced and tailor made. One can finish a degree in 6 or 10 years' time... according to one's need' (Mr. Y).*

*'Learners can study at home, and there is no need to go to campus. In the OUHK, there are face-to-face sessions such as tutorials' (Mr. Y).*

The respondents chose to study at the OUHK because of its open learning mode rather than its distance learning mode. It was the open learning mode that apparently broadened their participation in lifelong learning.

*'I came to class after reading all the necessary materials... I was confused how a course can satisfy such a diverse student background' (C's tutorial 1 feedback).*

*'After the first tutorial, I learned that the participants of the present course came from all walks of life. Some were teachers or educators, but I was surprised to see someone from the business sector; if I remember correctly. I am a classical musician, and I also consider myself a music educator' (N's reflective journal).*

According to the nurse respondents, the OUHK offers ENs access and opportunities to upgrade themselves on a part-time basis; hence, they need not resign from their current jobs. The OUHK offers not only courses but also hope to learners (i.e., ENs) who have long been neglected and deprived of learning opportunities.

*'In the past, there was a Mature Student Scheme that allowed ENs to attend Nursing Schools of the Hospital Authority, but these places were scanty and were not easy to get into' (Nurse e).*

*'Studying in the OUHK is good. You can study and work at the same time. It is not necessary to resign, and you need not pay HK\$200,000(including fees and salary reduction during a 10-month practicum period)' (Nurse e).*

#### 4.8 To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

The respondents chose to study through the distance and flexible learning mode at the OUHK because they lacked time to attend formal classes. The distance learning mode and the flexible structure of the courses facilitate individual and personal learning projects in life. Therefore, for students, open and distance learning means increased access and flexibility, as well as the combination of work and education (UNESCO 2002).

*'The traditional mode of learning is absolutely not suitable for my situation. Conflict in time will make me not consider studying more. However, the distance mode of learning in the OUHK allows me have an opportunity to plan my learning in a flexible time. I can manage my time among my job, my family and my studies. The mode supports my professional development and self-enhancement according to my life schedule' (P's TMA1).*

*'I took an HKU postgraduate course. Going to classes twice per week was very exhausting. For those who work in business for over 12 hours per day or travel around the world, how can they manage to leave the office before 6 pm twice per week' (J's reflective journal)?*

*'Studying at the OUHK is a distinctive mode of education that*



*differs from my other tertiary education experience. The nature of distance learning breaks geographical barriers and allows more time flexibility. Only distance learning offers such flexibility, as I can study at my own pace. It is true that tuition fees are not affordable to a considerable portion of the community' (N's reflective journal).*

Flexible formal studies that meet the pace and needs of learners are attractive.

*'I can finish the three subjects of M. Ed in my own time, and comparatively I feel less pressured with having fewer formal classes' (Subject R).*

*'I study at the OUHK because there is no need to attend regular lectures. This is less troublesome to me. The flexibility it offers allows working people to study while maintaining their commitment to their family and their work' (Subject V).*

*'Some course lectures are quite intensive at three times a week...It was too harsh. I would like to have control over my learning process and pace' (Subject T).*

Formal studies with little or no restriction help increase opportunities for learning.

Hong Kong's distance and open education programmes are made available through structured learning texts along with other media and some tutorial support generally in an open access basis. In this way, adult students can start upgrading their formal qualifications, and they are given the opportunity to proceed further, provided that they have the ability to progress towards a degree or beyond (Cribb 2002). Sir John Daniel, former Vice Chancellor of the OUHK, said that distance learning is a major mode of study for lifelong learners. Not only are there many hundreds of thousands of

students in the distance learning-based mega-universities (11 institutions around the world), but their numbers are increasing in programmes developed by traditional universities (Jegade 2001).

*'I am not a teacher, but the OUHK allows me to study an education programme' (Subject S).*

However, learning and supporting facilities are comparatively far from adequate at the OUHK. Apparently, informants were inclined to compare the OUHK with other full-time tertiary institutions. This suggests that they were not ready to accept the teaching mode at the OUHK. Probably, the supposed strengths of the OUHK have become its weaknesses—they being two sides of the same coin. A study in Hong Kong, Malaysia, and Singapore found that most students do not choose distance learning as their preferred mode of study. 'They prefer full-time, class-based situations in which the teacher would cover the concept, direct them to specific sources, and tell them what information to look for and be there to provide immediate feedback to questions' (Hills 1998).

*'The facility supports such as a library, leisure activities, lockers... etc. to students are not adequate. Taking the E814 course is my first time in accessing the Open University and open learning. What I have experienced is that the resources of OU are lesser than those of other universities' (E's e-mail).*

## Conclusion

In the pursuit of lifelong learning, the open and flexible learning mode appealed to the respondents. Most importantly, this study found that open learning provided the respondents not only an alternative access to increase and widen their participation in lifelong learning but also a second chance to realise their dreams in learning and career advancement. Flexibility in the course structure and logistic support allowed them to study in a formal course despite their busy socio-economic lives.

### 4.9 In what ways should the Hong Kong government influence the development of lifelong learning?

In the pre-course assessment, the respondents thought that the government should play a major role in providing support for lifelong learning, such as through incentives (advantages) and funds. They assumed that in response to changes, it is the government's duty to take a leading role in supporting lifelong learning. Hong Kong's high ranking officials, such as Education Secretary Michael Suen (2009), repeatedly assert that education is where the future of our society lies, and it involves a huge investment of public resources. The Hong Kong government has always attached great importance to education, and tremendous efforts and resources have been devoted to cater to the needs of our knowledge-based economy. However, the role of

individuals in lifelong learning should not be forgotten. Some UK government publications (NCVQ, Department for Education and Employment) put emphasis on the link between lifelong learning and self-directed approaches to learning (Malsin-Prothero 1997). Individuals should be responsible for their own learning and career development. Further, self-directed learning is more cost effective, and it encourages more student autonomy compared with the more traditional approaches to learning.

*'During the early 1980s, there was less support from the government and working organisations. Not many programmes were available for post graduate level learning from educational institutions' (B's TMA1).*

*'The current trend of education and training is to ensure that all employees have the necessary competencies to meet new demands (technology and information advance) in their longer working lives, thus the growing importance of lifelong learning. Lifelong learning itself will then demand continuous development of skills, knowledge, and attitudes needed in working life, particularly for new ways to organise learning in and outside the workplace' (L's TMA 1).*

After the course, the theme of a learning culture emerged, and a change of attitude about lifelong learning was suggested. Based on the reports of the EC and the OECD (1994), there are two broad areas of choice in the adoption of lifelong learning policies (Tuijnman 2002a). First, there is a need to improve the articulation of education, training, and employment policies under the framework of lifelong

learning, and to devise more effective implementation strategies as part of a coherent approach to a range of policy areas that include the labour market and social insurance policies. Second, there is a need to achieve higher standards of learner attainment and greater efficiency and effectiveness in the organisation of education production under the framework of lifelong learning. In other words, the respondents, before attending the course, demanded concrete materials and social and labour policies on lifelong learning. Afterwards, they longed for a bigger change in culture. Lifelong learning values and attitudes are as important as lifelong learning skills and knowledge (Longworth 1999). A learning community, whether it is a city, town, or region, tries to inculcate into its citizens the values of cooperation and harmonious living. Advocating lifelong learning in schools and in the community will help in the development of Hong Kong as a learning society (Chan 2001).

*‘The government should put more efforts using more flexible policies for learners, such as funding assistance. Private organisations should provide funds for learning and encourage communities to practice (possible qualification for non-formal and informal learning)’ (Subject B).*

*‘Widening the participation can help lifelong learning become developed in Hong Kong’ ( Subject E).*

*‘Learning to be, learning to know, learning to do, and learning to live together are the important factors of lifelong learning’ (Subject F).*

*‘Financial support from the government can help develop lifelong*

*learning in Hong Kong' (Subject H).*

*'Lifelong learning should be developed in schools and colleges' (Subject J).*

*'Exploring the barriers and establishing policies can help develop lifelong learning in Hong Kong' ( Subject M).*

*'To promote the advantages of lifelong learning, financial and cultural support from the government is also important' ( Subject N).*

*'The motivation of lifelong learning, the ways to achieve learning, government policy, and social and economical issues are important factors to develop lifelong learning' (Subject O).*

The respondents thought that the provision of courses, such as E814, is helpful in widening their opportunities for lifelong learning.

*'The weaknesses of the course are that there is NO definite model of lifelong learning' (Subject B).*

*'The strength of course is to have a holistic picture of lifelong Learning' (Subject F).*

*'One of the strengths of the course is to make use of the experiences, work, and lives of diverse communities in organising lifelong learning perspectives and to enhance and support those perspectives. I find this perspective on learning useful' (Subject H).*

*'The strength of the course allows students to realise how learning can be perceived. I find this perspective on learning most useful' ( Subject I).*

Although the respondents studied to obtain qualifications, by their observation and clinical experience, they realised that a certificate itself does not actually reflect one's performance and ability. Actual learning should not be measured by qualifications alone. For instance, the UK urges that education must provide nurses with a firm foundation that they, as lifelong learners, can continue to build throughout their professional careers (Rushforth and Ireland 1997). While a policy of gradually expanding enrolment and of improving the quality of formal education is wanting, new technologies tend to shift emphasis to work organisation and job content (Tuijnman 2002a). There is a major educational challenge to upgrade and broaden substantially literacy and qualities, such as interpersonal skills, problem-solving skills, initiative, creativity, and openness to change. The government should achieve higher standards of learner attainment and greater efficiency and effectiveness in the organisation of educational production under the framework of lifelong learning.

*'Today, university nurse graduates do not perform well.  
Certificates are nothing at all' (Nurse e).*

Learning for examination (the syllabus or task-oriented approach) is quite common in Hong Kong schools. However, it poses a problem to lifelong learning development. This kind of practice obstructs the critical thinking and creativity of students, as well as their all around learning experience. Learning should involve meaning, understanding, and a way of interpreting the world (Biggs and Watkins 1993). Such

concept is implicit or explicit in most official statements on the aims of schooling. Promoting independent learning and critical thinking are also the major goals of university education (Kwan and Ko 2004). Elements such as self-initiative, critical thinking, and meta-cognition should be emphasised.

*‘From my learning experience, it seems that well-rounded development is absent, while lessons only focus on the syllabus of the public examination. The teachers themselves are not accustomed to be the facilitator of contextual constructive learning. Without experience in student-oriented, constructive learning, it seems that lifewide learning should better be introduced to the teachers beforehand’ (A’s TMA 1).*

*‘Hong Kong students are crammed with exam materials that will be forgotten right after the public examination ends. There is much to do to change the present situation. One of the issues worthy of attention to is to get our students ready for lifelong learning’ (K’s TMA1).*

The idea of lifelong learning should be introduced to students as earlier as during the formal years of education to allow the seeds of lifelong learning to grow and thrive. Going back to the basics, the fundamentals of lifelong learning as underlined by Delor—“learning to learn” and “transferable skills”—should be emphasised. For example, in Hong Kong, the EC (2000b) is committed to the development of students’ generic skills, such as IT literacy, numeracy, and the abilities to solve problems, to make decisions, communicate effectively, and work as teams.

*‘Lifelong learning should start as early as in the secondary level of education. How should secondary students for lifelong*



*learning be prepared' (K's tutorial feedback)?*

In addition to the current instrumental approach, the government should integrate the humanistic approach in promoting lifelong learning. The UNESCO envisions (Faure et al 1972) that lifelong learning is about a more equitable distribution of educational opportunities based on a humanistic tradition, leading to positive social and individual benefits.

*'The government has been advocating for people to pursue lifelong learning for economic growth, competitiveness, and prosperity. However, under the market-led education policy, the rich become more knowledgeable than the poor, and leisure time learning is comprised. Similar events occur in other countries. Individuals can do nothing about this, but the government can. However, unlike other places, Hong Kong has no advocates to voice out the different views on lifelong learning. In Hong Kong, majority of the people accept the current practice' (Mr. X).*

However, Mr. Y argued that in Hong Kong's knowledge and economy-based society, qualifications are more important than experience.

*'In this knowledge-based and economic society, one's career advancement cannot only rely on experience. One needs a ladder to climb up on... Credits Accumulation Transfer can help experience to be recognised... Academic course can help you ... This is how lifelong learning is recognised' (Mr. Y).*

*'A clerk may not have career advancement, but he/she can still pursue lifelong learning, such as bowling, archery, and swimming, to receive a certificate for different purposes' (Mr. Y).*

In Hong Kong, there are pros and cons to be considered when promoting lifelong learning through distance and open learning at the OUHK.

*'The OUHK is relatively a new institute in Hong Kong, but its quality of education is guaranteed' (Mr. Y).*

*'OUHK's flexibility and open learning mode attracts people who are busy and who work at irregular hours' (Mr. Y).*

In terms of comprehensiveness, distance and open learning is doubtful because of its limited supporting facilities and in-campus social life compared with traditional settings.

Campus life, which is a way of social learning, is not available in part-time learning.

The preparatory programmes for first-year students have been popular in the US and elsewhere (Kwan and Ko 2004). These programmes have positive effects on students.

For instance, they improve students' involvement in university life and their interaction with faculty members. Moreover, they lead to higher passing and retention rates. Distance learners express a preference for full-time, classroom-based teaching in which the teacher explains concepts, directs them to specific sources, and provides immediate answers to questions (Venter 2002). As far as the ability of learners is concerned, Hong Kong students are usually characterised as hard working and diligent, although lacking in creativity and originality (Sweeting 1996).

*'Part-time study has its own function as well as limitation. The normal pathway of education provides something part-time study fails to provide, such as social life in campus. Learning happens outside the classroom' (Mr. X).*

The provision of distance and open learning to learners is limited because of the lack of financial support and of administrative constraints.

*'However, the competitive power of the OUHK is weak because the long working process fails to meet the immediate needs in this rapidly changing market ... Every course needs to go through the stringent quality assurance process, which usually needs at least one year preparatory work before launching it to the market' (Mr. Y).*

*'Distance and open learning mode has its own limits due to the limited services provided, market-led courses, learning not being a comprehensive full-time mode. I worry about the return of investment in distance learning courses. I am a bit disappointed by the performance of learners due to their poor time management and quality of study' (Mr. X).*

*'The OUHK is a self-financed institute, and its income comes from the students; thus, it needs to be market oriented. Further cost control is important when considering what kind of provision and service should be provided to students' (Mr. X).*

Employers look down on learners who completed their studies through the part-time mode. The worldwide public perception is that open and distance learning is of lesser quality than full-time in-campus education (Jegade 2001). Although employers are concerned more about one's abilities than one's efforts to obtain qualifications, many of the new jobs in the knowledge-based economy will require a good deal of formal

education (Tuijnman 2002a). Perhaps, more than qualifications per se, they will demand good literacy, numeracy, and problem solving skills, as well as the abilities to acquire and apply new ideas continuously and to use knowledge creatively.

*‘Employers tend to have more confidence on people who studied by the full-time rather than the part-time mode. Due to fierce competition in full-time education, employers believe candidates who have better quality and ability should be recruited for full-time tertiary education. Students successfully obtaining 7A’s and 10 A’s are not simply diligent and are putting in more effort in studying, but they also possess attributes such as personal skills, analytical skills, and time management skills’ (Mr. X).*

There is no guarantee for investments in learning.

*‘... although the qualifications provided by the OUHK are recognised by the Hong Kong government, I find that the OUHK qualifications do not enhance the graduates’ employment, except those who already have a job. Besides, neither would a clerk be promoted to become an executive after finishing the degree nor a bachelor’s degree or MBA holder be promoted to a managerial position. The situation may be applicable to other institutions’ (Mr. X).*

*‘... I noticed that some of the incompetent graduates are those with higher qualifications. When selecting a potential employee, employers would usually take a broad approach, considering not only qualifications but also interpersonal skills, problem solving skills, and overall abilities. Paper and pen examination and good academic results do not reflect one’s ability. Employers would consider both the certificates and the performance’ (Mr. X).*

Evidently, the quality of OUHK learners is not as good as before.

*‘I judge the quality of OUHK learners by their i) learning attitude, ii) background knowledge, iii) language usage ability, and iv)*

*learning ability. As a whole, I feel that the previous OUHK graduates were smarter than today's learners. In the past, due to the limited university slots and fierce competition, the incompetent ones who failed to gain access to traditional tertiary education were still comparatively better qualified and were the elite in certain degrees. While access to tertiary education has opened up, the quality of OU learners is falling. This may also be the problem of other tertiary institutions, I am not sure' (Mr. X).*

## Conclusion

Lifelong learning appears to have provided a solution to important concerns that Hong Kong has to address: to increase its economic potential; to make its political arrangement more equitable, just, and inclusive; and to offer more avenues for self improvement and personal development to all its citizens (Aspin and Chapman 2000). This study shows that the practice of lifelong learning among respondents is market driven. The respondents focused on the instrumental approach. We probably need evolutionary and transformative changes in knowledge, skills, and attitudes regarding lifelong learning in formal and post-formal schooling through the development of a learning community. To develop lifelong learning, the government should provide material support as well as ways to facilitate attitudinal and cultural changes.

The open and flexible mode of learning was important in encouraging the lifelong learning of the respondents. Indeed, the study indicated the shortcomings of open and

distance learning at the OUHK, such as the ineffectiveness of part-time learning when the holistic development, campus life, and the ability of learners are considered.

Apparently, data show that lifelong learning through the distance and part-time learning mode is by no means easy. An active role in learning at the OUHK is slightly difficult for learners who are well adapted to spoon fed education, those who lack time and self-discipline to study, and those who have inadequate face-to-face contact with tutors who can explain the learning materials. Learners who want to get a “pass” at the end of the study choose a quick and easier approach to learning— superficial and instrumental learning—which they are accustomed to because of their previous experience in formal education. This gives rise to concerns in the quality of learners. It poses problems not only to employers but also to tertiary institutions, as many learners are attracted to study at the OUHK. Moreover, this phenomenon supports the “declining standards argument” invoked in relation to CE (Kennedy 2002a). In addition, the crucial role of the teacher in distance learning is to facilitate the development of self-understanding, allowing each learner to develop an approach that suits the social and cultural contexts where he/she is in, the learning content, and his/her own characteristics (Venter 2002).

## Chapter Five: Part (I) - Case Studies

### Introduction

This section first provides qualitative data from eight case studies (Cases A to H). These cases dealt with the lifelong learning histories and experiences of the E814 participants (2004-05 intake) obtained through individual interviews. This section also presents the reflections on the personal experiences of the author (Case I).

It is worth noting that during the analysis of the transcripts, a misunderstanding over the term “distance learning” between the researcher and the interviewees arose. In such occasions, the researcher underscored the differences between the OUHK and other conventional tertiary institutes in terms of programme instruction, as well as the significance of such differences. In the OUHK, there is less face-to-face teacher-student contact. Apparently, the interviewees were confused by the concepts of distance, open, and flexible learning.

### 5.1 Subjects and Strategies

Core data were collected from E814 learners (2004-05 intake). Eight individuals (A-H) attended individual interviews, which were conducted from August to November 2005. The interviews examined what they did in the past and what they would do in the future to pursue lifelong learning. Some of them provided data (i.e., those found in

the previous chapter) through course work activities, such as reflective journals, e-mail exchanges, tutor marked assignments (TMAs), and pre- and post-course evaluation questionnaire surveys.

Gender (N = 8)		Age				Qualifications	
Male	Female	21-30	31-40	41-50	51-60	Bachelor	Master's
4	4	1	3	3	1	8 persons	3 persons
Respondent	Occupation	Sex	Age	Qualifications			
A	Teacher	F	21-30	Bachelor of Economics			
B	Trading manager	M	41-50	BBA, MBA			
C	Instructor	M	41-50	Bachelor of Mechanical Engineering Bachelor of Education			
D	Teaching assistant in a primary school	M	31-40	Bachelor of Mathematics Master of E-commerce			
E	Building technician	M	41-50	Diploma in Construction Post graduate Diploma in Management LLB Master of International Business Master of Chinese Law Master of China Area Studies MSc in Construction Management			
F	Teacher	F	51-60	Bachelor of Language in Translation			
G	Clerk	F	31-40	Bachelor of Language			
H	Vocation education	F	31-40	Bachelor of Computer			

Table (IV) E814 (2004-05 intake) Interviewees

Findings:

**Subject A**

Subject A was a young female, aged 21-30. With a Bachelor of Economics and a Diploma in Education both from the University of Hong Kong, she taught economics in a secondary school while taking up Master of Education (part-time).



a) What does lifelong learning mean to OUHK learners?

As a young graduate teacher, her so-called lifelong learning experience was her formal education. Formal education, which is provided by the government, plays a significant role in early lifelong learning experiences. There are different milestones in formal education, which become personal landmarks and achievements in lifelong learning. Inevitably, early lifelong learning experiences are dominated by examinations. Subject A was aware that lifelong learning goes beyond formal and compulsory learning.

*'My learning journey involved finishing kindergarten, primary and secondary schooling, matriculation, and tertiary education. Of course, this involves going through all the necessary examinations'.*

For Subject A, lifelong learning is a specific term referring to learning after schooling. Moreover, the contents of lifelong learning are job or career related. The contents are more interesting than those of formal education, and the responsibility for learning rests on oneself. Indeed, learning is not a passive process (Stoll et al. 2002). It is an active, dynamic process that requires individual (as well as social) effort and energy.

*'In the past, I was forced to study. Today, I study to meet my deficiencies. I think that my lifelong learning began when I started working'.*

*'Today, I study for interest and job/career. I studied for a Diploma in Education and in the M. Ed. programme for formal qualifications. It is for my teaching career (job seeking and*

*promotion). Informally, I prepare for my teaching career by reading books and by getting examples from newspapers and TV documentaries’.*

Lifelong learning is about learning throughout life. It involves formal learning through which qualifications are sought. Lifelong learning is also a learning process that applies knowledge in real life situations. Typically, we think of learning as the deliberate acquisition of skills or knowledge (Hallam 2007). Subject A brought out an important issue in lifelong learning. She asserted that learning could not take place in a vacuum. Knowledge without application makes learning difficult. Information becomes knowledge when it is shaped, organised, and embedded in some purposeful contexts (Stoll et al. 2002).

*‘Teaching is about experience, not just about qualifications. After completing my M. Ed., I will stop studying for about two years so that I can gain some more working experience’.*

*‘After graduation from the university, I studied for a Diploma in Education (full-time). However, I found the course to be unhelpful. I particularly enjoy my teaching practice, which is the “real battle field”. It provides life experiences’.*

b) What motivates students to engage in lifelong learning?

For Subject A, people pursue formal learning simply for practical reasons: to prepare and equip them for the challenges that arise from job and career advancement. In taking a CE course, the primary motivation of Hong Kong adult students is to acquire new skills for the changing workplace (Chang and Tam 1997). Central also to the

conscious and unconscious selection of what to attend to and what to learn is the self (Hallam 2007).

*'In my school, teachers would study for a Diploma in Education for the subjects they are teaching or simply for a Master's in Education. Lifelong learning is quite career-oriented'.*

*'In professional teaching, a master's degree is necessary at the moment. Because of the educational reforms, subjects such as economics and history are no longer treated as important subjects like Liberal Studies. Therefore, under peer influence and government policy, I will consider studying Liberal Studies later so that I can teach the new subject'.*

c) What deters students from engaging in lifelong learning?

As a woman, family commitment was important to Subject A. In fact, it stopped her from furthering her studies. Accordingly, studying seems more favourable to young and unmarried women.

*'Learning should happen at a younger age. I will treasure any chance to learn when I have more time and I have no family burdens. If I have a family, I would defer learning. My mother showed me a good example--family comes first. My mother chose to take care of her two young daughters (me and my sister), and she gave up any opportunity to study, opportunities that are favourable to her promotion'.*

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

Formal education, which stresses on examination results, may lead to a learning culture that emphasises the outcomes of learning (results) and that pays little attention to the process of learning and the interests of learners.

*'Due to my interest, I studied economics in the University just because I got good results in economics at A-level and school certification examinations. When I studied in the University, I studied to pass the examinations, but I felt that it was not in-depth enough'.*

There are schools that still adhere to the examination-oriented approach, making educational reforms for holistic learning and development difficult. Studying for academic results is still the mutual goal of schools and students.

*'My studies and my thinking were only one way and were not comprehensive enough. Learning was didactic and exam oriented. Today, the emphasis is on learning through activities'.*

*'Although authorities are calling for extra-curricular development, schools are concerned about academic achievement. In view of the low birth rate crisis in Hong Kong, students' academic achievement, one of the most reliable performance indicators of schooling, is used to attract potential students'.*

The lack of time to read course materials poses a serious problem to part-time and distance learners, leading them to adopt superficial learning rather than in-depth analysis as a learning approach. Hence, the quality of learning is compromised.

*'I am too busy to read course materials, as I usually have long working days —more than 10 hours a day. I leave school at 6-7 PM everyday. I can spare no time to study or read before the tutorials. Therefore, I cannot participate well in the tutorial discussions'.*

*'When I read materials, I just read the headings and then use them in writing assignments. I hastily complete my assignments. After the examination, I would wonder about what I have learned from that module and what I got from it. I regret what I did during my studies'.*

Subject A was asked whether other people she knew behaved similarly and if this is the trend of learning at OUHK. Is it common for students to study only in order to complete the assignments and to pass examinations?

*'I have no friends in the OUHK, so I cannot tell what other OUHK learners do. My friends, colleagues, and previous classmates study on a part-time basis, and they are concerned with the quantity rather than quality of learning. With the so-called non-stop learning, they keep on studying courses one after another'.*

Learning on your own and learning without prior knowledge and application are not easy tasks.

*'Due to my interest, I initially studied E809 (Teaching English to Speakers of Other Languages, one of the elective subjects in the M. Ed. programme) with interest. I thought that this subject would help me to teach "English" and to upgrade myself. Later, I lost interest in it because the subject had nothing to do with my day-to-day life. I was unable to apply the methodologies when teaching other subjects, especially economics'.*

Ways must be found to support and facilitate individual lifelong learning, and to maintain the interest of lifelong learners to study. Past successful learning experiences and academic achievements are apparently important to sustain the pursuit of lifelong learning, although this personal experience is not applicable to all. For instance, Subject A successfully overcame all academic hurdles to complete her tertiary education. When individuals commence a task, they form expectations about how well they think they will be able to carry it out. Such expectations are based on previous performance. This is known as self-efficacy (Bandura 1997).

*'In the first place, my lifelong learning experience came from my success in passing previous examinations. Interest and academic achievement in certain subjects made me keep on studying. Now, peer influence and the environment sustain my learning'.*

Peer and family support are key factors that sustain lifelong learning. Asked how she learned by teaching, she replied,

*'I learned from trial and error. For example, in classroom management, I learned how to manage loss of control. Sometimes, I would find ways to discuss with my colleagues, but it is a bit difficult. I prefer to learn from peers—my classmates in the Diploma in Education—because we have a closer relationship, and we can learn from each other in informal settings, such as at dinner time. Occasionally, I read books to improve my teaching skills'.*

Asked about her support system or about her lifelong learning when faced with difficulties, she claimed,

*'My family taught me that one should persevere and be consistent in doing everything. It is my duty to complete the course—as far as commitment and money are concerned. I sacrifice my sleeping time and weekends to study. When I do my assignments, I try to arouse and cultivate my INTEREST to learn... In my studies in the OUHK, I study by myself, ALONE. I don't get to know other OUHK students well because we don't meet with each other frequently. Besides, we seldom discuss our course materials and assignments together... I don't think that group learning in the OUHK is easy. It requires high motivation and more time'.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Critical thinking is believed to be important both in studying and in living, but it is

difficult to use it, let alone teach it. When asked whether critical thinking is important in lifelong learning, Subject A elaborated,

*'I agree with that. Critical thinking helps us reflect on the question and arouses our interest for discussion. I seldom use critical thinking, which I think is unnecessary. I study for "model answers" in the public examination (O-level and A-level). I can say that because if recitation works, then interest in studying is not lost. After studying M. Ed., I started thinking critically. I would think critically about my teaching experience: what I did right or wrong in the class, why the class went out of control, and what I should do in the class. I find that critical thinking is challenging and interesting to learn'.*

When asked about the difficulty in teaching critical thinking, Subject A replied,

*'I have tried to teach critical thinking but not frequently. From my observation, students actually have critical thinking. Although they have no interest in studying, they can still give creative answers. However, for the sake of examinations, teachers guide them towards the "model answers", killing their creative ideas or thoughts'.*

f) Why do people choose the distance learning mode?

[By distance learning, the researcher stressed the mode of delivery of learning in terms of the physical structure and the organisation of programmes or courses. In distance learning, there is less face-to-face teacher-student contact, and in comparison with conventional education, students take more responsibility in learning. This question intends to underscore the differences between OUHK and other conventional tertiary institutes, as well as the significance of the mode of instruction or learning in the OUHK. There are few and often no classes to attend in distance education. Instead,

students work through packages and assignments at their convenient time (Kember 2007).]

Subject A was probably confused by the concepts of open and distance learning in the OUHK. Indeed, distance learning is often confused with open learning (Holford, Gardner, and Ng 1995). First, part of the confusion arises from the many distance learning organisations, such as Hong Kong Open Learning Institute (now OUHK) and the British Open University, being called “open,” and they operate with open entry policies. Second, distance programmes are not so “distant” in Hong Kong, which is a small and densely populated city. In Hong Kong, “distance”, as applied to “distance education,” does not refer to differences in geographical location because most of the students are located within a radius of 50 kilometres from the university (Jegade 2001). The meaning of “distance” in this context is more of time than of opportunity to access the facilities and materials for study. Third, the OUHK does not clearly distinguish its peculiar status. The OUHK’s mission statement contains both elements of open access and distance education, making the OUHK an independent open university (Kember 2001). This reinforces the common assumption that distance education is synonymous with open entry.



g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

The programme delivery mode—distance learning—was not the reason why Subject A chose the OUHK. Open and flexible learning is important in lifelong learning. The OUHK not only offers recognised qualifications through formal education but also removes admission barriers and allows people to study at their own pace.

*'First, other universities require students to attend lectures, say, twice per week, which is very demanding to me. The time of study in the OUHK is flexible and suits my work. Second, in other universities, say CUHK and HKU, most M. Ed. students are teachers with years of experience in teaching and/or administration. It is unlikely that they will allow a young adult like me to enrol. Therefore, the OUHK is the place for me to attain qualification and recognition'.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

No matter what the outcomes are, the Educational Reform, which was initiated in 1998, helped cultivate lifelong learning among teachers and students.

*'Barring the forthcoming challenges, I'll teach economics and focus on improving my teaching skills or experience. Most of my colleagues live under the expectations of society—that they should acquire comprehensive knowledge. Therefore, individuals need to change and learn. In the past, teachers taught only one subject throughout their teaching careers. Today, we have to face and adapt to many changes, say, system changes, holistic teaching, and extra-curriculum activities, which are very different from those during our student days. These serve as sources of pressure'.*

Subject A, a young university graduate in her early 20s, followed the footsteps of many young adults in formal learning. She overcame the foreseeable hurdles she faced during her early adulthood. For example, she studied for a place in the university, for a better job and salary, and for career advancement. She was a skilful and competent learner who passed every examination. In the process of “learning,” the notion of “effective teaching” mattered very much. She used a “teacher-centred” pedagogy in teaching, which she became familiar with during her early student years. Apparently, it is the case that Chinese teachers (and students) stress the importance of foundational knowledge (Pratt 1999). Teachers are authoritative sources of knowledge. Their job is to guide students systemically through a set of step-by-step tasks and to vary the pace of learning according to the students’ understanding. Hence, as a teacher, Subject A played the role of transmitting knowledge to students. In Hong Kong, students are expected to study the course materials well and to remember what they are taught—to obtain satisfactory exam results.

As time went by, Subject A’s learning horizon broadened. She began to realise that as a teacher, her competence in passing examinations does not guarantee her competence as a teacher. She learned that “learning and experience”—informal learning—are integral parts of lifelong learning.

In her lifelong learning experience, Subject A was conscious about formal and institutional learning (education and training). Her learning was externally driven by job and career advancement. Her SELF seemed to be externally supported by her achievement (ability) in passing exams and in completing formal studies. Given her age and her marital status, her commitment and willingness were more than average. She also knew how to pass examinations.

### **Subject B**

Subject B, male, aged 41-50, was a trading manager with BBA and MBA qualifications. He helped his wife run a private tutorial centre for primary and secondary school children.

#### a) What does lifelong learning mean to OUHK learners?

Subject B held the view that lifelong learning commences when one completes formal education and one begins to work. Unlike formal learning, which has boundaries and is traditionally passive and spoon fed, one needs to explore actively interesting things to learn in life. Unfortunately, not everyone likes this way of learning. In schools, learning means being taught and passing tests, and the higher the mark, the better the learning is. However, what is taught may have little relevance to what is experienced in real life (Biggs and Watkins 1993).

*'My learning experience was a bit passive and spoon fed from secondary to university education—until I started working. Learning with boundaries happens to children. I would like to explore and learn without boundaries. Today, without school boundaries and with some spare time, I learn all kinds of things about my interests and about daily life, such as fortune telling. By the way, not everyone can do this'.*

Formal education is distinct from lifelong learning. It is acquiring fundamental knowledge and obtaining qualifications. It is the stepping stone or entry ticket for future learning. In practice, qualifications are generally used by employers and other agencies, such as universities, as “screening” devices rather than solely as signals of particular competencies (Field and Leicester 2000).

Formal learning has a shorter study period than lifelong learning. Lifelong learning is long-term learning through life experiences. It is for improvement and better performance. This reflects the view that to learn is to respond and to deal with everyday life, not just to academic or intellectual study (Brookfield 2005). Hence, learning can be an empowering and positive experience.

*'To me, formal learning is the process of getting fundamental knowledge or theories. Informal or non-formal learning is the process of better understanding'.*

*'To me, a TITLE is not so important! My supervisor used to tell me that your actual and practical value is more important than a title or certificate. Therefore, you can be a business person even without any certificate'.*

*'I tell young people that university education is for them to knock at someone's door. When you are at work, your performance and ways of handling matters are important... I can say that to business people, qualifications do not mean much'.*

Lifelong learning is facing and solving life's problems.

*'To me, doing business involves facing and solving many problems. When there is a problem, you have to solve it and you have to compromise. If you cannot solve it the first time, you can do better the next time around. You'll think again of how to do it better'.*

b) What motivates students to engage in lifelong learning?

Lifelong learning is the process of learning for excitement, self improvement, and knowledge. Indeed, much of everyday learning springs precisely from a felt need to learn (Biggs and Watkins 1993). In addition, the self is central to our conscious motivation to learn (Hallam 2007). It plays a central role in determining what we want to learn, how we go about learning it, and whether we persist in learning. Moreover, motivation is affected by the need for competence, autonomy and control, and relatedness (Woolfolk 2008).

*'Now, my learning is definitely (100% sure) not for getting qualifications or certificates even though I am pursuing this M. Ed. through formal learning. I enjoy the process of learning wherein I meet and know different people and share different ideas. However, I am not a sociable person, and I am not active in making friends. I am motivated by the excitement of learning'.*

*'I studied E809 (TESOL in the M. Ed. programme) in 2000 because I wanted to help my wife teach English in our tutorial centre'.*

Lifelong learning, ideally or ideologically, is learning in a fun way. Initial personal interest in a particular field seems to develop through fun and enjoyable activities, and greater commitment is realised at a later stage (Hallam 2007).

*‘Studying and learning mean two different things. Learning is fun and happy. If you arouse children’s interest to learn, they will become eager to learn, and there will be no need to force them’.*

c) What deters students from engaging in lifelong learning?

Time is the major hindrance that prevents people from furthering their studies.

*‘I completed my Bachelor of Business in the US in 1980. Because of time constraints, it was only in 1998 that I again attended a formal course wherein regular class attendance is expected. As an employee in a trading company, I had to travel to other countries frequently, such as to Korea, Brazil... Half of the time I was in these towns, and the rest of the time I was travelling. When considering further studies, I was concerned with time and flexibility. When I took over my father’s business, I was tempted to study on a part-time basis. I considered becoming a “Certified Public Account” by studying at the Polytechnic University. However, I could not attend the evening lectures, which were conducted three times a week’.*

Employer support was another barrier.

*‘... furthermore, organisations do not fully support their workers. With support, workers can finish their tasks early so they can enrol for further studies’.*

d). What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

Learning becomes difficult when one lacks the experience and the ability of

self-directed learning.

*'It is always useful to learn something new. The learning process is more important than the product'.*

*'I can understand most theories. However, it is sometimes difficult to apply them'.*

*'In the OUHK, the role of learners has been changed. Learners have to be more "self-directed". The courses are "learner-centred". I have to change my learning approach and become pro-active. Can all learners adapt to such learning approach'?*

To overcome learning difficulties in the OUHK, students create study groups to share information.

*'After studying in the OUHK, I met a few classmates and we became good friends. We started working in groups so that we could learn from one another'.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Critical thinking helps in the checking and transfer of knowledge.

*'I will use critical thinking in managing my knowledge. I am concerned with critical thinking in terms of its applicability and its ability to transfer knowledge'.*

f) Why do people choose the distance learning mode?

Subject B was much more concerned about the freedom to choose course contents and time flexibility in completing the course. He was less concerned about the teaching strategy used in distance learning. It can safely be assumed that the freedom to choose from a wide range of courses meets the needs of mature learners.

*'In formal learning, time and flexibility are my two main concerns'.*

g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

The OUHK uses different teaching modalities and provides an alternative learning route. Flexible learning is a teaching and learning approach, which is learner-centred. Moreover, it allows freedom in terms of the time, place, and methods of learning and teaching. It also uses appropriate technologies in a network environment (Moran and Myringer 1999).

*'At that time, I was running my own business with another partner, and I did not need to travel outside Hong Kong. The OUHK suited me more than other universities. It allows a student to complete so and so credits in his/her own pace, and it provides lectures at the same time'.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

The government should keep on providing more learning opportunities. However, the provision of Higher Education (HE) courses must reflect the public demand for more modular, part-time programmes that fit the work schedules of adult students or that are delivered to them online in their offices (Kennedy 2002a).

*'... at that time, opportunities for further studies were limited... I remember that in 1983, that first part-time MBA by CUHK only offered 60 seats. There were not many programmes available at the post-graduate level...'*



Subject B, a middle-aged businessman, obtained a business-related bachelor's degree from the US. He believed that a bachelor's degree was an entry-ticket (i.e., the minimum academic qualification) to work and to further learning. He had been working for almost 20 years. He travelled much before returning for his formal MBA study; he wanted to update his knowledge and to bridge the information gap. According to the information-gap theory (Loewenstein 1994), individuals are motivated to seek insights that reconcile new and previous observations by reordering their previous knowledge in a way that accommodates the new observation. He realised that formal studies, which are part of lifelong learning, meet short-term needs. Lifelong learning is a long-term learning process, which is concerned about problem solving, competence, and performance rather than about the acquisition of qualifications. As a manager, the ability and competence to solve problems was his prime concern throughout his lifelong learning.

Like Subject A, the young female graduate, Subject B was accustomed to passive learning under the influence of Chinese culture and traditional teaching methods. However, he was transformed into becoming an autonomous, positive, and active lifelong learner. In the long process of lifelong learning, he witnessed a change in the learning style that he was accustomed to. In school, Hong Kong children adopt certain

learning styles for purely pragmatic reasons. The exams take a certain form, and thus students develop strategies which they think are appropriate in dealing with these forms of exams (Tang and Biggs 1996). Further, although adult learning may not be separate or distinct from learning during other life stages, there may be some characteristics of learning that are more prevalent in adulthood (Brookfield 2005).

Subject B, with his peculiar working experience, pursued lifelong learning through an informal mode. He supplemented informal learning with formal studies. His lifelong learning intention was more inclined to be internal. However, to a certain extent, it was complemented by his intention to get an entry ticket to further studies and was influenced by government policies. He had a strong and positive self-concept. He believed in his own ability and performance. Moreover, he was committed to informal lifelong learning.

### **Subject C**

Subject C, male, aged 41-50, was a university instructor. He finished Bachelor of Mechanical Engineering and Bachelor of Education.

a) What does lifelong learning mean to OUHK learners?

Accordingly, lifelong learning seeks and applies knowledge. Lifelong learning is

learning through the accumulation and sharing of experiences. In addition, learning involves meaning, understanding, and a way of interpreting the world (Biggs and Watkins 1993).

*'While teaching at the Polytechnic, I studied short courses provided by the university, such as Teaching Methodology, and I applied them. Later on, I migrated to Canada and studied Bachelor of Education in 1989. I wanted to pursue qualifications and professionalism'.*

*'... I quit the private practice of engineering and joined the government... accumulating plenty of experiences. I then shared what I learned by teaching engineering at Polytechnic in Singapore'.*

Lifelong learning is a wide ranging and interesting activity. When asked about what makes him interested in certain things, Subject C enumerated the following:

*i) 'People show interest in something new; for example, great engineers are driven by new things'.*

*ii) 'The practice of engineering is rigid. Engineers just apply engineering principles like soldiers and drivers who simply execute orders and do not think. I am interested in people, literature, and thinking... like a writer'.*

*iii) 'People show interest in areas where they are weak. People desire to satisfy their whole life patterns and to develop and achieve balance. For example, people desire for the development of both their soft and hard sides'.*

*iv) 'I have more than 20 years of experience in investment. I learned finance subjects by reading relevant books, investing, doing investment analysis, using software, and attending seminars or workshops organised by investment companies'.*

b) What motivates students to engage in lifelong learning?

Lifelong learning is to learn continuously when one discovers something interesting to learn or when one begins to become aware of his/her inadequacies and needs. Learning may be deliberate and intentional (Hallam 2007). The concept of a job for life no longer exists. People need to be self-motivated, and they have to make conscious decisions about their future lives (Maslin-Prothero 1997).

*'What mainly drives me to learn is myself'.*

*'I completed my secondary and tertiary education in Canada, and I obtained a bachelor's degree in engineering (Mechanical Engineering and Engineering Science) in 1977. Later, I became a practicing engineer. I lost interest in engineering, knowing that my personality does not fit practical engineering. I was interested in people, literature, and thinking... like a writer. I became interested in many different fields in order to meet my deficiencies. Pursuing knowledge is my goal, especially as there are things that really interest me'.*

*'I am taking M Ed in the OUHK because I want to intensify what I have learned about teaching and learning in B Ed but not in technical sense. I chose E814 (Supporting Lifelong Learning) because I want to know more about adult education. Is adult education the continuation of child development? Further, I plan to establish a learning centre of my own. Hence, I want to learn more about adult education, teaching strategies, and the expectations of adult learners'.*

c) What deters students from engaging in lifelong learning?

Lifelong learners need to possess traits and motivations unique to every learner and are essential in lifelong learning.

*‘Taking the course on lifelong learning entails much time, but I can afford it because I can still sleep a little and I am used to drilling my brain all the time. I anticipate no deterrent in lifelong learning because if one is really interested in doing it, then there should be no problem. For example, one can fish for more than three hours, and one can spend three years or more in researching and in making a new formula’.*

- d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

The traditional way of learning, such as the way a child learns, poses a threat to the development of lifelong learning. In Hong Kong, although much is said about problem-based learning and student autonomy (i.e., learning processes), many academicians continue to employ traditional lecturing methods and to present knowledge as incontrovertible facts (i.e., learning product) (Kennedy 2002b). Didactic teaching—without teacher-student interaction—is undesirable in learning. This is a great challenge for teachers and schools.

Lifelong learning is affected by one’s life philosophy, personal attributes, and beliefs. For instance, it is affected by how one manages himself/herself well and how one is the master of his/her own life. Judgments about one’s competence are made by comparing one’s performance in a domain with the recognised standard for that domain (Geen 1995). Discrepancies between the standard and the level of performance are associated with a lower sense of self-worth. Competence plays a

major role in intrinsic motivation and in interest in tasks. Intrinsic motivation is ‘the natural tendency to seek out and conquer challenges as we pursue personal interests and exercise capabilities—it is motivation to do something that we don’t have to’ (Woolfolk 2008 ). It relies on internal and personal factors, such as needs, interests, and curiosity.

*‘You need to do things and to fulfil your life. If there is something you can do, you must try to do it. I am 50 years old, but I have a young mind’.*

*‘I am a lifelong learner. Since I started working, I had spent 100-200 hours every year studying different courses and getting 20+ certificates. I am highly motivated, and learning is to beat the others’.*

When asked about how to do better than others, Subject C explained,

*‘When I came back to Hong Kong from Canada, I needed to catch up with what I have missed in the past years. I worked very hard to improve my language. This experience of doing better than the others pushed me to learn and do more. I also needed to show that I was a capable person. I readily took challenges in my job. I would compare myself with other colleagues, and I would find ways to improve and catch up’.*

Personal factors, such as interest, determination, hard work, good learning attitude, and methods, can help sustain lifelong learning. While intrinsic motivation may be generated by interest in tasks in the short term, that interest must be internalised and must become part of the individual’s identity for motivation to be sustained over a long period of time (Hallam 2007).

*'Taking the course on lifelong learning entails much time, but I can afford it because I can still sleep a little and I am used to drilling my brain all the time. I anticipate no deterrent in lifelong learning because if one is really interested in doing it, then there should be no problem. When I worked at the Polytechnic, I delved into studying and searching for new knowledge after teaching'.*

*'A GOOD LEARNING ATTITUDE, which I have well cultivated, makes me highly motivated. I can remember that during my early secondary form (Form 2), I brought a chemistry bag containing a test tube with changing colours. This increased my interest in doing experiments. Later, I set up my own laboratory at home, which I used until Form 7. In Form 6, I launched a rocket after searching through reference materials from NASA and from the libraries'.*

*'Before learning a particular thing, one should learn things from the surroundings. This will help you see things completely and comprehensively. Learning is like a pyramid that starts from a wide base towards the apex; otherwise, it will fall down'.*

*'I think that it is important for learners to learn by themselves and to become independent learners. The key drive for learning should come from themselves and from interactions with others'.*

Self-directed learning is important in open universities. Distance learning entails a considerable amount of independent study. However, Hong Kong students are not accustomed to exploratory learning, as they usually follow a very directed learning approach (Venter 2002).

*'According to my understanding, not everybody is suitable to study at open universities. Studying in an OU needs a high degree of self-learning ability. I conducted a study in my school, which indicated that out of 60 teachers, only two to three are suitable for OU learning. I was one of them'.*

- e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

In lifelong learning, critical thinking is important. However, it is not easy to practice critical thinking because of certain cultural constraints.

*'Critical thinking is useful because everything has a hidden meaning. A boss with critical thinking should have the ability to think in advance so that other people/employees can follow him. In certain cultures, followers do not need critical thinking. In these cultures, critical thinking is a sin. It is a sin if you think more smartly than others. Critical thinking (in education) in the Western society seems to be logical and reasonable. Although the culture of obedience to authorities is dominant in the Eastern society, we still need critical thinking'.*

- f) Why do people choose the distance learning mode?

Subject C understood distance learning in the OUHK in terms of the mode of instruction, which is confined to no particular location and which has less regular and compulsory teaching sessions to attend. He chose the OUHK because the prestige of other institutes and of their teachers is not important to him.

- g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

Like Subject B, Subject C appreciated the flexible delivery of programmes in distance learning. The OUHK offers an alternative learning route and allows flexibility in learning for people who care both about their jobs and their families. Thus, he thought that no other traditional institutes could be compared with OUHK.

*'I study in the OUHK for several reasons. I have long working*



*hours. I am usually the one who leaves school late at night. Therefore, I cannot attend regular lectures in the University. I have a family to look after, so studying regularly will give me less time to stay at home. Thus, OU offers me the flexibility to show up at home. I study not because of the reputation of the University or of its professors'.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

The interview lasted longer than expected, and this question was overlooked. In the survey, Subject C indicated that *'to promote learning through lifelong learning, there is a need to de-emphasise the teaching curriculum as it used to stand'.*

After graduating from the university, Subject C first worked as an engineer. He seemed to be interested in engineering (hard science), but later on he became more interested in soft science. By maintaining his professionalism and by fulfilling his personal interests and development (or deficiencies), he became a lifelong learner. He would spend around 100-200 hours in learning after work and had received over 20 certificates.

Subject C's philosophy in life, which is to fulfil life and to do something meaningful, made him a self-motivated person and a person committed to lifelong learning. According to him, knowledge itself, whether it is learned or discovered, is a kind of power in life. As the learning process progresses, individuals accumulate their own

increasingly comprehensive and coherent worldviews, as well as a complex set of beliefs about themselves (Lawrence and Nohria 2002).

Subject C had some personal beliefs on learning. (1) “Interest” itself plays an active role in learning and in working. (2) Hard work is important—*‘Learning is like a pyramid that starts from a wide base towards the apex; otherwise, it will fall down’*.

In addition, good learning attitudes, which were cultivated in his childhood years, sustained his journey towards lifelong learning, particularly in the OUHK. Each individual must be equipped to seize learning opportunities throughout life, to broaden his/her knowledge, skills, and attitudes, and to adapt to a changing, complex, and interdependent environment (Stoll et al. 2000).

Subject C suggested that critical thinking is not readily accepted by society. The lack of critical reflection accounts for difficulties in learning (Brookfield 2005).

Unlike Subject B who used education and training to supplement learning, Subject C used formal studies in conjunction with informal studies. Apparently, judging from his qualifications, he was externally driven. Indeed, he exhibited a high-profile philosophy in life, which continuously drove him to be committed to learn for

intrinsic reasons. He appeared to be a critical learner with a strong internal self.

### **Subject D**

Subject D, male, aged 31-40, was an instructor in a primary school. He finished Bachelor of Mathematics and Master of E. Commerce.

a) What does lifelong learning mean to OUHK learners?

Life long learning has its patterns, pathways, systems, and motives.

*‘Lifelong learning is very natural, and everyone does it. Yet, not everyone can do it systemically’.*

*‘Lifelong learning is learning from our daily lives—with systems, tutors, and motives’.*

*‘Lifelong learning has its pathways—for jobs and for the future. We study in secondary school (F 4... F 7...) and then we work. We then pursue a bachelor’s, a master’s, and a doctorate degree’.*

Lifelong learning is the process of integrating life with experiences.

*‘I gain experience from my job and from everyday life, and my mind is flooded with various knowledge and concepts. I’m confused’.*

*‘With the large amount of course materials, textbooks, and reference materials, I do not know how to start. Integrating information, knowledge, and concepts is a real challenge’.*

b) What motivates students to engage in lifelong learning?

Learning is supported by curiosity, interest, and philosophy in life. In our everyday lives, during our interactions with others and with the environment, we are constantly engaged in learning; this may be incidental and without our conscious awareness

(Hallam 2007). Humans have an innate drive to satisfy their curiosity, to know, to comprehend, to believe, to appreciate, and to develop understandings or representations of their environment and of themselves through a reflective process; this is the drive to learn (Lawrence and Nohria 2002).

*'I am a curious person. I want to know everything that can make me happy. I have broad learning interests, including music, sports, and health care. I start learning with "interest", and then I study for qualifications. If I have the qualification, I can teach other people. Through this process, I'll think more and I'll think critically'.*

*'I would like to know what life is. I find that life is to survive, to reproduce, to share, and to exchange emotions. It's about learning how to improve and how to integrate knowledge with being human'.*

c) What deters students from engaging in lifelong learning?

The realistic approach, which is learned through formal education, may be a deterrent.

*'In my secondary and university education, I needed to choose which subjects to study. I planned nothing ahead. I took a realistic approach to see the best academic results that I can get. I did not plan to study mathematics as my undergraduate course, but it was the subject that I disliked the least'.*

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

According to Subject D, instead of bringing pleasure, studying brings pressure.

*'... studying needs a lot of money...'*

*'I encountered difficulty in my secondary and tertiary education. Teachers were either teaching so quickly or so slowly. The most difficult part is that you need to finish a programme that you're not interested in, such as mathematics'.*

Subject D found ways to support himself.

*'I became realistic, I studied for qualifications. My learning and its results did not bother me, my basic target was to get a "Pass". I found that many people are also just getting the minimum "Pass", not really for learning and knowledge. However, I'll try my best to study under restrictive conditions'.*

*'... no matter how difficult things are, I tell myself that I must be strong enough to get through them... and to keep myself moving on. I'll identify a person, say, my mother, who has emotional bonds with me and who expects something from me'.*

People learn primarily to satisfy their personal needs, which are most likely materialistic rewards and psychological satisfaction.

*'School children usually want to learn because they want to get good results. By so doing, they can get honours; they work for their teachers and parents. Adults learn for their future and for their jobs. Retired persons and housewives learn because they're interested'.*

*'You can do a job even without being interested. However, to learn, one must be interested. If I learn something for the sake of interest, then I won't mind how well I have learned and what I have achieved'.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Subject D asserted that everyone is a critical thinker and that critical thinking is

the ability to critique. When asked if critical thinking is important, he explained,

*'Everybody is a critical thinker, I wonder who's not? The question is how critical one is! In this world, many things are not real or true, say, politicians, news... You should not accept them all as truth'.*

*‘Critical thinking is like “shopping”. Before you make up your mind to buy something, you first go to three other shops to make comparisons. Back to critical thinking, if you have only one kind of idea or thought, it is difficult for you to critique; if you have a second opinion, then you can begin to critique. However, it is still possible that you will stick to your own idea. When a third opinion is available, you’ll try to think more seriously of your idea again’.*

Lifelong learning requires skills, such as critical thinking and reflection, which help young learners search, understand, and integrate knowledge.

*‘The capabilities of young learners, such as logical thinking, abstract thinking, and systematic thinking, are still underdeveloped while they are growing up. They are keen on memorising. However, they should not be satisfied with textbooks. They should take the initiative to search and learn from various sources, to integrate various concepts by themselves, to construct their own frames of reference by organising ideas, and to understand various concepts and relationships. Lifelong learning should emphasise critical thinking and reflection’.*

f) Why do people choose the distance learning mode?

Subject D was confused by the concepts of distance, open, and flexible modes of learning. He expressed that the OUHK’s ways of organising teaching (i.e., flexibility in attending lectures) were beneficial to him.

g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

Subject D was attracted to distance learning because of the flexible time arrangement.

*‘Because of time constraints, I failed to attend regular lectures (2-3 nights/week). The OUHK only has a few tutorial sessions. It*

*would be a great loss if I miss some tutorials’.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

Learning should not rely too much on teachers. Due to curricular constraints, open and distance learning is somewhat compromised. However, what is inescapable is that teachers cannot learn for their students (Hallam 2007). They can support learning in various ways. Ultimately, it is the learner who has to engage in the learning process.

To do this, learners must be motivated.

*‘In my previous study, some teachers were not useful at all. There was a teacher-student mismatch. Studying in the OUHK minimises such problem. I only attend tutorials that can help me learn, and I can choose to attend or not. However, I feel that because of curricular constraints, I’m learning less in the OUHK’.*

Like Subject A, Subject D, although he was not interested in math, completed his university education in mathematics. The course, however, provided him access to study in a university. He recalled familiar, unpleasant, and passive learning experiences while he pursued formal learning. He studied for a “Pass” and for “qualifications”. Therefore, traditional responses to the demand for education, which are essentially quantitative and knowledge based, are no longer appropriate (Stoll et al 2000).

Subject D’s lifelong learning was experience oriented, and he showed a high degree of

commitment. Like the engineer (Subject C), he was aware of his learning needs. Moreover, his lifelong learning was anchored on unique personal and philosophical principles in life, namely, to survive, to reproduce, to learn for improvement, to overcome barriers, to make decisions, and to integrate life and knowledge.

He upheld the importance of critical thinking and reflection in lifelong learning. He presented a good understanding of himself, and he possessed a “continuous learning attitude.” Probably, he already had Brookfield’s (2005) characteristic of learning in later life: the capacity to think dialectically, the capacity to employ logic, the capacity to know how we know and what we know, and the development of critical reflection. He had a strong and positive self-concept. He managed and controlled his lifelong learning quite well; he himself was the master of his learning. Learning seems to be very natural and necessary for everyone, and it needs motives. However, not every person learns in a systemic or organised manner.

His learning was internally driven by his desire “to know everything,” and he engaged in a wide range of learning activities. A well-educated and well-trained labour force is crucial to the social and economic well-being of a nation. Developing education and training systems and improving the labour force qualifications should be featured



importantly in a country's long-term strategic agenda. Lifelong learning should also be promoted for non-economic reasons (Tuijnman 2002a).

### **Subject E**

Subject E, male, aged 41-50, was a building technician. Since 1980, he had continually obtained a number of qualifications through formal studies: Certificate/Diploma in Construction, Post-graduate Diploma in Management, Master of International Business, Master of Chinese Law, LLB (Chinese Law), and Master of Arts in China Area Studies. At the time of the interview, he was studying MSc in Construction (HKU) and Master of Education (OUHK).

#### a) What does lifelong learning mean to OUHK learners?

Subject E regarded lifelong learning as recurrent education or general education. Lifelong learning is a learning activity that one tends to become more actively engaged in as he/she grows up or as he/she gets older. Previous informants had already expressed their difficult and unpleasant experiences regarding formal education during their young adulthood. Through formal education, Subject E tried to catch up with what he missed, just as what other subjects did.

*'After completing my secondary education, I pursued vocational studies (certificate and diploma levels) at the Technical Institute. A few years later, I studied for a professional Diploma in*

*Building and a post-graduate Diploma in Management. In 1997, I obtained my first master's degree. Since then, I have attended different formal studies. By the end of 2006, I would complete my fifth master's degree that specialises in education'.*

*'I find no distinction between general education and lifelong learning'.*

*'When I was young, from 1978 to 1983, I learned diving, canoeing, surfing, and social dancing. Later in 1990-1992, I learned languages, such as Putonghua and French'.*

b) What motivates students to engage in lifelong learning?

Lifelong learning is a means to meet an end, which are economic needs. Professionals constantly need to update their skills because of the rapidly changing demands of the job market (Kennedy 2002a). In this context, the drive for learning is extrinsic. Extrinsic motivation is based on factors not related to the activity itself (Woolfolk 2008). It is related to external environmental factors, such as rewards, social pressure, and punishment.

*'In the early days, when the competition in entering universities was fierce, I had a dream, like many school leavers, to study in a university. At that time, if you could get a degree, you would normally have a bright future. The more you studied, the more you gained. In the end, I chose to pursue vocational studies for economic reasons'.*

*'Career development and the business environment affect my lifelong learning'.*

*'The construction business in Hong Kong is not as prosperous and as stable as before. Therefore, I am studying M. Ed. to get a job in promoting education'.*

Lifelong learning can enhance one's self esteem and self-confidence. If an individual perceives himself/herself as successful in a domain and attributes this success to ability, he/she may come to include in his/her self-concept a positive possible future self (Markus and Ruvolo 1989). In addition, self esteem is related to our need for competence (Koestner and McClelland 1990).

*'... with a stable economic condition and after completing my first master's degree, my confidence was boosted and I pursued further studies'.*

*'Studying for a master's degree enhances my self-esteem'.*

c) What deters students from engaging in lifelong learning?

Learning with little or no interaction and discussion with other people is not desirable.

*'I enjoy small classes wherein there are around 20-30 students and where better student-student interaction and discussion occur. I don't like large group lectures, such as when 50-60 students are packed inside a lecture hall'.*

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

Well-planned learning schedules and targets may be useful. This includes planning study schedules, targeting assignment and examination deadlines, and reviewing and applying what had been taught for better understanding.

A kind of learning welfare benefit can also lessen the financial effects of lifelong learning. This can be realised through loans or subsidies from the government. When

asked about any difficulties he faced in pursuing lifelong learning, Subject E propounded,

*'Course fees present a problem, but I would select courses funded by the University Granting Committee (UGC), making the course cheaper. This is a kind of social welfare'.*

*'I have no pressure in studying. First, as long as you don't perform badly in the course work, you will probably get a "Pass" in the course. I enjoy small classes wherein there are around 20-30 students and where better student-student interaction and discussion occur. Today, a larger number of students are being recruited, and group lectures involving about 50-60 students are becoming common. I don't like it'.*

*'Fully understanding course materials within the term takes time. I just swallow the materials. When the course is completed, I read and use the materials again. To me, this is a normal learning process'.*

*'I never think of giving up my studies after I start studying because before deciding to study whichever course, I assess and make plans. By the way, giving up is wasting time and money. I ask myself whether I am studying to get a "Pass" or to learn. The answer is BOTH'.*

According to Subject E, formal education is a form of consumption rather than an investment. In today's world, knowledge can be packaged and marketed (Jarvis 1997). In this information-led society, knowledge has become a commodity that can be sold like any other. With less leisure activities and peer social gathering, some people may take learning as one kind of leisure activity.

When asked when and what made him view lifelong learning as a form of consumption, he replied,

*'I have not seriously thought about this issue in the past. I take degree programmes for economic reasons, but there is no guarantee that there will be economic benefits after completing a degree programme. Treating learning as consumption rather than as an investment makes me feel more comfortable. Otherwise, I have already made a number of bad investments. By taking it as a consumption activity, I definitely enjoy lifelong learning'.*

*'At this moment, from the perspective of Maslow's hierarchy of needs, I am financially sound. My income can meet my basic economic needs. My family burden is not heavy. I am single, my father is the only person to take care of, and I own a small flat. I can apply for a non-means test loan from the government to finance my studies'.*

*'My peer group members have all grown up, and they have few family members and social contacts. I have few leisure activities now. I occasionally play marjong. I therefore take further studies as a leisure activity. Staying at home is a waste of time. Furthering my studies allows me to use university facilities and avail of the benefits'.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Critical thinking is important, especially in making decisions. When asked whether critical thinking taught in E814 helped him better understand lifelong learning,

Subject E said,

*'E814 made me better understand what is formal/non-formal/informal learning. Every decision is critical thinking. For example, one should be "critical in deciding"*

*whether to pursue further studies by thinking about affordability in terms of time, money, and ability’.*

f) Why do people choose the distance learning mode?

It was only Subject E who raised the difference between open and distance learning.

He asserted that the OUHK is offering open instead of distance learning. He was correct. As early as 1982, the EC proposed the establishment of a consortium of tertiary education institutions in Hong Kong to provide opportunities for open learning through distance education (Jegade 2001).

He pointed out that flexibility and open access are the two reasons why people decide to study in the OUHK. There is considerable evidence indicating that those who are not successful academically value education, but they feel weighed down by a system that denies them the opportunities to succeed (Hallam 2007).

*‘The learning mode in the OUHK is open learning rather than distance learning. OU welcomes candidates from all walks of life. Becoming an OUHK student has some advantages. The mode of study is much more flexible. OU students are free to choose their subjects, their own pace, and the time span to gain necessary credit points. Teaching and discussion sessions by tutors in the OUHK are similar to those in other tertiary institutions’.*

The quality of education in the OUHK is as good as that of other institutes. In addition, no presentation work is needed in the OUHK.

*‘The workload of a student in the OUHK is quite demanding because students need to go through numerous learning*

*materials and complete several assignments, including a research paper at the end of each course. However, it requires no presentations, which other institutes normally require’.*

- g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

The OUHK, an open learning institute, is a self-financed institution not under the jurisdiction of the UGC. Therefore, the OUHK allows learners to register simultaneously with other tertiary institutes of UGC (i.e., double registration).

*‘The choice is obvious and simple. Because I am currently enrolled in a master’s degree in the University of Hong Kong, I cannot concurrently register in another tertiary institution recognised by the UGC’.*

- h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

One can enjoy the benefits of lifelong learning provided that one knows the rules of the game, such as how policies on lifelong learning are set by different stakeholders (e.g., government and tertiary institutions). In the contemporary society, when many individuals have a degree of freedom and autonomy to undertake their own learning or education, the concept of learning has a number of advantages over that of education. Learning focuses on the responsibility of individual learners to undertake their own learning; this reflects the ethos of a consumer society (Jarvis 2002).

*‘I would actively search for information about further educational opportunities in tertiary institutions, especially new programmes. This gives me a better chance to study’.*

*‘When choosing a master’s degree program to study, I consider*

*whether it is the first batch of intake. This would make me a senior member of the course (the big brother). In addition, this increases my chances of admission, avoiding fierce competition'.*

Unlike the previous subjects, Subject E did not earn a university degree prior to his employment. However, he obtained one after completing his vocational training. Subject E thus became a qualifications collector. He completed his fourth degree (MSc in Construction Management) and was nearly finished with his fifth (Master of Education). He did not have many problems in learning because he efficiently arranged and planned his studies. The process and outcomes of studying offered him a sense of self-fulfilment. Unlike Subject A who pursued his studies for qualifications and Subject C for empowerment, Subject E treated lifelong learning as leisure and as a consumption activity (rather than investment). Today, a learning society has become a learning market. Providers produce whatever commodity sells, and while the educational commodity may help some people towards self-fulfilment, it will only be those who have both the time and finances who will be able to purchase their education in the marketplace of learning. Unless they receive more help from the state, others will simply be socially excluded (Jarvis 2002). Subject E kept on learning to be able to review what he previously learned, helping him absorb and understand things better.



Subject E was a professional lifelong learner who knew how to play the game of lifelong learning under the current policies of the government. Initially, he studied for education and training. His hierarchy of learning intentions was raised from the level of gaining qualifications to the level of consumption, which he enjoyed. He understood himself very well. His high level of commitment to lifelong learning was maintained by his meticulously well-planned and scheduled life project as well as his learning skills.

### **Subject F**

Subject F, female, aged 51-60, was an English teacher working in an international school for South Asia Pacific children (ethnic minorities). Unlike other interviewees, she had an extraordinary life and learning journey. She was a housewife for more than 10 years. At the age of 48, she studied in the OUHK. She began teaching after completing Bachelor of Language in Translation.

a) What does lifelong learning mean to OUHK learners?

According to Subject F, only knowledge or learning acquired through formal channels and with qualifications is considered lifelong learning. She further claimed that knowledge or learning from life's hidden curriculum (personal and private domain, such as 10 years of housewife experience) is not recognised. However, it should be

stressed that learning is constructed, that is, what is learned depends on the way one look at things, and learning is self-determined (Biggs and Moore 1993).

Asked about her lifelong learning experiences as a housewife, Subject F replied, *'There was no such thing as lifelong learning at that time, yet people did learn during that period. Housewives learned cooking and floral decoration. They played marjong. They learned from their daily lives without acknowledging it as learning. In my time, only academic learning was regarded as learning because informal learning did not bother people'.*

Knowledge is transformed in life situations.

*'My students like me so much. They describe me as strict but nice like a mother, a friend, and a teacher. I treasure the school environment, which allows me to learn and practice language'.*

*'I attended a one-year teacher exchange program in the US for me to learn native English in an English environment. I lived with local families and learned cultural differences and communication. There, I taught in three different schools. During that period, there was pressure all the time (every second) (cultural differences and expectations from local families), but I was always good at solving problems'.*

b) What motivates students to engage in lifelong learning?

Apart from acquiring formal qualifications, formal learning serves other functions.

For instance, it sharpens one's academic ability, maintains one's bio-psycho (mental) functioning, and boosts one's confidence. In real life, individuals may have a number of life goals, declared or otherwise. Their projects are further broken down into routine action (called scripts). Even if a planned action goes well in itself, the

motivational balance may shift because a separate disappointment elsewhere may cause a shift in the high and/or intermediate goals (Smith and Spurling 2001). Many people, either by force of circumstances or by choice, engage in lifelong learning.

*‘One should pursue lifelong learning regardless of what he/she learns. Without lifelong learning, one’s bio-psycho well-being is affected. Before I got married, my expression was clear and to the point. I was analytic and confident. I helped people solve problems. Today, I am only 70 percent of my previous mental fitness. Experiencing such change or deterioration motivated me to keep learning for myself and for my brain’.*

Being idle and distanced from society and being aware of the risks or deficiencies are good reasons that motivate people to further their studies.

*‘At the beginning, I treasured the life of a housewife. I took care of my daughter. Afterwards, when my daughter grew up and she studied abroad, I found nothing to do. I felt bored because I didn’t like playing marjong (leisure activities related to gambling, usually played among friends and family members). I found myself isolated from society. I obtained a post-secondary qualification many years ago, and I felt outdated. Thus, I wanted to find something to study, and I chose to study a degree programme in translation in the OUHK’.*

*‘An episode of my husband’s sudden collapse worried me and warned me that I have to prepare myself for the future. When I found insufficiencies in teaching, I started an education course (M. Ed.), participated in an exchange programme, and studied part-time for a Diploma in Education in the Baptist University’.*

The drive to learn (i.e., bread and water for survival) is important. Indeed, human behaviour is goal oriented (Kanwal 1987). Maslow arranged five classes of goals in a

hierarchical order from the most basic (i.e., physiological) to the highest level (i.e., self-actualisation). An individual tries to satisfy his/her basic needs and then seeks the satisfaction of higher-order needs

When asked about her future plans, she said,

*'I am studying for a Diploma in Education, a teaching qualification, because I intend to go to the US to stay with my daughter. I will teach for another three years. To plan for the future is to plan my studies. I am more concerned with "bread and water" than with the needs of interests and development. By the way, a teaching qualification is a skill—the bread. Social norms require a teaching qualification'.*

c) What deters students from engaging in lifelong learning?

Studies do bring financial burdens and hardships.

*'I once studied in a private post-secondary institute (Shu-Yan). It was financially unsound for a young couple to study at the same time. Therefore, I quit from my studies for a while. We spent money cautiously to have enough money to buy books'.*

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

For an adult learner, studying again is not an easy task. As one grows older, the ability to read and to use language declines. In particular, learning without formal classes (i.e., distance learning mode) is difficult for adults.

*'I used to pick up things fast, to listen and write at the same time, and to recite and retain a lot of things. I lost these powers as well as the ability to use the language (especially English, which I did not use for a long time). Besides, I didn't get along well with the way of learning in the OUHK. I absorb materials better if someone can explain them to me or discuss them with me. I am*

*slow in reading, which doubles my study time’.*

Subject F believed that optimism helps people overcome difficulties in studying and in real life situations.

*‘I am an orphan. On my fifth birthday, I waited for my father to bring me a birthday gift. All of a sudden, I received the bad news that he was killed in a car accident. Three years later, at the age of eight, my mother passed away. She became ill because of the tragedy... I learned to become independent. I learned to support myself... I wanted to die but I didn’t have the courage to do so. Instead, I struggled to survive...’*

*‘If you look at things with a positive view, you will find many enjoyable things. On the contrary, when you take a negative view, everything will turn blue. Therefore, I learned to take a positive view to make myself happier’.*

In lifelong learning, self-awareness and confidence are important.

*‘One should be very confident, but one should also know his/her own limitations (自信自知). Everyone has his own strengths and weaknesses. Just do whatever you can. This is also a kind of lifelong learning experience’.*

*‘In my studies, I achieved my targets, not necessarily high marks. For example, if my ability could only get a C, I would not mind not getting an A. The pursuit of perfection makes me unhappy. Admittedly, I once chased after perfection. Everyone has limitations and so I learned to compromise’.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Critical thinking leads people to live happier lives.

*‘I was once very unhappy and emotionally upset. Later, I chose to cast and stay away from all unhappy events. I chose to make more friends. I was used to living with social norms. Now, I want to do things differently, and I want to do things with my*

*own choice*'.

f) Why do people choose the distance learning mode?

Again, this question led to confusion. Similar with Subjects B, C, and D, Subject F was confused about the OUHK's flexible modes of delivery and organisation of learning.

g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

The OUHK's flexible mode of learning suits people's lifestyles.

*'I was 48 when I studied at the OUHK in 1997. Of course, age was not a problem. The full-time mode of study didn't suit me because I had to stay at home to wait for my daughter who was also attending school'.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

Good time management, self-discipline, and family support help people pursue lifelong learning. The possibility of acquiring new knowledge, skills, and competencies no longer depends on obtaining a formally prescribed education at any given age. Instead, learning is the tool of the individual, which is available to him/her at any age because so much knowledge and skills are beyond educational institutions

(Tuijnman 2002a).

*'Time management and self-discipline are very important because studying in the OUHK entails self-reliance. Basically, I spend more time and I work harder than others. I also get great support from my husband'.*

Subject F's lifelong learning experience was extraordinary. She was an orphan with poor family relationships. Her learning hardship from primary schooling to tertiary education made her lifelong learning journey difficult, filled with challenges and difficulties. Subsequently, she managed to become a good housewife for many years. This experience made her tough. It gave her strong characteristics and a positive self-image. Once, she lived to comply with social norms and to meet someone else's expectations. Later, she learned to be more critical.

Her lifelong learning for education and training was externally and extrinsically motivated. Soon, after her husband suffered a stroke, she resumed formal learning at OUHK. To her, like Subject A, formal studies are for survival and competition. "Water and bread" was her main drive for lifelong learning. She planned to enter the real world by getting necessary qualifications, which was what Subject B described as the entry ticket. Indeed, she kept on learning about teaching and language. Knowledge is a finitude or an end-product, while learning is always partial, and the progress of discovery is always incomplete (Jarvis 1997).

As a housewife, Subject F failed to recall any learning worth mentioning because like many people at the time, she only regarded formal studies as learning. Learning is the

reorganisation of experience, and the extent to which an adult is prepared for this new learning—wholeheartedly, half-heartedly, cynically, anxiously, or reluctantly—will be a major factor in determining whether that learning will be successful or not (Kennedy 2002c). Without formal studies, she lost her ability to think logically and analytically.

Self-disciplined and optimism helped her solve problems at work and in her studies. She pursued perfection once, but later on she learned to accept her limitations and “to compromise.” She believed that on one hand, people should have confidence in themselves, and on the other hand, people should know their limitations. With self-awareness and understanding, her desire and willingness to continue her studies were still strong.

### **Subject G**

Subject G, female, aged 31-40, was a trading clerk. She was an immigrant from mainland China. She served as part-time tutor, teaching Putonghua to Hong Kong people and English to mainland newcomers to Hong Kong.

a) What does lifelong learning mean to OUHK learners?

Lifelong learning is to enjoy learning. Learning is part of our daily activities. Like a double-edged sword, learning is painful and joyful at the same time. Learning is also



beneficial to mankind. The UNESCO's vision of lifelong learning is about a more equitable distribution of educational opportunities based on a humanistic tradition, leading to positive social and individual benefits (Cribbin 2002).

*'One could not just play 24 hours a day. Time should be allocated to learning. Lifelong learning is beneficial to mankind. While one needs to survive, one also needs to learn. Learning, although painful, can be joyful as well. When you learn something, you can help other people'.*

Lifelong learning is learning from and through life.

*'You can learn from various aspects of life. You can learn things from different occupations. Learning should not be confined in the classroom'.*

Lifelong learning may be pursued through formal or informal ways. Some people choose to learn simply at work without the benefit of any formal qualifications.

*'I first started working as a secretary in Chinese and Taiwanese companies. Later on, I worked in the trading business for more than 10 years. As a beginner, I learned by doing and by asking colleagues and vendors in the practice'.*

*'My manager, who is experienced and good in English, is a good example of learning by experience. I believe that working hard can be a source of learning, and it is even better than schooling'.*

Qualifications and competence, which have different values in the job market, are recognised as the two most acceptable indicators of learning outcomes.

*'In the trading business, working experience is more important than a certificate. When I applied for my present job, I just sent my curriculum vitae, and no verification was needed. However,*

*when I attended interviews in schools, qualifications (especially the true copies) came first. Photocopies were not important’.*

b) What motivates students to engage in lifelong learning?

Qualifications are important in getting an entry ticket and in pursuing professional development.

*‘When I came to Hong Kong, I worked in the trading field. Because I can speak Mandarin and English, I taught Putonghua to Hong Kong people and English to new immigrants from China. I then attended courses in teaching (diploma or certificate) in the Chinese University of Hong Kong and in the Baptist University of Hong Kong’.*

*‘I am studying this master’s degree for two reasons. First, if I quit my trading job, I can go to school and teach. Second, I believe that there are many university graduates in the 20<sup>th</sup> century, making it necessary for me to have a master’s degree. I have to be competitive, and the degree is my entry ticket’.*

Both the process and product of learning are enjoyable.

*‘I love learning and therefore I study. Learning in this knowledge-based society is important; otherwise, one should better go home and do domestic chores. I enjoy the process of learning, of attending lectures. My teacher once told me that I should have as many diplomas as possible so that when people ask me to produce them, I could do so’.*

c) What deters students from engaging in lifelong learning?

Discrimination by employers and by the government in terms of qualifications hinders learning.

*‘I studied many things in mainland China. At work, nobody cares about my qualifications’.*

*'Even though I studied a lot in mainland China, my qualifications are not recognised in Hong Kong. I wonder whether US companies look down on the qualifications of those from Asian countries'.*

Lack of time draws people away from courses they are interested in.

*'I attended violin lessons in mainland China. I had no time to participate in any leisure activities'.*

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

Successful academic learning experiences sustain lifelong learning. Possible selves can be powerful motivators, providing long-term goals and encouraging the setting up of interim goals, which need to be achieved en route (Hallam 2007).

*'My academic grades in primary and secondary school were quite good, leading me to choose to study Chinese Language as my undergraduate course. From childhood until today, I do everything very seriously'.*

A good learning attitude is cultivated in and influenced by the family.

*'My father was a professor, and my mother was a secondary school teacher. In mainland China, living was hard and difficult for my family. Thus, I learned to develop a good learning attitude. I am self-motivated and self-directed. I do not need parents to worry over my studies'.*

There are various difficulties facing lifelong learners. Long working hours and financial burdens are the most common. Perseverance and the joy of learning may help people hurdle these difficulties.

*'Financial burdens are quite heavy when studying in the*

OUHK’.

*‘Due to my long working hours, I cannot attend evening classes. I need to ask my boss to let me leave earlier to attend the 7 PM OUHK tutorial session’.*

*‘Perseverance in learning is important. I worked very hard during the Chinese New Year holiday to prepare for the examination. I enjoy the process of learning and the lectures. I tell myself that I should never give up’.*

- e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

Critical thinking helps people challenge existing beliefs. When asked about the importance of critical thinking, Subject G replied,

*‘There are some negative aspects of learning, especially for females. For example, people will tell you that you are not young anymore so why bother to study? Today, the world not only looks at certificates. Why do females study so much that they think they need to think critically?’*

- f) Why do people choose the distance learning mode?

Once again, the concepts of distance, open, and flexible learning were interchanged by the subject. Subject G was attracted to the OUHK because the institution allows part-time study, and there is flexibility in instructional strategies.

*‘I wanted to study in the Chinese University of Hong Kong. I also took the TOEFL examination and scored 580 marks. Indeed, I chose to study in the OUHK because it offers flexibility in learning in terms of time. I need a job while learning’.*

- g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

Distance learning offers learning opportunities and alternatives to working adults who can afford the course fees.

*'If I have to choose, my job is more important than learning.  
Studying in the OUHK is quite expensive'.*

- h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

People are used to two different ways of learning: formal learning and informal learning.

*'On one hand, people who want to "study" will study [formal ways] no matter how hard it is. Otherwise, they will learn in the University of Society [informal way]'.*

Traditionally, that the pathway of lifelong learning starts with formal learning and then continues with informal learning is taken for granted. Today, we seem to downplay learning without schooling (i.e., informal learning).

*'In the first place, people can learn informally from family members and friends, and then in workplaces and formal institutions. Actually, I do care about the recognition of qualifications from the government. Time is not a problem. Even an 80-year-old man with initial primary schooling can get a Ph.D.!'*

*'I think the government should recognise self-study learning'.*

The childhood of Subject G in China was difficult, making her develop a good learning attitude. She became a motivated learner who does things very seriously, making her highly committed to lifelong learning.

During her years of early formal education, positive reinforcers, such as praise from teachers and achievement in academic results, enabled the growth of her ego and confidence. With her abilities, she developed a positive self-image. She studied simply because she loved learning. Lifelong learning brought her pains and joys. For her, lifelong learning is necessary in this knowledge-based society.

As an immigrant from mainland China, she had some bitter experiences because her previous qualifications were not recognised in Hong Kong. Therefore, she was ready to attend formal learning and obtaining recognised qualifications, which she needed in Hong Kong. Obviously, in this case, her intention to learn was highly related to obtaining qualifications and recognition. However, she found her success in learning informally in the workplace as a trading clerk. She wondered about the necessity of recognising informal learning.

Lifelong learning will not occur in standard educational institutions (Oliver 1999). It is likely to be incorporated in all types of learning, work-based learning, distance learning, training, personal study, informal leaning groups, and institutionalised study.

## Subject H

Subject H, female, aged 31-40, was a trainer in a German multinational IT company.

Her main duty was to support company development. She finished Bachelor of Information Technology.

### a) What does lifelong learning mean to OUHK learners?

Lifelong learning comes naturally from learning, with an obligation to learn with options and with more learning autonomy.

Asked about her view on lifelong learning, Subject H replied,

*'Lifelong learning is part of my life; it is very natural to me. My experience is lifelong learning, and lifelong learning is good. Let's say that I do not have any particular motive behind learning, and no critical period or transformation process'.*

*'At first, I was obliged to study. Now, I have options. I will save enough and see what I want to study. I will not blindly follow what suits other people. Everyone has unique needs and interests'.*

Lifelong learning is enriching, and it empowers life. When asked about the goodness of lifelong learning, Subject H related,

*'Lifelong learning fights boredom. The way of life in which nothing is learned and there is no improvement is gloomy. I don't want to get bored; some challenges look good. I am used to getting challenges. If I get tired, then I'll rest. My priest describes me as a locomotive. Lifelong learning enriches my life'.*

Learning is for performance rather than for qualifications.

*'I never tried to find a job, which demands qualifications, good academic achievement, and competitiveness. I want to search for jobs in small companies. I did not choose to work in the government and in big banks, which consider qualifications and even require examinations for the job. My current employer considers personality and performance more seriously. My promotion did not need a master's degree... I feel very lucky'.*

b) What motivates students to engage in lifelong learning?

Studying helps boost self-confidence. Lack of confidence is the driving force behind learning.

*'I lack confidence, thus I need to do something to boost it. My family is poor, and we come from a lower social class (poor social status). I do not have a sense of superiority, and I also lack confidence. I attempted to obtain a QUALIFICATION to back up my social status (social mobility). Later on, I didn't think that way anymore. I prefer to study for interest's sake. Lack of confidence DROVE me to learn EVERYTHING'.*

c) What deters students from engaging in lifelong learning?

Studying in Hong Kong is expensive because all studies are pegged with qualifications. People also tend to have more confidence when they study expensive courses.

*'Today, studying is very expensive. In the OUHK, a master's degree course (a total of 60 credits) costs around HK\$60,000 (HK\$20,000 plus a year means more than HK\$2,000 a month if paid in 12 instalments). To many, this is not affordable. I wonder why course fees need to be so expensive. However, if course fees are cheap, people will not be confident about the courses'.*



- d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What support do they receive?

To continue formal studies, support from tutors and peers is required. Self-directed and open learning is not suited to students who lack initiative in learning, background knowledge of the subject matter, and competence in the English language. Distance learning entails a considerable amount of independent study, and this may present difficulties for students whose previous experience has been of a transmission type of teaching (Venter 2002).

Individual personality is one of the problems. Learning has to appear to become enjoyable for everyone (Jarvis 2002). Unpleasant school experiences are barriers in the pursuit of lifelong learning. This is what every adult educator seeks to overcome.

*'The OUHK requires much learning initiative from students. This requirement does not perfectly match with my character and laziness. I need somebody to oversee and push me.'*

*'I am no good at learning. It is not easy for me to absorb what I learn. I also easily forget. I am weak in concentration and endurance, and I'm easily disturbed. Without a quiet personality, sitting down quietly to study is difficult for me.'*

Lack of background knowledge is a setback. When asked about her current study,

Subject H said,

*'I feel that the way of learning "arts" subjects is different from that of "science" subjects. There are a lot of materials and*

*information to read. Thinking, as required by my tutor, is very difficult for me. I have no background knowledge. Studying in the OUKH was okay during the first year... but it is becoming more difficult... now it is very painful'.*

Lack of support from tutors and peers makes life harder. In the OUHK, tutors often employ approaches that do not fully match students' preferences. The initial expectation of students is that the primary function of tutorials should be the provision of academic rather than psychological and social support. Tutors guide students through the key points and help them work on their assignments (Fung and Carr 1998).

*'I have a very bad relationship with my tutor. The situation is nearly out of control. When I ask my tutor questions, the tutor will ask me to think about the question again. It is frustrating. Hong Kong students are already discouraged. They expect to get a certain kind of service. Instead, they get nothing in return for what they have paid for'.*

*'I feel lonely in the study. I need to force myself to study. I was once optimistic in going through this journey. Now, I am turning out to be unsuccessful'.*

The use of the English language is also a barrier.

*'Language is a problem to me. I studied in a secondary school where Chinese is the medium of instruction. A high level of learning with English as the medium is difficult'.*

Studying with companions provides some form of support.

*'When I studied for my undergraduate course, I had companions—friends and classmates from my diploma course'.*

Lowering one's expectations is one of the solutions.

*'Despite the problems and difficulties ahead, I still keep on studying. I will just lower my expectations about the results of my study. I believe that my grades are at par with my efforts'.*

When asked about studying not for marks or for academic achievement, Subject H said,

*'I think that marks are on the low priority at the tertiary level. I am not a hardworking student; hence, I do not expect high academic achievements. When I studied in the City University, I barely completed the course. I failed a number of subjects. I think that learning that ends with assessment (examination) does not suit me'.*

Endurance and perseverance are common factors that sustain learning. The attitude of “never giving up” is useful for every learner. In the Confucian heritage, students attribute success and failure to efforts rather than to abilities as Westerners do (Biggs 2003).

*'I don't like people who quit just after finishing one module. I have no master's degree and I want to get one (never give up)!'*

*'I do not care about the study. What I need is to finish the course. When I started, MONEY (cost of the course), rather than academic results, was my concern. The fees are not just hundreds but thousands. It is something that cannot be afforded by many Hong Kong people. I do not want to drop midway, but dragging along will affect my will to fight. If I could finish in the near future, then I would not choose this kind of course'.*

A supportive social network is also important.

*'When my motivation is not high, I try to get help from other people. Luckily, I have many friends. I am not the kind who is motivated to study, but I am active in asking others for help'.*

*'When I feel down, I do nothing and just let it be. This is the good side of my personality. I accept things that cannot be changed. I never regret what I have chosen. You should not feel regret... and then everything will be all right'.*

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

This question was not explored due to time constraints.

f) Why do people choose the distance learning mode?

Subject H, just like Subjects A and E, considered open learning to be synonymous with distance learning. She liked open learning in the OUHK. Open learning, that is, education for all, offers less stringent entry requirements and provides learning opportunities to a number of learners. Open universities tend to place few restrictions on students choosing from their pool of courses (Kember 2007).

When asked why she chose to study at OUHK, Subject H replied,

*'At the beginning, my friend, who is not a teaching professional, and I were interested in child development, and we wanted to find a school where we could study it. Without teaching qualifications, we had difficulty in finding a suitable institute offering such course. The OUHK was the only lenient course provider, espousing "education for all".'*

The OUHK is a tertiary institute offering recognised and qualified formal courses.

*'It was because the OUHK offers formal qualifications--a master's degree that my friend wanted to get. Hence, we chose the OUHK...'*

g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

Overseas (offshore) distance learning programmes offer alternative choices in the

pursuit of higher education in Hong Kong. The intensive modular system can help learners complete a course in a shorter period.

When asked about any experience in distance learning, Subject H said,

*'I shortly attended a master's programme in management offered by an Australian university. The course, consisting of 10 modules, a group project (a bit easier to handle), and an examination (the pressure was great), was to be completed in one-and-a-half years. It was conducted with intensive lectures by lecturers from Australia. This mode of learning forced me to study in a short period of time'.*

*'Comparing the Australian university with the OUHK, both have face-to-face contacts with students. The OUHK offers 60-credit subjects for a year, and one needs to submit four to five assignments. The course structure appears to be a bit lax and is too long. No one keeps an eye on you. It would be nice if distance learning did not have examinations, and students were really interested in the subject'.*

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

Financial support for lifelong learning is important. Borrowing money to support learning is not favourable.

*'My friend and I don't like to borrow money to study. Loaned money must be paid with interest. However, I once borrowed money for the purpose of studying. In doing so, I felt a great deal of pressure because I needed to study well and to pay back the money'!*

Some do not enjoy academic learning and prefer learning in their workplaces instead.

*'When I worked in the IT sector, I studied my first part-time undergraduate course in IT in the City University. Studying IT was not very difficult because it was job-related'.*

When asked whether her organisation provides many things to learn, Subject H said, *'Yes. It is because my boss has many ideas. Besides, I am working in the IT field, which is rapidly changing. I learned German from a German company. The environment is supportive, and there are opportunities to practice inside the company. For example, I write German e-mails because the website of my company is written in German'*.

Looking back at her lifelong learning experience, Subject H found that lifelong learning is natural and useful. Not an ambitious person, she was willing to pursue lifelong learning through non-formal and informal modes. Many of the new jobs in the knowledge-based economy require formal education. However, perhaps, more than qualification per se, jobs will require the ability to acquire and apply new ideas continuously and to use knowledge creatively (Tuijman 2002a). The nature of learning in the workplace is also changing. Informal, self-directed, and team learning is gaining ground over formal classroom instruction. Subject H was not inclined to education and training.

Subject H was obviously not committed to pursuing formal studies because of the shortcomings of academic learning. Academic learning, to a certain extent, fails to hone abilities. She found that she did not benefit much from open learning in the OUHK. The lack of pre-requisite knowledge and self-control, and as well as the expensive course fees, made her feel angry and frustrated. With more students now

paying their own fees or taking out loans in order to study, there is understandably more awareness of consumer rights (Kennedy 2002a). Students feel entitled to offer critical comments about courses that they have paid for. Studying in the OUHK is comparatively more difficult than studying in overseas distance learning institutions in terms of course contents and workloads. Individual distance learners have to develop their own styles of learning, taking into account the context, environment, and content of learning (Venter 2002).

## Conclusion

The results of these case studies are apparently similar with the findings from the course evaluations, course work activities, and group interviews. The subjects were extrinsically motivated and goal-oriented, and their participation in lifelong learning was market driven. They studied for economic and social gains and needs. Further, they took lifelong learning as a strategy to live. Their beliefs about lifelong learning lacked the concepts of life-wide learning, personal development, and learner-centeredness. According to them, the distance and open learning mode, to a certain extent, facilitated lifelong learning development. Moreover, government policy and support in terms of finances and family care were deemed important by the subjects.

The case studies raised key issues that are worth mentioning. First, traditional schooling experiences highly influenced the subjects' understanding of lifelong learning. Although they had different stories to tell, they generally started with their common learning pathways—how they studied well in secondary schools to go to the university. The formal learning (i.e., secondary to tertiary education) that they experienced was unpleasant, passive, compulsory, and spoon fed. Hence, the teacher-centred and examination-dominated school system is to blame.

Education was, at one time, wrongly equated with the mere transfer of information, placing an over emphasis on memory (Suri 1994). Instead of seeing education as instrumental to the achievement of an extrinsic goal, education should also be perceived as an intrinsically valuable activity, which is something that is good in and for itself (Field and Leischester 2000).

Second, in the study, the informants shed light on the importance of motivators, such as interest, attitude in learning, philosophy in life, and peers.

Third, against all odds, the respondents chose to participate in lifelong learning. However, they hardly found time to read. They experienced financial constraints in



paying the expensive course fees. In 1995, the number of self-funded lifelong education programmes for human capital development in Hong Kong was 29 percent of that of government-funded programmes (Ng and Young 2000).

Fourth, perseverance and the attitude of “never giving up” sustained the lifelong learning interests of the subjects. Hong Kong students often attribute their academic success to efforts rather than to abilities; hence, they tend to find ways to improve their performance (Ho, Biggs and Hau 1999).

Fifth, the respondents found the OUHK, Hong Kong’s sixth degree-awarding institution, useful as an alternative route for them to continue their formal higher education. The OUHK plays a unique role in tertiary education because of its open and distance learning approach. However, the respondents were not conscious and critical about the difference between “distance” and “open” learning.

*‘... the predominant way of meeting the demand for open entry programmes has been through distance education, most commonly by following the model established by the UKOU. In most cases, I suspect little thought was given to alternatives. The success of the UKOU has meant that open learning and distance education have become synonymous’ (Kember 2007 p. 70).*

The respondents also underscored the issue of “open access” and “flexibility” in having chosen to study in the OUHK. They enjoyed the flexible course structures. In

the OUHK, there are less frequent and regular lectures to attend, and there is greater freedom and autonomy in learning. Further, the programmes of OUHK (i.e., teaching and learning) are organised around the distance learning mode. The OUHK offers open access, where there is limited or no entry criteria. It utilises a flexible modular system and grants learner autonomy in choosing subjects to study. Therefore, respondents took for granted that the three elements (i.e., open, distance, and flexible learning) were all in one in the OUHK. Student subjects who had family and work burdens and commitments were happy to realise that the OUHK could free them from time and space constraints. The OUHK also allowed them to choose courses that suited their interests and backgrounds. What the respondents talked about were Kember's (2007) features of open learning. Kember asserted that open learning involves a number of facets of openness, of which the following are the most crucial (i.e., the four elements): open entry, the possibility to study anywhere, freedom to study at a time chosen by the student given a specified semester, and a higher degree of openness over the choice of courses that make up a degree programme. On flexible and distance learning, Kember stressed the need to increase face-to-face interaction as well as the extensive use of information and communication technologies.

## Chapter Five: Part (II) - Author's Self-Reflection (Subject I)

### Introduction

In the past 10 years, I have had some personal and unique experiences in education and training. As a nurse educator, I taught nursing students in a hospital-based nursing school. Since 1998, I have also been a part-time tutor at the OUHK. As a learner, I studied my bachelor's and master's degrees and Ph.D. through distance learning. With reference to the preceding sections, which reflected the lifelong learning experiences of OUHK learners and course coordinators, this section presents a reflection on my journey as a lifelong distance learner (outsider) and tutor (insider).

a) What does lifelong learning mean to OUHK learners?

b) What motivates students to engage in lifelong learning?

If I were not a tutor teaching E814 (i.e., Supporting Lifelong Learning), I would have no idea about lifelong learning. Indeed, in everyday usage, learning is synonymous with education, and all learning is treated as taught learning (Smith and Spurling 1999). In my E814 classes, I explain the different concepts of teaching, education, and learning in the context of lifelong learning.

Like most of the respondents who shared their personal lifelong learning experiences, I will start with a reflection on my journey towards lifelong learning. At the onset, I

took lifelong learning as (a) compulsory primary and secondary education; (b) further education after leaving formal schooling, which aims at obtaining higher qualifications and at promoting job security; and (c) continuous education to keep oneself updated and to get in touch with the emerging demands of one's career and of the society. I am currently thinking about learning after retirement and studying for personal enrichment, pleasure, and interest.

Through the pursuit of qualifications (formal education), lifelong learning to me is for the betterment of life. Education and training systems have become obvious policy priorities because of their wide reach and potentially direct influence on human resource development (Hodgson 2000). In a rapidly changing society, the argument for a move towards education and training systems that encourage learning beyond compulsory education and throughout people's lifetimes is compelling. After the interviews, I realised that I was lucky to have invested in learning. Today, my investments are giving me returns in financial rewards and satisfaction. Returns to individuals undertaking award-bearing courses through lifelong learning are quite significant (Cribbin 2002). To me, other than materialistic rewards, lifelong learning can enhance one's cognitive abilities and psychological well-being. With the rise of credentialism, I still pay for my studies (which is against the will of my wife who

suggests that money should be spared not for our personal but for our children's future education) because structured learning, which involves interaction with teachers and students, helps me learn new things, widens my horizons, renews my thinking and writing skills, and increases my self-confidence.

Similar to the respondents in this study, I maintain that lifelong learning has structural learning pathways (i.e., boundaries), from compulsory formal schooling (i.e., primary, secondary, and degree-level higher education) to adult continuous education (i.e., academic, vocational, or professional education).

#### 1) Formal education

“Initial learning” covers people who are under compulsory education (i.e., up to age 16) or who attend further education or higher degree-level education without break Smith and Spurling (2001). My father was the breadwinner of a family of four. He was a manual worker who was once unemployed. My formal education was from kindergarten to Form 5. At that time, with my undesirable academic records, I could not proceed to Form 6. I felt inferior because most of my cousins were able to immigrate to foreign countries (e.g., US, UK, and Canada) to further their studies. At that time, I thought about my chances of getting a better education and of finding a

better job.

With the support of my caring parents and my hope to obtain better results, I re-attempted to take the School Certificate Exam. I spent several months studying at home without going to work while attending evening school to prepare for the examination. Formal education and access to universities helped me find a better job.

The chief characteristic of Hong Kong's approach to education may be defined as "utilitarian": both students and parents are keen that it should lead to a career (Chen 2002). They fail to see that formal education no longer assures a specific career in this ever changing world.

## 2) Career training and development

At the end, for financial and career reasons, I did not re-attempt to take the School Certificate Exam but chose to train as a nurse. In June 1981, although I was not that interested in becoming a male nurse, I started my three-year nursing student training in a government hospital. I became a registered nurse (RN) in 1984. With my qualification, I attended a number of nursing specialty training courses (e.g., Intensive Care Nursing, Orthopaedic Nursing, and Coronary Care). I received professional and academic education (e.g., Nursing Education and Bachelor of Nursing), which further

developed and advanced my career. Post-initial learning, whether it is education or not, is beyond the point of initial learning (Smith and Spurling 1999).

I deliberately chose formal and recognised training courses, which were supported and sponsored by my employer (i.e., the hospital) in terms of time and money. In Hong Kong, CE tends to be an individual responsibility (Cribbin 2002). In considering training or learning, I usually took a materialistic and calculated approach by weighing the course's benefits against the long-term needs of my career. Indeed, *'no investment is more fulfilling or ultimately more profitable than education'* (Chen 2002 p. 172).

Looking back, qualifications brought me many gains. From a clinical nurse, I was promoted to Nursing Officer (Education) after having completed my Diploma in Nursing Education. My qualifications (i.e., Diploma in Nursing Education and MSc Training) enabled me to secure various part-time teaching posts in the past 10 years. I conducted non-credit and credit-bearing courses for Red Cross, the OUHK (i.e., School of Education and Languages and School of Science and Technology), and LiPACE.

c) What deters students from engaging in lifelong learning?

When I took a distance learning course years ago, I learned that the Australian government was exporting its education enterprise. Today, course providers take a market approach and treat learning and studying like business and commodities. In fact, the Hong Kong government is thinking of internationalising and upgrading Hong Kong's tertiary education to world-class levels to attract more international students. Therefore, whether it is for studies or not, finances will top the considerations of many people. Like most of the respondents in this study, I am concerned about the costs and benefits—and even the affordability—of pursuing lifelong learning. Most learners fund their own studies rather than receive support from their employers (Cribbin 2002). Evidently, developments in part-time, flexible, and self-financed lifelong learning, which meet the needs of the workforce, will be significant.

Invariably, studying demands not only money but also time. Due to my commitments to my family and to my full-time and part-time jobs, I found it difficult to spare time for studying.

d) What are the current problems and the anticipated future problems faced by students in lifelong learning? How do they manage to solve these problems? What



support do they receive?

OUHK learners are ambitious and over-confident. Readiness and preparedness to learn are thus important issues. I agree with Subject E's view that in planning to study, one should fully assess his/her ability and situation. As a tutor, I witnessed some OUHK learners who were too ambitious to study more than one subject at the same time. In the end, they would rush their assignments and frequently ask for extensions for each assignment submission. OUHK learners sometimes misinterpret the meaning of open and distance learning. For example, they enrol in subjects even if they know that they lack the background and pre-requisite knowledge; they think that they are self-directed learners but they are actually not; and they think that they could learn in English without problems, but it is not the case. Therefore, academic and psychological preparations are important.

Admittedly, the role of teachers in distance learning is limited. Student interactions, which are lacking in distance programmes, facilitate knowledge and experience sharing as well as knowledge development. Hence, the quality of distance learning is, to some extent, compromised.

e) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

I agree with Subject D that everyone is a critical thinker. The actual question lies in how critical one is. Both coordinators argued that it is difficult to put critical thinking into practice. I feel that it is easy to learn and to use critical thinking when writing essays or assignments. In this era of overflowing information, stressing that one should be more critical in learning and living is important. However, it is easier said than done. One may be critical, but one has to live up to the culture, norms, and expectations of society. The use of reflection as a process of producing new meanings indicates that learning does not simply emerge from experience; it needs to be actively challenged and worked on (Harrison et al 2004). For example, the Hong Kong government influences the people's ways of lifelong learning by claiming that Hong Kong is a knowledge and economy-based society. As a result, many teachers and nurses are following suit and are pursuing higher studies. However, developing a critical thinking society is not an easy task.

People more readily accept reflection as a way of learning—a kind of informal learning. However, while people are concerned with qualifications and formal learning, the promotion of an informal and reflective learning society will take a

longer time. Under the uncertain conditions of reflexive modernisation, it is worth noting that as flexibility becomes a requirement in the workforce, producing self-reflective workers and citizens have become the goal of educational interventions (Edward 1998).

f) Why do people choose the distance learning mode?

Hong Kong has one of the largest concentrations of offshore distance education programmes in the world (Jegede 2001). As of June 2000, there were 550 non-local programmes in Hong Kong offered in more than 60,000 places. Indeed, many of the institutions offering distance education offshore do not have established distance education or offshore education cultures to draw from or build upon (Evans 2000), such as supportive services and facilities and scholarly interactions (with the staff and other students) at a distance.

Therefore, I did not choose distance learning simply because of the mode of instruction and the organisation of learning. As a tutor and lifelong learner, I prefer a structured and organised (i.e., formal and non-formal learning) form of learning. Although I can read and study alone, I do not have the ability to discriminate and organise an array of knowledge by myself—probably, it is the issue of IQ and EQ. As

an experienced distance learner, I also find that self-learning is not an enjoyable experience.

I would consider offshore programmes if they require less competitive entry requirements and if they provide trimmed or packed curricula that could be finished in a packed and shorter timeframe. It is fair enough to say that if offshore distance education can provide updated course materials, clear instructions, objectives, and guidelines with limited face-to-face contacts for teaching and sharing, then it can satisfy my needs. It is the flexibility in learning that I like. Flexible learning consists of a mix of face-to-face and distance learning (Kember 2007). In offshore distance educational programmes, I treasure group learning activities or interactions. Although all offshore distance learning programmes have face-to-face and whole groups elements compared with Australian programmes, distance learning programmes in UK universities involve a few visits by lecturers and demand more individual efforts and inputs, which are quite difficult to me.

g) To what extent is OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

I was trained and was awarded a Higher Diploma by a hospital-based nursing school.

It was a pity that I did not have any recognised academic qualifications except for my secondary school certificate obtained through a public examination. Thus, as a fresh and young staff nurse who was then working in shifts, I attempted to attend part-time studies at the Extramural Department of the HKU (i.e., Certificate in Nursing Behavioural Science' and Certificate in Use of English). Studying was difficult. I had to rearrange my duties to attend regular lectures.

While qualifications obtained through the open and distance learning mode are recognised, surely some people like myself take the advantages offered by distance and open learning. For example, distance and open learning provides access to opportunities--a second chance--if one can afford it in terms of time and finances.

Without any traditional strict entry requirements and fierce admission competition, distance learning helped me gain access to further studies. Although the lecture schedules and course contents were tight, I was attracted to distance learning because the learning period was shorter compared with that in traditional learning. In other words, the earlier I obtained so and so qualifications, the more that I gained competitive edge. The distance learning programmes that I took also offered fast learning, which made me catch up with the pace of the fast changing world.

In the early 1990s, I enrolled in a part-time, day release, credit diploma course in nursing in the Hong Kong Polytechnic (HKP). I told myself that after finishing the diploma, I could enrol in Bachelor of Nursing (Hon) on a part-time basis. Obtaining such nursing degree would have probably taken me about six years. A few months later, I quit from the diploma course when I learned that I could complete Bachelor of Nursing (without Hon) in three years through distance learning. Subsequently, I attended a distance learning nursing degree programme in Hong Kong jointly organised by La Trobe University (Australia) and the Extramural Studies of the Chinese University of Hong Kong. Many offshore distance learning institutions often seek partnerships with local institutions and organisations to run the programmes on their behalf (Jegade 2001). I quit the programme due to materialistic and realistic reasons. I did not want to spend longer time attaining my first degree through the conventional way. I liked the structure of the distance learning programme, which provided study guides (course materials), face-to-face tutorials, and summative assessments (i.e., essay writing) instead of formative assessment (i.e., three-hour written examination). At that time, the programme suited me most because I was working in the ICU where night shifts schedules were quite frequent and workloads were heavy.

Since then, I seemed to have adapted well to the distance learning mode, and I have been studying various overseas programmes to equip myself with the necessary knowledge and qualifications for job enrichment and future promotion. For example, I took MSc in Training (University of Leicester), Graduate Diploma in Administration, and Master of Management (both from the Australian Catholic University), and I am currently working towards finishing Doctor of Education (University of East Anglia).

I prefer to learn by distance mode because it allows me to study two academic courses at the same time. When I was studying the last few modules of my bachelor's degree, I enrolled and started my diploma course in Nursing Education. While I was about to finish my second year in Nursing Education, I enrolled part-time via distance learning at the Australian Catholic University (Graduate Diploma in Administration).

Furthermore, distance learning, without the frequent class schedules, allows me to better manage my time among my part-time studies, full-time and part-time jobs, and family commitments.

As a secondary school leaver, I am grateful to the excellent idea of distance learning, which offered me a "second chance" to further my studies and to make my academic dreams come true. Distance learning, along with open access and lenient entry requirements, offers learning opportunities to many. Distance learning courses are

usually self-financed and expensive. To encourage lifelong learning, financial support from the government is important.

h) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

While learning is generally associated with formal studies and qualifications, learning in informal ways, such as workplace learning and situational learning, is neglected.

We need to shed light on knowledge acquisition through life-wide experiences and practices. We must be released from the chains of the human capital theory, which measures inputs in terms of years of schooling (Field and Leicester 2000).

Conventionally, policy makers have taken a highly conservative view about schooling's contribution to lifelong learning. By extending the number of years spent in full-time initial education and by improving the performance of the initial educational system, a number of Western governments argue that they are in fact promoting lifelong learning. Further, in the modern economy, it cannot be assumed that graduates or holders of any other qualifications will maintain and enhance their knowledge after receiving their qualifications (Smith and Spurling 1999).

As an intensive care nurse and nurse educator, I realise that the competencies of a nurse are developed by integrating knowledge and experience. Lifelong education is



very different from working for lifelong learning (Smith and Spurling 1999). We need a mechanism from the government to advocate and promote a systematic way of learning at the workplace. The new Hong Kong Qualification Framework (e.g., National Vocation Qualification), which is job-oriented, is a good start. However, it is not comprehensive and lifewide enough. Nevertheless, the learning process is ignored. National vocations are assessment driven rather than process driven (Challis 1996). Moreover, the amount of control left to the individual learner lies neither in the creation of knowledge nor in the setting of learning objectives but only in the best way to present evidence of learning based on the required standards.

The respondents frequently said that studying, which in itself is interesting, is also fun. Outside my working life, I have a number of learning interests. In my case, however, at this stage of my career development, I choose and spend my time studying career and job-related subjects. I leave my “interest-related” subjects to be learned after my retirement. Our learning attitude is focused so much on the differentiation (i.e., boundary) of learning by timeframes and contents. What should the government do to break the boundaries of learning? What are the plans of the government to face the growing demands of learning from a large number of retirees?

Like most of the respondents of this study, we don't bother to know whether lifelong learning means adult education, continuous education, or lifelong education. We learn and receive education to improve our lives and to gain competitive edge. Probably, we, including myself, are accustomed to the sayings that "knowledge is power" and "knowledge can change your destiny." Formal learning means recognised learning, and learning becomes a market.

## Conclusion

In this section, I gave an account of learning from my secondary schooling to my Ph.D. study. I viewed learning as a strategy for living and working. Thus, I shared most of my academic and professional learning experiences. My non-formal and informal learning experiences were difficult and understated to recall and retrieve; hence, they were not presented. As an investigator and lifelong learning tutor, I am critically concerned about my current lifelong learning practice. I do envision Hong Kong to become a holistic, well balanced, pluralistic, and seamless learning community.

## Chapter Six: Conclusions of the Subsidiary Questions and the Research Problem

### Introduction

To cope with the emerging changes and forthcoming challenges, many international bodies, such as the World Bank, UNESCO, and OECD, as well as states like the Hong Kong government are advocating lifelong learning, a programme geared towards preparing and equipping people with comprehensive knowledge and skills. The political and educational discourse surrounding a learning society and lifelong learning has been shot through not only by extremely conceptual vagueness but also by “factual” assumptions and assertions unsupported by any hard evidence (Coffield 2000b).

This study aimed at collecting empirical data from a group of lifelong learners studying and working at the OUHK (i.e., students, course coordinators, and the author as a part-time tutor). Their views and perceptions of lifelong learning and the ways to foster and sustain their lifelong learning were examined by looking at their lifelong learning experiences.

This chapter discusses the conclusions for the main research question by considering each subsidiary question, followed by the implications and recommendations arising

from the study, and lastly the limitations of the study and its implications for future research.

## 6.1 Conclusions Related to the Subsidiary Questions

The title of the thesis is “Learning through life: A study of learners at OUHK”. The aims of the study are to a) understand the nature, extent, and patterns of the experiences and opportunities of OUHK learners as adult/lifelong learners; b) explore their strategies in engaging and pursuing lifelong learning at the OUHK; c) understand the role of distance/open learning in lifelong learning; and d) explore a framework of learning in relation to the current lifelong learning policy.

### 6.1.1 The central question of the study

How is lifelong learning fostered and sustained among learners at the OUHK?

### 6.1.2 Subsidiary questions of the study

- a) What does lifelong learning mean to OUHK learners?
- i) What motivates students to engage in lifelong learning?
- j) What deters students from engaging in lifelong learning?
- k) What are the current and the anticipated problems faced by students in lifelong

learning? How do they manage to solve these problems? What support do they receive?

l) Is it essential to develop the ability of reflection and critical thinking in lifelong learning?

m) Why did people choose the distance learning mode?

n) To what extent is the OUHK's approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

o) In what ways should the Hong Kong government influence the development of a lifelong learning policy?

### 6.1.3 Demographic data

According to Perraton (2000) Asian open universities generally recruit students below the age of 30 and recruit more men than woman. Jegede (2001) noted that in the semester of December 2000, the average age of an OUHK student was 32, with the majority (43.4%) belonging in the 31-40 age group and a male-female ratio of about 1:1. Students who occupied professional managerial positions in their workplace accounted for about 40 percent of the OUHK student population. This study echoed previous studies and found that regardless of gender, working adults with professional and academic qualifications are more ready to participate in lifelong learning through

the OUHK.

In this study, the respondents were young and middle-aged adults (21-50). Females (non-degree holders) were the dominant population among the nursing undergraduates, while the other half (male and female degree holders) finished post-graduate degrees. Woodley (2001) divided the OU student population into three: those with some higher qualification, those with HE entry qualifications, and those with lower or no qualification. This study indicates that learners with high qualifications were willing to enrich their lifelong learning experience while those without qualifications were eager to take hold of the opportunity to receive tertiary education. Moreover, the respondents who were active in participating in lifelong learning activities aspired to obtain academic and professional qualifications through formal studies.

#### 6.1.4 What does lifelong learning mean to OUHK learners?

a) Lifelong learning means a record of learning – the portfolios of learning in different stages.

Lifelong learning deals with personal portfolios and the development of a curriculum vitae in quantitative terms. Most respondents seemed to have understood the term

lifelong learning well, and they generally believed that lifelong learning has been taken for granted. In a broad sense, they described lifelong learning as learning “from the cradle to the grave” and “lifewide” in terms of time (i.e., anytime) and place (i.e., formal, non-formal, and informal). They gave rhetoric statements such as *‘learning is a continual learning from the cradle to the grave’* (Subject B); *‘one can always learn new things in the course of life’* (Subject H); and *‘learning is a continuous process throughout your life’* (Subject J).

However, lifelong learning was framed with time measurement and linked to personal developmental stages in a lifespan. The respondents tended to present their lifelong learning in sequence across three significant developmental stages: adolescence, adulthood, and late adulthood. *‘We go through the different stages of learning – childhood, adolescence, and adulthood’* (Subject U). Human development is a continuous process throughout the lifespan of an individual, commencing with infancy and progressing through childhood, adolescence, adulthood, and finally, old age (Quinn 2000). Development means some forms of physical, intellectual, or social improvement through the developmental process.

It was logical and reasonable for them to think of lifelong learning in such a way. However, their notions suggested that hidden boundaries existed in lifelong learning development. Smith and Spurling (1999) worried that the lifespan of learning is to surrender to cultural stereotypes of the notional stages of development – youth is for education, young adulthood is for child-raising and earning, and old age is for retirement and dotage – stereotypical effects found by this study to exist. For example, male respondents, such as Mr. X and Mr. Y, tended to dismiss what they are interested in now such as music and Chinese musical instruments, which are not professionally beneficial, as matters that can wait until they retire. Moreover, Subject U said, *'In old age, the physiological functions (seeing and hearing) decline'*. Subject A, another female respondent, said, *'Learning should happen at a young age. Thus, I would treasure any chance of learning while I still have ample time and have no family responsibility to assume. My mother showed me a good example that family comes first'*. Subject F, a 48-year-old housewife of more than 10 years, went back to her studies at the OUHK. Such being the case, the effect of “lifespan” and “time frame” in promoting lifelong learning should be seriously addressed.

Lifelong learning is privileged and confined to a group of advantaged productive people. Most of the respondents, including Mr. X and Mr. Y, seemed to have



neglected the learning needs of people after the working age. Subject M raised a learning concern about her elderly uncle and aunt. It seemed that the third and fourth-age learners were neglected. Smith and Spurling (1999) noted that the present learning system sustains a selective and exclusive learning culture.

b) Lifelong learning boundaries - hierarchy and curriculum

Lifelong learning follows a rigid pattern and lack of flexibility. The respondents viewed lifelong learning as a learning hierarchy – a footstep to follow and a target to achieve – in terms of the structure of formal studies (i.e., primary, secondary, and tertiary and professional education). Through E814, the respondents who had different lifelong learning stories talked about their initial education and post-initial education – their educational and professional learning. Subject R said, *‘Literally, lifelong learning is about learning from the cradle to the grave. I consider lifelong learning to start after formal schooling. It is professional and economic oriented and does not include leisure activities’*.

Hierarchy itself implies that lifelong learning has an ultimate and final destination. Such a view has made lifelong learning out of context and away from the unique and individual life situation of a person. Smith and Spurling (1999) were correct to say

that the segregation of government policy for schools from policy for adults cuts lifelong learning off at the knees. There are many forms (i.e., boundaries) of lifelong learning, which the respondents in this study regarded as formal and continuous, a vocational learning.

Similarly, there are many aspects of lifelong learning, and formal learning is just one of them. Unlike the E814 respondents who had plenty of formal learning experience to share, the nurse respondents were relatively quiet when talking about their lifelong learning journey but were quite vocal about their leisure and work-related lifelong learning experience. Subject V said, *'Lifelong learning can be classified into two streams: vocational and leisure activities'*.

Learning is lifelong and lifewide, happening at all times and with many facets of life. Faure et al (1972) claimed that lifelong learning has not only lifelong but lifewide dimensions. *'Lifelong learning is about being and becoming'* (Editor 2005, p.284). In general, a number of respondents mentioned about learning at work or their leisure activities. Subject R said, *'Learning happens around your life. Even attending a social gathering is a kind of learning... learning has purposes... and learning is endless'*.

Mature-aged respondents like Subjects B, C, and F shared more about their work and

life experiences. Course coordinators (Mr. X and Mr. Y) and Subject F also reviewed their learning plans after retirement.

In this study, along with life and living, the respondents suggested that lifelong learning is structured and bounded by two sets of lifelong learning curricula: a) an overt preset curriculum with structure and boundary and b) a covert real life curriculum. These two sets of curricula support and complement each other to enrich the lifelong learning process. However, the respondents generally put aside or paid little attention to their own needs for personal development and leisure activities. Most of them maintained a rigid boundary between the preset curriculum (overt) and real life curriculum (covert).

The preset curriculum of lifelong learning is construed as formal learning in which the products/processes of teaching and learning are structured, organised, recognised, and even accredited in the different stages of life. The preset curriculum includes traditional general education (i.e., primary, secondary, and tertiary education) and is extended to organised learning related to professional and career development. The study of formal education is meant to pursue qualifications (i.e., outcome/product/quantity of learning) and theory/knowledge. According to Smith and

Spurling (1999), the signs of formal learning include going to a special place of learning, finding a teacher, finding time to engage in learning, paying a fee, buying materials, seeking a qualification, and having a learning schedule not primarily intended to be fun.

Nurse C said, '*Lifelong learning is the need of the society, and we are living in a knowledge-based society*'. According to O's TMA 1, '*Knowledge is power. Learning faster gives you more power*'. To the respondents, lifelong learning can be viewed as formal and continuous in relation to professional/vocational development. According to Smith and Spurling (1999), there are three levels of qualifications that can meet the needs of individuals and employers: foundation, advanced, and higher (i.e., university degree and post-initial learning). Without qualification, the incentive to learn would be less.

To Subjects B and D, life itself is about problem solving and decision making. Therefore, the real life (covert) lifelong curriculum covers such exercises that take place everyday at home and at work as decision making and problem solving – unstructured and un-preset. Real life learning refers to non-formal and informal learning, covering the practice, process, and quality of learning. Non-formal and

informal learning in handling decisions or problems and managing work experience always exist in real lives but are frequently taken for granted. According to Editor (2005), lifelong learning is now almost equated to work-life learning when its meaning is colonised by the dominant institutions of contemporary life.

c) Lifelong learning is intentional, based on the choices of an individual and the calculation of benefits.

Lifelong learning is geared towards learning activities involving intentional and voluntary participation along with supposedly careful planning. According to Subject D, '*Lifelong learning is learning in all stages of life consciously with attention, target, plan, and purpose.*' For Subject U, '*We are more independent and autonomous in learning as an adult.*'

Smith and Spurling (1999) argued that not everybody wants lifelong learning for the same reasons. For example, humanists, moralists, employers, artists, academicians, and statesmen have various expectations on lifelong learning. Therefore, people should gain appropriate knowledge quickly when they need it to maintain their learning ability for the next stage of the lifelong journey.

Lifelong learning is regarded mainly as investment and consumption. Subject E said, *'Treating learning as consumption rather than investment would make me feel more comfortable. Otherwise, then I would have made a lot of worst investments. If I take it as consumption, then I would definitely enjoy lifelong learning'*. Nurse G said, *'It is passion to study for a bachelor's degree'*. Mr. Y said, *'In a knowledge-based society, career advancement cannot rely on experience alone. We need a ladder – qualification – to climb up on'*. According to Smith and Spurling (1999), learning can be treated as an activity that has benefits and costs only for the learner, whether as a private and individual investment or as an act of consumption.

While reflecting upon their learning experience, the respondents appeared conscious of and concerned about learning with intention, that is, intentional learning. Their intentional learning focused not only on the purposes of the study but also on calculating the cost-effectiveness or benefits of learning. They consciously made their decisions or choices to consider learning or not. According to Smith and Spurling (1999), people weigh the offers of learning providers: their costs and benefits against the opportunity costs. Opportunity costs have two aspects. The first aspect (i.e., standard technical meaning) is the loss of net benefit from alternative activities, which would have taken place otherwise were it not for the learning. The second aspect

focuses on the wider psychological and cultural cost often involved in the process.

While the respondents were autonomous learners, they studied in the learning market.

According to Taylor et al (1997), the ideology of choice is linked to the consumerist notion of the 'right of individuals to choose in an unconstrained market'. Tuijnman (2002a) argued that many researchers today still equate lifelong learning to adult education, which is defined as organised educational processes whereby persons regarded as adults by the society to which they belong engage in systemic and sustained learning activities. Cribb (2004) observed that the right market strategy could recruit more students and that incidentally, lifelong learning opportunity in Hong Kong is largely market driven.

Apparently, what the respondents believed and did was in accordance with the literature. Knapper and Copley (1997) stated that lifelong learning is a deliberate, conscious activity. Intentional learning has a definite, specific goal, which is the reason why learning is undertaken: the learner intends to retain what has been learned for a considerable period of time. The significance of lifelong learning lies not on the reasons or goals but on the intention and deliberate actions of learning. Smith and Spurling (1999) put forward the holistic notion of lifelong learning, which consists of the empirical elements in which people learn consistently through life and a moral

element reflecting the conducts of learning. The accent is on continuity, intention, and unfolding strategy in personal learning.

In this study, what the respondents did not address was the second part of the notion of Smith and Spurling (1999) in lifelong learning. Accordingly, lifelong learning has the moral element reflecting four principles: conduct of personal commitment, social commitment, respect for the learning of others, and respect for the truth.

To the respondents, lifelong learning is a record of learning at different stages of life and is bounded by a timeframe, creating a rigid pattern and pathway in the process.

Lifelong learning has two sets of curriculum: overt formal curriculum and covert real life curriculum. The respondents signified the importance of formality in the study, and regardless of the type of contents (i.e., curricula) they underwent, their participation in lifelong learning was intentional and based on the choices of and benefits to an individual.

#### 6.1.5 What motivates students to engage in lifelong learning?

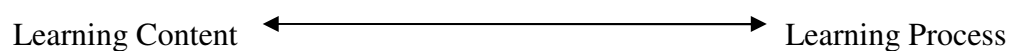
As motivation is a multi-factorial and complex matter to the respondents, it was more complicated for us to discuss it as a lifelong rather than as a single and particular issue.



According to Smith and Spurling (2001, p.7), *‘Motivation is not singled-valued; it is inherently multi-valued or fragmented, taking up different values even when directed towards the same action or decision. There are, in fact, four ways in which the different values can be categorised: by level of goal; by saliency of perception; by stages of action; and by the nature and degree of mental processing’*. They added that each individual therefore has a personal motivation system with unique precise settings. Gage and Berliner (1992) asserted that motivation influences the energy and direction of our behaviour, embracing several other terms such as needs, interests, values, attitudes, aspirations, and incentives. With reference to literature review, this study attempted to conclude that the motivations of the respondents in lifelong learning are dynamic and interactive with the multi-factors of the four continua in terms of learning (i.e., type of knowledge), goal, attitude (i.e., type of life), and commitment. This demonstrated that the pursuit of lifelong learning is life and context dependent, propelled by goals and maintained by character and commitment.

The four continua of lifelong learning to be discussed are as follows:

a) Learning



### i) Quantitative and Qualitative Learning

In this study, the process of learning of the respondents was apparently motivated by the formal studies of professional continuous development or the content of learning/qualifications; hence, it is categorised as quantitative learning. According to Biggs (1994), there are two major perspectives about learning in the conceptions of learning: quantitative and qualitative. The quantitative view proposes that learning is concerned with the acquisition and accumulation of contents, while the qualitative view suggests that learning is about understanding and meaning-making by relating or connecting new material with prior knowledge.

Lifelong learning seems to be a natural learning process occurring within the lifetime of a person at different stages of a lifespan contributing to different unique and individual experiences and stories. However, there were but a few people who took lifelong learning as continuous, context-dependent in a lifetime, and qualitative. For example, Subject B said, *'Formal education has a shorter period than lifelong learning. Lifelong learning is a process of learning for excitement, self-improvement, and knowledge'*. Meanwhile, Subject C claimed, *'Lifelong learning is learning through experience accumulation and sharing'*.

Ng and Young (2000) noted that lifelong learning refers to the learning process (i.e., informal learning), while lifelong education refers to the structural and methodological aspects. This reduces the emphasis on the role of structures and institutions and puts the individual at the centre instead. Smith and Spurling (1999) argued that there is a distinction between learning and the learned. Scenarios where learning is being done (high volume) but where it is fragmented and aimless (low commitment), or is unintended cannot be lifelong learning.

#### ii) Learning and Knowledge

Therefore, most of the respondents in this study believed learning and knowledge in terms of the didactic/reproductive rather than the facilitative/transformative approach. According to Kember (2007), the didactic/reproductive belief holds the notion that teaching is a didactic process of transmitting knowledge; knowledge is defined by an authority, and knowledge and theories are either right or wrong. By contrast, the facilitative/transformative belief holds the notion that teaching is a process of facilitating learning; knowledge is transformed or constructed by an individual, and judgments have to be made about alternative theories based on evidence and analysis. Smith and Spurling (2001) posited that learning is taken as a process of acquiring knowledge or skill that adds significantly to the understanding and experiences of the



## ii) Social and Political Goal

Cribbin (2002) mentioned that the current popularity of lifelong learning is derived mainly from the political context wherein lifelong learning is unreservedly considered a good thing, an exhortation to good citizens to take on lifelong learning almost as a duty and as a means of economic salvation in a knowledge-based economy. Along this supposition, the learning needs of the respondents are predominantly social and survival oriented, the intention of which is mainly instrumental and obviously extrinsically motivated. According to Smith and Spurling (1999), economic prosperity depends on the competitiveness of a country, both at home and abroad, and that a key way to do this is by building up the knowledge and skill of a nation. It would then be categorised as instrumental learning.

## iii) Individual Goal

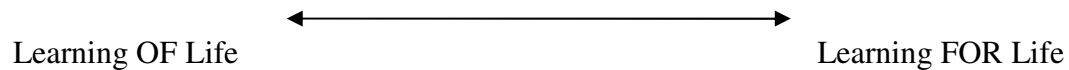
Lifelong learning should not be confined to social needs. In classical Chinese, lifelong learning is regarded as both an individual and a social ideal. According to Field and Leicester (2000), the UNESCO vision of lifelong learning is about a more equitable distribution of educational opportunities based on a humanistic tradition leading to positive social and individual benefits. Stoll et al (2002) added that learning is intellectual, social, and emotional. Subject E said, '*Learning in life enhances one's*

*self-esteem and self-confidence*'. On this Subject F said, '*Learning maintains one's mental function and boosts one's confidence*'. Mr. Y maintained that lifelong learning serves both instrumental and expressive functions. Moreover, he said that the learning needs of the respondents were predominantly personally oriented and needed improvement, and that the intention was mainly expressive and obviously intrinsically motivated.

In this study, the learning goals of the respondents were apparently extrinsically motivated. Nevertheless, this study would not simply jump to conclude that the respondents were driven purely by extrinsic motivators, as this study was aware that inherent and synergistic responses take place between extrinsic (i.e., qualification and job security) and intrinsic motivators (i.e., self-improvement and psychological well-being). Woolfolk (2008) elaborated that the essential difference between intrinsic and extrinsic motivation is the reason of a person for acting, that is, whether the locus of causality for the action is inside or outside the person. If the locus is internal, the motivation is intrinsic; if the locus is external, the motivation is extrinsic. Most motivations have elements of both. Kennedy (2002c) argued it would be somewhat naïve to suggest that the Hong Kong students of today are any more pragmatic in their concern with the extrinsic value of a post-secondary education than was the case in

former times.

c) Attitude



i) Attitude of Learning and Philosophy of Life

The learning attitude is the keynote of lifelong learning in terms of what, when, how, and why to learn. At its core, the pursuit of lifelong learning is dependent on one's philosophy in life and learning cultivated privately at an earlier point in life. According to Smith and Spurling (1999), lifelong learning individuals consistently learn over time with an unfolding plan of learning, expressing the proactive attitude and involvement of committed learners.

In the study, the informants shed light on the importance of learning attitude and life philosophy in lifelong learning in their experience sharing. According to Hallam (2007), learning occurs in relation to emotions, attitudes, and beliefs. Longworth (1999) also pointed out that lifelong learning values and attitudes are as important as lifelong learning skills and knowledge. The Reform Proposals for the Education

System in Hong Kong published in September 2000 stated that Hong Kong will develop into a society that values lifelong learning. Everyone will have the attitude and ability for lifelong learning or the willingness to advance further beyond the existing knowledge level and to consolidate and upgrade their knowledge and ability continuously. In addition, there should be diversified learning channels and opportunities to meet their learning needs.

Naturally and normally, our lives are full of problems and challenges, happiness, and sadness. People with different philosophies (i.e., aims) in life react differently to a similar situation. In the end, the philosophies in life affect the attitude of a person in pursuing lifelong learning. According to Lawrence and Nohria (2002), as the learning process progresses over the life cycle, individuals accumulate their own increasingly comprehensive and coherent worldviews, as well as a complex set of beliefs about themselves called self-concept or self-identity. These self-beliefs provide the basis for the self-esteem of every unique human being. Growing up in a broken family made Subject F understand that her learning and living were geared towards finding the means to provide for her basic needs (food), while Subject E, who could meet his needs, treated learning as a consumption activity.



Leonard et al (1995) indicated the importance of the roles of internal and external self-concepts in motivation. In the study, the respondents chose to participate in lifelong learning against all odds. According to Boshier (1971), participation is more likely to result if there is some congruence between the learner's view of him/herself (self-concept) and the nature of the educational programme and environment. Deci and Ryan (1985) mentioned that any well-adjusted identity of an individual emanates from multiple selves (work self, social self, religious self, and family self). Jarvis (1997) was correct in saying that in the process of experiencing change, the identities of an individual are no longer stable, and identity crises become more apparent. Education, however, can assist in this process.

In addition, the respondents mentioned that lifelong learning is both a learning process and an outcome. In other words, it can also be a means to and an objective of living. Gage and Berlin (1992) claimed that motivation could serve as both an objective in itself and a means to furthering achievement of educational objectives. The respondents in this study reflected their "attitude of learning while making decisions in lifelong learning in terms of how, when, what, and why." This stems from the life philosophy of a person, which influences his/her strategies and practices in lifelong learning. In the practice, people should be encouraged to stand back to reflect

on their philosophy in life and learning. Smith and Spurling (2001) argued that many people seek to organise their actions according to a kind of goal hierarchy, deliberately or otherwise, while in real life, individuals may have a number of life goals, declared or otherwise.

#### ii) Learning FOR Life

The process involved in learning FOR life is a means to an end/achievement.

According to Woolfolk (2008), there are three kinds of values relevant to achievement:

attainment value, utility value, and intrinsic value. Attainment value is determined by

how a task or a domain fulfils the need of a person. It concerns the relevance of an

activity to the actual or ideal self-concept of a person. People engage in activities and

develop competencies that are consistent with their real and desired concepts of

themselves (i.e., being feminine, musically talented, popular, socially deviant, or

hardworking). Utility value concerns the usefulness of a task as a means to achieve

goals that may not be related to the task itself. Intrinsic value is the immediate

enjoyment one receives from doing a task.

#### ii) Learning OF Life

Learning OF life (as opposed to learning FOR life) is the central stage of lifelong

learning, which begins in the cradle and ends at the grave, and embraces democratic participation, personal fulfilment/recreational learning, and the aging process in addition to economic and employment imperatives (European Commission, 1996).

The process involved in learning OF life is an end itself. One should learn to explore his/her interests to achieve a sense of self-fulfilment. Maslow's (1971) hierarchy of basic needs starts with the bottom physical needs – food and shelter. Once these needs are satisfied, social needs come into play. They are shortly followed by the urge to satisfy intellectual needs and then to express aesthetic needs, before fulfilling the highest level: self- actualisation. Therefore, learning OF life is meant to achieve the higher level of the needs hierarchy, while learning FOR life aims at the lower level. In other words, learning OF life is a proactive learning attitude, while learning FOR life is reactive.

Subject D, believing that one should develop a perfect self in his/her lifespan, held on to the philosophical principles in which one must survive, reproduce, learn for improvement, overcome barriers, make decisions, and integrate life and knowledge.

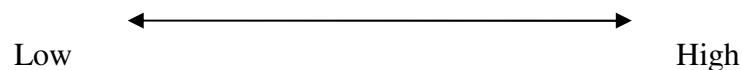
Subject D appeared to be a true master of learning.

To promote lifelong learning, one should shed light on the intrinsic drives of learning, such as intrinsic process motivation (i.e., enjoyment, fun), goal internalisation (i.e., self-determined values and goals), and internal self-concept-based motivation (i.e., matching behaviour with internally developed ideal self) (Leonard, Beauvais, and Scholl 1995). Field and Leischester (2000) argued that education must be seen as an intrinsically valuable activity, which is something that is good in and for itself rather than an instrument for the achievement of an extrinsic goal. The respondents generally believed that the best way to maintain motives in lifelong learning was to learn something they were “interested” in. They also seemed to obtain satisfaction from learning not just from the material but from the psychological rewards it accords.

Lifelong learning for life simply means that people learn to live, using learning as a means or strategy to achieve predetermined tasks, improve their qualities as a person, and be prepared for particular developmental stages in life. These views of lifelong learning were commonly shared by the respondents. Harrison et al. (2004) added that lifelong learning has learning strategies to attain lifelong studies or education for external rewards, such as qualifications and promotion. Learning as a preparation for life has been displaced by learning as an essential strategy for successful negotiation

of the life-course, as the conditions in which we live and work are subject to more rapid changes.

d) Commitment



i) Learning and Commitment

According to Smith and Spurling (1999), lifelong learning is intended and planned. Morally, there is a personal commitment to learning, that is, an individual takes a personal interest in his/her learning and takes a large measure of personal responsibility for carrying it through successfully. In the study, the respondents were inclined to compare formal schooling with lifelong learning. They identified two things in which lifelong learning was distinct from formal learning: (1) the freedom of choice and autonomy over lifelong learning, and (2) the personal approach taken in lifelong learning. As a result, they were more conscious of thinking about how they chose to study subject matters, career-related or not, that interested them.

## ii) Commitment as Interest

This case study found that the respondents were committed to their lifelong learning, mentioning the term “interest” that helped to sustain their short-medium term of learning. Woolfolk (2008) claimed that there are two kinds of interest, namely, *personal* (individual) and *situational*, echoing the trait and state distinction. Personal or individual interests are the more enduring aspects of the person, while situational interests are the more short-lived aspects of the activities, text, or materials that catch and keep the attention of a student. In the case studies, the respondents only pursued their short-lived interest to finish specific tasks in a specific period. Longworth (1999) was correct in saying that lifelong learning aims to create or recreate the habit and the joy of learning. “Interest” did help to make the learning experience of the respondents more fun and enjoyable.

## iii) Commitment as Self-efficacy

Woolfolk (2008) noted that self-efficacy is our belief about our personal competence or effectiveness in a given area. People with a strong sense of self-efficacy for a given task tend to attribute their failures to lack of effort, but people with a low sense of self-efficacy tend to attribute their failures to lack of ability. Most of the respondents showed their determination and perseverance in studying by convincing themselves to

“never give up.” They seemed to attribute their success in learning to the efforts they put it.

#### iv) Commitment as Willingness

In the study, the respondents showed their extreme willingness to continue their learning (i.e., qualifications). Geen (1995) said that simply having an incentive to strive for a goal does not guarantee that the person will actually undertake the effort required. Goal striving also requires an act of will that comes after commitment. Will is manifested in conscious effort if two conditions are met: (1) the task must be sufficiently difficult that effortless behaviour will not result in the attainment of the goal, and (2) the person must believe that he/she has sufficient control over the outcome to be assured of reaching the goal with the required effort. Other than the difficulties of the tasks, there are still other deterrents and problems (to be discussed later), such as family burden and aging, which must be considered in the commitment to lifelong learning.

#### v) Efforts and Ability in Commitment

In this study, it was believed that to sustain lifelong learning, a lifelong learner should demonstrate the necessary efforts and ability (i.e., skills), which however were not

mentioned by any of the respondents. Nonetheless, during the interviews, the informants reported the difficulty of the learners in the English language. Apparently, the respondents were over-confident and lacked proper time management and self-discipline. To facilitate the understanding of the role of skills in committing to lifelong learning, some references are quoted below for reference:

The UNESCO Commission on Education for the 21<sup>st</sup> Century (Delor 1996) described the four pillars of education as follows:

- Learning to be: the right to self-identification, self-definition, and self-esteem
- Learning to know: the right to self-knowledge and learning to learn
- Learning to do: the right to self-development and employment
- Learning to live together: the right to self-determination, to work in groups and teams, and to resolve conflicts

Maslin-Prothero (1997) and Smith and Spurling (1999) suggested lifelong learning skills as those that involve radical thinking, creativity, communication, and personal effectiveness, which are needed as much as old-style vocational competencies and transferable skills, including capabilities in problem-solving, critical analysis, data analysis, the use of literature, verbal and written communication, time management, team working, information technology, and project planning and management, as well



as independence, self-reliance, self-enquiry, self-confidence, and self-discipline.

The motivation of the respondents in lifelong learning was multidimensional and encompassing. They seemed to be highly committed and determined to pursue lifelong learning for learning FOR life, formal studies, and social goals. They tended to gear towards one side of the continua.

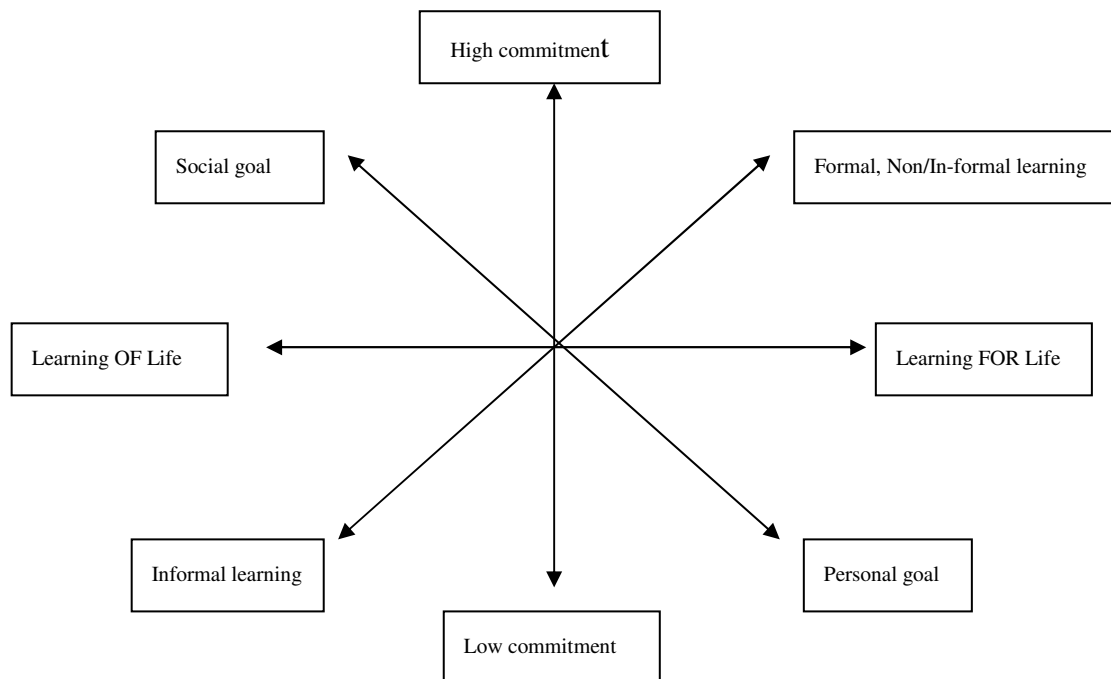


Fig (i) Motivations in Lifelong Learning

The framework of the motivations in lifelong learning is multidimensional. The motivations of the respondents in lifelong learning were dynamic and interactive with the multi-factors of the four continua in terms of learning (i.e., type of knowledge), goal, attitude (i.e., type of life), and commitment. This demonstrates that the pursuit

of lifelong learning is a life- and context-dependent learning with goals and is maintained by attitudes and commitment. This study showed evidence that all (A-H) the respondents would pursue both formal and informal studies during lifetime learning. While the attitude (i.e., philosophy) towards life affected the goals and contents of learning regardless of age and gender, Subjects A, E, F, G, and H who took learning FOR life focused their learning on formal studies and social good. Subjects B, C, and D favoured learning OF life with emphasis on informal learning for personal improvement. In short, they were more likely to be extrinsically motivated in lifelong learning and committed to the goals they thought important.

#### 6.1.6 What deters students from engaging in lifelong learning?

It would be easy to say that the respondents who aspired for personal goal adhered to learning FOR life and had high commitment, while those who were keen on informal learning were highly motivated lifelong learners. In other words, a person could be deterred from lifelong learning if he/she only yearned for social goal, adhered to learning OF life, and had low commitment and compliance to formal/non-formal learning. It would be interesting to know what made the difference and what the deterrents were.

However, for whatever reasons and manners the respondents participated in lifelong learning, the respondents in this study represented a group of people who were willing to participate in lifelong learning. In their particular cases, they also had to face difficulties and problems, such as financial and family burdens as well as the lack of time to study. The obstacles in lifelong learning identified by the respondents were similar to those outlined and considered most important by McGivney (1993) and Schrader-Naef (1998): situational (i.e., time and costs), institutional, and psychological/dispositional and psychological factors such as previous learning experiences, self-concept, expectations, and attitudes towards schools, teachers, and learning. Subject E noted that which course to be studied was a market issue. The respondents asserted that government support and policy would ease their burden to a certain extent. To help develop lifelong learning, they believed that psychological factors, personal experiences, social policies, development of learning organisations, and communities of practice were significant as evidenced by the pre- and post-course evaluation.

In this study, the respondents of E814 in particular, considered culture (i.e., gender) and biology (i.e., age) as the deterrents in pursuing lifelong learning. For example, Subject G felt that her lifelong learning was not supported by her relatives just

because she is female. Subject A said she might follow the footsteps of her mother by giving up learning to take care of her family wholeheartedly. Subject F became a housewife at a young age, and she only went back to her studies when her daughter was old enough. Smith and Spurling (1999) noted that gender stereotyping in learning is important. Many young women who fail or reject the academic route and who veer away from further education into stereotypical jobs or unemployment are drawn to motherhood as a familiar route to social status and authority. However, this is often an entry into a non-learning trap. Women who do embark on professional careers must be prepared to face series of possible dilemmas in balancing professional and family development. Men are typically less constrained. This study showed that female respondents found it difficult to resist the cultural influence. The number of males and females was quite even in the E814 cohort. Indeed, male learners seemed to gain an upper hand over their female counterparts, with more male E814 learners having a higher degree (i.e., master's) than the females.

As noted by Subject M, some irreversible factors of aging and ill health possibly deter people. Smith and Spurling (1999) acknowledged that when final physical decline sets in the "fourth age" quite rapidly, the interest and capacity for learning do start to fade. A pervasive ageism marginalises and patronises older people.

Inadequate personal (i.e., psychological, family, finance, and experience) and social and cultural support (i.e., government policies) were considered the main deterrents. The respondents added the significance of culture (i.e., gender) and biology (i.e., age) deterrents in pursuing lifelong learning.

6.1.7. What are the current and the anticipated problems faced by students engaged in lifelong learning? How do they manage to solve these problems? What support do they receive?

Throughout their lifelong learning journey in obtaining academic achievement and continuous professional development qualifications, some of the respondents found different ways that best befitted them to accomplish their goals. They made their own choice and decision in learning as consumers of lifelong learning. They put in their best effort to complete and pass the course. Harrison et al (2004, p.2) suggested that *'learning as a preparation for life has been displaced by learning as an essential strategy for successful negotiation of the life-course'*.

a) Difficulties Encountered in Lifelong Learning

i) Part-time Learning

Although the respondents were able to foresee difficulties in lifelong learning in the

part-time mode, they generally felt and reiterated that studying was a stressful experience to working adults who had many commitments and responsibilities, particularly in finance, work, and family.

ii) Distance and Open Learning Mode

The respondents also experienced learning difficulties inherent in the distance and open learning mode. They studied at home and relied on themselves in facing the demanding workload of the study, including course materials, assignments, and examinations. Kember (2007) claimed that novice students of distance learning who have become used to studying in a classroom full of fellow students may experience a transition to a mode of education characterised by the absence, for most of the time, of a teacher and/or student peers.

iii) Self-financing as Investment and Consumption

Taking self-financed accredited courses in the OUHK was expensive. The respondents were mature working adults who felt that fees were a problem (i.e., financial burden) to them. Smith and Spurling (1999) claimed that lifelong learning cannot float on hot air or on good intentions. The EC (2000a) stressed that lifelong learning is a personal investment from which learners gain individual benefits, and thus they should pay for

themselves. According to a survey of executives holding supervisory or managerial roles, tuition fees are considered an integral part of their investment portfolio (Standard April 7 2008, Supplement p. 18). The respondents did not resort to borrowing money from anyone just to support their studies when facing financial difficulty, as it would only add unnecessary stress to them.

Instead of taking learning (the so-called entry ticket) as investment, some regarded it as consumption. In Hong Kong, as is the case elsewhere, there are strong economic justifications for investing in lifelong learning. Continuing education has a consumption side to it as well as an investment side (Chung et al., 1994). To some of the respondents, this personal economic view had a positive effect on learning.

#### iv) Inaccurate Estimation of One's Ability Affecting Lifelong Learning

Lifelong learning through the distance, open, and part-time learning modes is not easy. Learners had to plan their study properly in advance in terms of monetary allotment and time management of work, family, and rest. Due to the course structure and reduced tutor-student interaction, OUHK learners were expected to have good time management and self-discipline to initiate their own learning.

In the study, Mr. X claimed that OUHK learners seemed to have overestimated their abilities such as in time management and self-discipline, failing the required performance in these areas. Learners were used to the passive and spoon-fed learning and had difficulty in adopting active learning, demanding more face-to-face contacts with tutor in understanding the learning materials. They hardly had adequate time and self-control/initiative to prepare for the tutorial sessions and complete the assignments on time. They were expected to ask for deadline extensions for each assignment. Some learners who did not have pre-requisite knowledge due to the lenient entry requirement only increased their learning work load and deepened their learning problems. Some even had difficulties in using the English language to learn.

The respondents apparently lacked the necessary lifelong learning skills and knowledge. Maslin-Porthero (1997) and Smith and Spurling (1999) argued that there are essential skills that lifelong learners can acquire, such as self-awareness and self-development skills; ability to understand the values of lifelong learning and the courage to apply them; and ability to think inductively and deductively.

v) Managing a New Way of Learning in Furthering Formal Studies and Informal Learning



For particular OUHK learners, active learning is an integral component in lifelong learning but not so with other Chinese learners. The respondents recalled their previous experiences during their school days (i.e., secondary to tertiary education) as unpleasant, passive, and spoon fed. The traditional knowledge transmission process from teachers to students required students to study the course materials well, remember what they were taught, and obtain satisfactory results. Kennedy (2002b) noted that notions of effective teaching are rooted in cultural values and social norms, and the perceptions Chinese teachers (and students) have of their roles, responsibilities, and relationships need to be acknowledged and handled sensitively during the change process.

Under the influence of the Chinese culture, the teacher-centred approach made the respondents become passive learners and rote learners. In this study, teacher-centred, examination-oriented, and spoon-fed pedagogy were well adopted in lifelong learning practice by the respondents. The primary goal of a learner was simply to “pass” and get just enough “qualification” to proceed to the subsequent levels of education, a mediocre survival skill. Quinn (2000) was concerned about the over-reliance on teaching methods involving the transmission of information with assessment methods that encouraged the superficial reproduction of facts, causing the learners to study for

the sake of grades but without the essential in-depth understanding.

The respondents took an instrumental, materialistic, and surface approach in learning, aiming to have a “passing” grade for their written assignments and examinations.

Surface learning approach is the reproduction of sufficient detail to meet demands minimally (Biggs1994). Mr. X and Mr. Y shared their views on learning and showed their understanding and sympathy to those who studied for instrumental function.

To these experienced and educated learners, learning in OUHK was not easy, as they shifted from being passive to being active participants. Kember (2000) noted that the impression that Hong Kong students prefer passive learning and resist teaching innovation could have little or no foundation. Venter (2002) shared her experience with her distance learning students being more accustomed to non-participative learning. Gardner (1989) noted that the predominant approach of learning and education in China stresses on “performance” and “one correct way to do things,” while “education for understanding” emphasises the expressive, creative, and comprehensive powers of the students.

Learning strategies are dependent on context, but the respondents did not clearly elaborate on it. They generally felt that qualification alone was not adequate and that ability and experience were also important in real life situations. They realised the importance of informal learning from their respective working experiences. Therefore, Biggs (1994) saw the interaction between learners and learning context as a metacognitive activity and called it metalearning. Unlike in formal studies, the respondents took different approaches to life learning. They employed a transformative and deep learning approach in their daily working environment for life and job enrichment. According to Biggs (1994), deep learning approach is meant to understand and come to grips with the heart of the problem. Kember (2007) noted the different approaches taken by older and younger students. Older students are inclined to use a deep approach and are intrinsically motivated, while transformative learning arises from individuals who have a framework of reference for interpreting their experiences based on what happens to them and what they hear and read (Williams 2001). However, in the study, such ways of learning were far from being well described, explained, and documented by the respondents.

#### b) Problem Solving

The strategies of the respondents in managing their learning difficulties seemed to be

limited.

i) Self Support rather than from Group Learners

Lifelong learning experience is generally solitary, except for students such as Subject B and some NU305 OUHK learners who decided to form a study group. In most cases and in the interaction of the author with the learners, peer group support is ideal but is not a common practice in the OUHK setting. Respondents were alone when it came to managing their own learning probably because they were mature adults and independent problem solvers. However, Maslin-Porthero (1997) advocated that socialisation may encourage lifelong learning. Therefore, the respondents might have missed the learning opportunities by working alone. According to Kember (2007), there is evidence that in the Confucian heritage and probably in other more communal societies, peer learning is both preferred and beneficial. He suggested for flexibility to be allowed in distance education by arranging self-study groups in the course design to incorporate activities suitable for group interaction.

ii) Strong Personal Traits

The respondents displayed resilient traits. According to Geen (1995), goal striving requires an act of will that comes after commitment. To make their learning investment a success, the respondents in this study became resilient in pursuing their

studies, showing their perseverance, determination, and even willingness to sacrifice their relationships with their families and enjoyment (leisure activities). Being exhorted never to give up could help them move on and maintain their buoyant spirits. OUHK learners apparently had zero tolerance about their “failure,” as they were unwilling to say NO. The respondents seemed to have the following traits in facing learning difficulties or problems in lifelong learning: resilient personalities, strong ego, self-discipline, self-confidence, self-awareness of their own strengths and weaknesses, optimism, adaptability, resilience to difficulties and problems, good planning skills, positive learning attitudes, and ability to learn from vicarious experiences. The respondents apparently had an internal locus of control. According to Gage and Berliner (1992), persons with internal locus of control attribute their success or failure to their own behaviour (i.e., personal effort or ability); while those who attribute their success or failure to luck or task difficulty are said to have an external locus of control. As such, Buckley and Caple (1992) noted that motivational readiness depends on the cultural or educational background or emotional disposition of a person.

### iii) Social Support from Families and Friends

Support and understanding from close friends and family members are of utmost importance in the whole lifelong learning journey. Taking learning as consumption

rather than as investment also makes studying fun. Although alone, OUHK learners seemed to be resilient in managing their own problems.

To the respondents, lifelong learning as an investment is not an easy task. They had to deal with financial (i.e., user pay principle) and learning difficulties (i.e., time management and learning styles) alone with limited sources of help.

#### 6.1.8 Is it essential to develop the ability for reflection and critical thinking when engaging in lifelong learning?

The respondents generally viewed reflection and critical thinking as the integral process and strategies of learning and demonstrated good understanding about their theoretical framework, application, and implication in learning. E814 course members were able to link reflection and learning process to experience. They considered critical thinking as the act of reviewing, challenging, and questioning experience and other different assumptions, discourses, and perspectives.

In pursuing lifelong learning, one should be able to challenge and critique knowledge and beliefs to make informed choice and decision as befits true learning, which should reflect life experiences. People must decide for themselves, adjust to social changes,

and keep on learning (Jarvis 2002). This is “learning all the time,” a necessary feature of reflexive modernity. In reflexive modernisation, learning, both reflective and non-reflective, to individuals happens more often throughout their lives.

Critical thinking in lifelong learning is important but is not easy to practice because of certain cultural constraints. According to Smith and Spurling (1999), critical thinking is a key lifelong learning skill that must be developed in all parts of the learning facets and that is not a prerogative of graduates. It enables people to challenge received wisdom and to determine hypocrisy and double standards. As a good element that must be incorporated into lifelong learning skill qualifications, critical thinking and action must be exercised by a lifelong learner. Subject D even believed everyone, whether or not a lifelong learner, must practice critical thinking.

The roles of reflection and critical thinking are of utmost importance in lifelong learning. However, throughout the course, many of the respondents, even those at the master’s level, to a certain extent expressed difficulty in attaining the highest level of learning in their academic study and real life. E814 learners had difficulty in writing reflective journals and attaining the highest level of cognitive learning in terms of Bloom’s (1956) taxonomy: knowledge, comprehension, application, analysis,

synthesis, and evaluation. Having been used to the spoon-fed approach, critical thinking and reflection abilities became gravely compromised. Smith and Spurling (1999) argued that the development of critical skills was delayed in the British system because of the authoritarianism, paternalism, and spoon feeding of the golden standard of school culture. There was no reason why young people should work out their skills of critical thought, word, and action.

According to Lau (2006), teachers cram eclectic fields of knowledge into their students, no matter how much the students are able to absorb. Students cram in public examinations. With these teaching and learning styles, it is impossible for students to develop their creativity and reflect on their opinions. Eva Lo (2008), the Director of Knowledge Management at Langham Place (a shopping mall), added that the educational system of Hong Kong still relies on rote learning, forced feeding, and examinations. This does not encourage creativity, innovativeness, or curiosity.

Subject C, Mr. X, and Mr. Y held a common view that critical thinking is readily accepted by the society in real life situations.



Critical thinking is considered sheer rhetoric, something just for talking and not for doing. As such, people are taught to conform to the social norms, to meet the expectation of the established traditions, and not to be critical.

#### 6.1.9 Why did people choose the distance learning mode?

##### a) Time and Space and Distance and Open Learning

In previous studies, the respondents were confounded by the concepts of distance, open, and flexible learning that characterised the OUHK. However, in their own words, the OUHK was attractive in terms of its openness and flexibility. Robinson et al. (2001) referred to open learning as a set of values pertaining to the removal of barriers to learning and access, flexibility of provision, choice on the part of the learner, and provision of resources to support learning. While open learning is relevant to flexibility, the author believed that Quinn (2000) had well summed up the views of the respondents with regard to the controversial issues of distance and open learning mode. According to Quinn (2000), the distance and open learning mode also provides flexibility in study in terms of course structure: no regular and tight lecture attendance required, open access to everybody, and limited restrictions in entry requirement. Both distance learning and open learning programmes under flexible learning offer opportunities for student control over the elements of the programme. It

seemed that the distance and open learning mode of the OUHK met the needs of the respondents.

As reflected by the respondents, the OUHK played a unique role in tertiary education as open and distance learning changed the concept of space and time in learning.

Jarvis (1997) noted that educational institutions still, to a large extent, rely on local and instantaneous transmission of knowledge. The learners have to be present when the lecture is delivered. In an information-based society, there is a market for space-time distancing and space-time compression. Knowledge can be transmitted and learned not at the convenience of the teachers but that of the learners. According to Smith and Spurling (1999), people have to make decisions about learning time as measured in minutes, hours, and days. Space and place, the designed learning environment supplied by providers, is beyond doubt the central issue in lifelong learning. Therefore, it was correct for the UNESCO (2003) to say that distance and open education represent approaches focusing on opening the access to education and training provision, freeing the learners from the constraints of time and place, and offering flexible learning opportunities to individuals and groups learners. Kember (2007) noted that the freedom of time and place to study is an important element of openness for mature students with family and work commitments.

## b) Other Incentives

The OUHK encourages more people to receive tertiary education in part-time mode without quitting their jobs and without the stringent entry requirement. The OUHK's transferable credit system institutions also offer an extra incentive for people to study in the OUHK. The respondents chose the OUHK because, to a certain extent, they could have more control over their studies. Field (1996) hinted that consumers may purchase open learning resources largely for purposes of self-gratification and/or personal autonomy, while their participation in the open learning fosters the differentiation of individual identities. According to Jegede (2001), the OUHK's model of open and distance education shows six distinctive characteristics: open access, distance learning as the instructional delivery platform, credit system, credit transfer system, assessment, and rigorous built-in quality assurance in all its operations.

Moreover, the distance and open mode of learning provides the respondents a lesser competitive learning structure and environment, causing them to feel competent--an incentive of learning in the OUHK. The respondents were not keen on cooperative learning structure as opposed to the description given by Gage and Berliner (1992), in which accordingly, high-ability members and low ability members of the group work

together to achieve a reward. Furthermore, the respondents chose to study in the OUHK because the workload was lesser compared with that of other Hong Kong traditional tertiary institutes that require more student activities, such as group projects and presentations. Above all, as a self-financed institution, the OUHK allows concurrent registration with other Hong Kong tertiary institutes.

The respondents were confused about the concept of distance, open, and flexible learning in the OUHK. The respondents underscored the issues of “open” and “flexibility” when they chose the OUHK to continue their studies. The respondents apparently enjoyed the less frequent and less regular lectures and the more freedom and autonomy in determining their learning, which characterise the “open” entry system.

6.1.10 To what extent is OUHK’s approach, which includes open, flexible, and distance learning, helpful for students in lifelong learning?

a) Contribution to Higher Education and Knowledge-based Economy

The respondents found the OUHK, Hong Kong’s sixth degree-awarding institution, beneficial to their lifelong learning in two ways. First, OUHK’s distance learning programme and instruction mode offered learning opportunities for busy adult

working learners and family caregivers who had no time to attend face-to-face lectures to pursue their formal studies. Robinson, Than and Vuong (2001) referred to distance learning as a set of arranged teaching and learning. In other words, OUHK helped increase the participation of lifelong learning in higher education and knowledge-based economy.

The OUHK helps learners to acquire the necessary academic knowledge and skills in a knowledge-based society through mass higher education to maintain Hong Kong's economic growth and competitiveness. Cribb (2004) hinted that in Hong Kong, as in many other places worldwide, lifelong learning has become a concept welcomed by the government as embodying the perception that economic success in a "knowledge-based economy" will only be secured through a workforce that continually refreshes and updates its skills in response to the increasing demand for human assets in a knowledge-based economy.

The respondents indicated that the OUHK serves to provide accredited courses (specialisation) for people living in a knowledge-based and economic society for professional and societal development, fills the gaps in the shortage of university places, facilitates a responsive and market-oriented lifelong learning, and promotes

the thinking and analytical skills of the learners through academic learning and practice of reflective and critical thinking.

Second, the OUHK, through its open learning mode, widens the participation in lifelong learning by allowing a second chance at learning for adults without pre-requisite knowledge but with the willingness and determination to realise their dreams of attaining formal education. The respondents indicated that the OUHK provides learning opportunities and entry requirements that were less competitive and restrictive, as well as flexible course structure-equity education, and gives learners materialistic (i.e., qualifications and entry ticket) and psychological (i.e., second chance and academic and professional achievements) rewards.

In this case, the OUHK provides them distance and open learning, which increases and widens their participation in learning. The distance and open operation mode of the OUHK has been playing a significant role in post-secondary education since it was established as an Open Learning Institute in 1989. Its role as a recognised degree-awarding body is becoming more important in the wake of the education reform with the main theme of lifelong learning. It was correct for Jegede (2001) to note that what the OUHK, which offers opportunities for open learning using distance

education methods, has been practicing is in accordance with the education reform requiring education to be flexible and open, assuring quality, accrediting qualification obtained through various modes, and establishing credit transfer mechanism.

b) Constraints of Open and Distance learning (ODL)

First, the self as the centre of lifelong learning and ODL was not recognised and appreciated by the respondents. Holford et al. (1995) pointed out that in a distance course, the teacher and the learner are separated, and the organised self-study and students have the responsibility over their own learning. Field (1996) added that open learning implies greater accessibility, flexibility, and student-centeredness. This places the learner rather than the provider at the core of educational practice.

Similar to the time and space issue of distance and open learning, the centre of lifelong learning is the self. The discourses of adult education are about forms of provisions, while those of lifelong learning are about learners (OUHK 1996 Study Guide Section 4). In addition, the Institute of Personnel and Development (1995) claimed that Continuing Professional Development (CPD) should be self-directed and owned by the employee. Meanwhile, the proposal of the UK government for lifelong learning identified the need for increased individual responsibility for learning

(Department of Education and Employment, 1998). In the study, most respondents failed to mention self-directed learning as the important factor for them to choose. The learning of the respondents was subject and task oriented. They employed an instrumental and passive learning mode in pursuing lifelong learning. Kennedy (2002a) stated that studying in the distance learning mode requires self-reliance, learner autonomy, tolerance of uncertainty, and ambiguity, all of which would seem diametrically opposed to the values held by Chinese learners in the OUHK.

Brew and McCormick (1979) investigated the way students approached the distance learning course and found that students in such an independent study mode need guidelines about how to study and what kind of learning is desirable. Respondents B and G strongly felt that adapting the way of learning in the OUHK initially was not easy. Kember (2007) was correct in asserting that many potential students prefer face-to-face courses over distance learning.

Second, learners and qualifications from distance learning were viewed as “second class.” Abdullah (2004) mentioned that very few studies touched on the effectiveness and influence of distance learners. This study indicated that to a certain extent the role of distance and open learning was compromised, as it produced second-class learners



and second-class qualifications. Respondents such as Subject E and Mr. X both cast doubts over the quality of the learners studying through open and distance learning. Jegede (2001) noted that there is a widespread view that ODL is of lesser quality than full-time campus education. Distance education is the second-best option to traditional classroom-based teaching. Some segments of the public may perceive that Open University is easier to enter, easier to graduate from, and hence its quality is doubtful. In the first place, part-time learning through the distance and open mode focuses on course contents (specialism) rather than on general education. Without campus life, extracurricular activities, and learner-learner-teacher interaction, the holistic development afforded by a full time study will not be achieved, and thus the quality of learning in that sense will also be hampered.

Most of the respondents in the study attempted to use superficial and instrumental approach of learning in the OUHK. The strategies employed by the Council for National Academic Awards (CNAA) (1992) to encourage a deep approach to learning – independent learning, personal development, reflection, independent group work, learning by doing, learning skills and projects – were lacking in great portions in the OUHK. The self-initiated and self-help modes of learning were difficult but vital in the OUHK.

Third, slow response to the education market is to blame. According to the course coordinators, despite the shortcomings of the OUHK, the provision of the OUHK was still important in lifelong learning. Kember (2007) found that drop out rates are high in Asian open universities than in conventional universities. In this study, Mr. Y found that dropout rates in his courses were not as serious. Learners discovered strategies on how to survive in the OUHK over time. As a tutor, the author found that once a learner engages in the learning, he/she seldom quits.

However, OUHK course survival and student enrolment are obviously market led. Mr. X mentioned that student enrolments in business classes/subjects usually outnumbered other course learners. As OUHK courses are self-financed, the programme eventually disintegrated when the enrolment for E814 course dropped, and there was no interest shown in the market. Unfortunately, the OUHK found difficulty chasing after the market because of the lengthy, rigid, and complex bureaucratic processes involved in accrediting a new course and preparing the hardware (written course materials). *'As a self-sustaining entity, the OUHK is slow in responding to the emerging education market'*, Mr. Y explained.

The OUHK's distance and open learning mode could increase and widen the participation in lifelong learning, particularly in higher education, for human investment. Indeed, the difficulty of being self-reliant in one's own studies and the impression that OUHK's qualification is "second class" might lessen the contributions of open and distance learning in lifelong learning.

6.1.11 In what ways should the Hong Kong government influence the development of lifelong learning policy?

The vision of the education reform (EC 2000a) has the following aims: a) build a lifelong society, b) raise the overall quality of students, c) construct a diverse school system, d) create an inspiring learning environment, e) acknowledge the importance of moral education, and f) develop an education system that is rich in tradition but is cosmopolitan and culturally sensitive.

According to the EC (2000a), the central focus of the whole educational reform is the 'building of an education system conducive to lifelong learning and all-round development'. The educational reform suggests the use of principles that i) are student-focused, ii) have win-win results and ensure quality; iii), cater to lifelong learning, and iv) include society-wide mobilisation.

How well were the respondents aware of the new changes and how did they respond to the initiatives of the government in developing lifelong learning? In the short term, the informants assumed that in response to changes, the government should take the leading role in supporting lifelong learning. In the study, Subjects B and E asked for more learning opportunities and information about formal studies. Most of the respondents hoped the government would take a major role in providing facilities, concrete social and labour policies about lifelong learning in terms of incentives (advantages), and financial and family support, all of which are materialistic and logistical support. Therefore, the government should do more about “ii) having a win-win result and d) creating an inspiring learning environment.”

With regard to higher education, the respondents, particularly the nurses, seemed to be satisfied with the second chance of learning through the open and distance learning mode. The EC (2000a) calls for a diversified, multi-channel, flexible, and interlinked system with an increase in post-secondary learning opportunities. This was the suggestions of EC with regard to “c) constructing a diverse school system” and “iii) catering to lifelong learning.” Jegede (2001) suggested that this is a major departure from the focus previously given to the traditional classroom-bound type of education. In effect, it advocates that the open and distance mode should move to the mainstream.

Such being the case, the government should expand the industries of open and distance learning.

Ultimately, the respondents asked for radical and cultural changes in lifelong learning by suggesting a new learning culture and attitudes about lifelong learning. E814 learners in particular thought the provision of courses such as E814 was helpful in widening their horizons in lifelong learning. This deals with “a) building a lifelong society” and “iv) including society-wide mobilisation.”

The respondents thought that learners should not be too dependent on teachers. Learning for examination (i.e., the syllabus or task-oriented approach) is common in schools in Hong Kong, but it is a barrier to lifelong learning development. This kind of practice obstructs the critical thinking and creativity of the students as well as their all-around learning experience. The introduction of the notion of lifelong learning to students should be made as early as the formal education (i.e., schooling) stage to allow the seed of lifelong learning to grow and thrive. In addition to the current instrumental approach, the government should integrate the humanistic approach in promoting lifelong learning. Although the respondents were studying for qualifications, they believed that receiving a certificate would not actually reflect

performance and ability.

Evidently, in promoting lifelong learning, the EC seemed to adopt a two-pronged approach to reform the existing education system – the initial (i.e., school education) and the post-basic education (i.e., adult learning) – to learners of all ages and all kinds.

The educational reform of lifelong learning had been doing well apparently. The direction of the two-pronged approach of reforms was comprehensive. However, this study believed that the Education Manpower Bureau and the Education Reforms were more likely to manage the initial and basic education better than the post-basic education (i.e., adult and continuous education).

The respondents lacked lifelong learning values, attitudes, knowledge, and skills, and they were far from the idealised lifelong learners. Nonetheless, Smith and Spurling (1999) advocated the holistic notion of lifelong learning and education, urging for the all-round development of learners despite the tendency of the adult learners in this study to not welcome the prospect of altering the lifelong learning culture. They had clear boundaries of learning and extrinsic/external learning motivations. According to Smith and Spurling (1999), such learners are mere updaters and instrumental learners rather than real lifelong learners.

Knapper and Cropley (1991) depicted an ideal lifelong learner as one who a) is strongly aware of the relationship between learning and real life, b) is aware of the need for lifelong learning, c) is highly motivated to carry on lifelong learning, d) possesses a self-concept favourable to lifelong learning, and e) possesses the skills necessary for lifelong learning. This study revealed a collection of phenomena showing that the respondents were short-sighted about lifelong learning and were simply using learning as a value-added tool/strategy to fulfil their short-term goals and immediate needs for survival, power, and competition (b,c,d). They lacked the (a) vision to connect lifelong learning to real-life curriculum (learning process) and (b) lifelong learning skills, such as meta-learning, critical thinking, and reflection.

Smith and Spurling (1999) argued that lifelong learners are linked to their own learning culture between the surrounding cultural influxes. The government should foster a life learning culture for two reasons. Therefore, everyone should have the necessary attitudes and skills to be a real lifelong learner. Longworth (1999) argued that lifelong learning values and attitudes are as important as lifelong learning skills and knowledge.

According to the EC (2000a), Hong Kong will develop into a society that values lifelong learning. Everyone will have the attitude and ability for lifelong learning, and the willingness to advance further beyond their existing knowledge level and to consolidate and upgrade their knowledge and ability continuously. This implies that people should have the attitude of lifelong learning of being ready and able to learn by all means regardless of the implications. Kennedy (2002) argued that *learning to be* is as important as *learning to do*. Effective adult learning, particularly the self-directed kind, is closely linked to the readiness of an adult to learn, which, in turn, seems to be linked to his/her (changing) role as worker, family member, and so on.

Hong Kong lifelong learners should possess lifelong learning skills. The EC (2000a) proposed in the educational reform that it should enable every person to attain all-round development in the domains of ethics, intellect, physical, social skills, and aesthetics according to his/her own attributes so that he/she is capable of lifelong learning; critical and exploratory thinking; innovation and adapting to change; filled with self-confidence and team spirit; willing to put forward continuing effort for the prosperity, progress, freedom, and democracy of their society; and capable of contributing to the future well-being of the nation and the world at large. According to Smith and Spurling (1999), essential and advanced lifelong learning skills must be



adopted by every lifelong learner, such as the ability to communicate and calculate above the basic level; self-awareness and self-development skills; ability to understand the values of lifelong learning and the courage to apply them; realisation (as far as it can be determined according to age) of unfolding personal profile of aptitudes and intelligences; ability to apply learning usefully to creative or socially responsible ends; basic knowledge of planning a learning career and basic awareness of systems for learning and guidance; labour market and career awareness; and advanced critical thinking.

To develop lifelong learning in Hong Kong, the government should start increasing the provision of formal studies through diverse systems, such as open and distance learning, offer logistic support in terms of money and family care, and prepare and equip real life learners through a new lifelong learning culture.

## 6.2 Conclusion About the Research Problem

In the previous section, the subsidiary questions were considered. The overall research problem will now be addressed.

This study is about the views and practices of OUHK lifelong learners. Smith (2002)

stated that recently there has been growing attention to the idea of lifelong learning. Kumar (2004) observed that there is no single definition that captures lifelong learning shared by everyone. Lifelong learning is interpreted by various stakeholders in many different ways. In the OUHK, the author met people who called themselves lifelong learners and observed that these people worked hard to continue their studies to pursue qualifications, keep upgrading, and maintain their competitiveness. The respondents were willing to sacrifice their time for leisure, family, and money to equip themselves through formal studies to climb up the social and career ladder. Qualifications were simply an incentive for learning.

The lifelong learning of an individual should be context dependent and intrinsically unique. To a certain extent, the lifelong learning journeys of the respondents reflected their continuous, dynamic, and interactive learning with their life scenario. However, the reviewed lifelong learning of the respondents reflected a few or even no significant difference in this study. The lifelong learning exposures of their learning were all alike, going through the same lifelong learning pathway.

a) The context and nature of lifelong learning

The context and nature of lifelong learning among respondents were about the

fulfilment of their i) needs for survival – living and earning; ii) sense of security – risk and threats arising from the competitive environment; and iii) mental functioning – maintaining a sound and smart mind through information/knowledge acquisition and academic thinking. The intentions of the respondents to pursue lifelong learning were extrinsically motivated and externally driven by the government’s general education policy (affecting most of the teachers in this course) and adult education policy/provision (affecting the participation/access to formal education). Their learning was mainly economic/job security related.

Those who were able to react to immediate and short-term individual/professional/social needs and changes can be referred to as responsive lifelong learners. Smith and Spurling (1999) called them updaters. The motivation of updaters is primarily economic. Updaters are further divided into two groups: crisis learners and pre-emptors. *Crisis learners* are those who react to a life crisis. They may have lost their financial means and may need to address their employability urgently. *Pre-emptors* are those who have more time and who try to avoid crises. Hence, in this study, by definition, the respondents can be called pre-emptors. Meanwhile, Subject F is a *returnee*. Smith and Spurling (1999) define returnees as those who want to re-enter learning after a long “timeout” during which their skills and confidence may

have waned.

In this study, some respondents (Subjects B, C, and D) tended to demonstrate a proactive (i.e., long- to medium-term needs) approach in initiating lifelong learning in accordance to their personal needs and improvement. According to Smith and Spurling (1999), they are called *self-developers*. Self-developers see learning in terms of consumption or as an end in itself rather than in highly instrumental terms. Self-developers include people wanting to upgrade their working skills to improve the quality of their work experience and people wanting to learn apart from the working context as a rewarding activity itself or for domestic or social purposes. Some of these learners would like to learn on their own, while others would want to take part in a group, usually with people with same interests.

#### b) Contents and strategies of lifelong learning

In terms of contents and strategies of lifelong learning, respondents had a clear lifelong learning curriculum consisting of formal learning (i.e., overt structured preset curriculum) and informal learning (i.e., real- life curriculum).

In the fast food learning culture, regardless of the career, age, and gender differences of the respondents, their experiences, motives, and strategies indicated that they were ready and prepared to engage in lifelong learning in formal studies rather than in informal learning. The OUHK operating in an open and distance learning mode was one of their choices. They were pursuing learning for academic (higher degrees) and professional qualifications, and for academic and career progression and development. Thus, they were adding value to their curriculum vitae.

The respondents showed a limited mindset in lifelong learning by focusing on formal studies as their lifelong learning experience, which is the preset lifelong learning curriculum. To them, lifelong learning could be a kind of protracted and structured learning in adult life acquired through examinations. According to Tight (1996), traditional adult learners draw a clear line between education and training. The nature of education may seem relatively clear to us, with particular associations with educational institutions such as schools, colleges, and universities. In addition, the respondents were concerned with lifelong education more than lifelong learning. Lifelong long education is different from lifelong learning. According to Maslin-Prothero (1997), lifelong long education is concerned with more formal approaches to learning and includes schools, colleges, universities, and those

organisations responsible for vocational training, while lifelong learning develops through primary and secondary socialisation. The people who can encourage the cultivation of our lifelong learning skills are our primary caregivers, family, friends, and ourselves.

Their commitment to lifelong learning was important. According to the respondents, they maintained their learning (i.e., formal studies) chiefly through interest and family and peer support. In the context of institutional (i.e., formal) learning, they could opt for an instrumental, passive, and surface learning approach to formal learning in lifelong learning to ensure success

In the study, the respondents apparently overthrew the balance of learning towards career and professional needs and the formal learning experience, while neglecting the importance of personal needs and informal and non-formal learning. The neglect of informal learning was done through covert real-life situations in lifelong learning. For the respondents themselves, what they all had was another “real-life lifelong curriculum,” which is unplanned, unstructured, and learned through non-formal and informal ways including daily living, work experience, knowledge, decision making, and problem solving. In lifewide learning, the respondents employed the deep

learning strategies in their non-formal and informal learning. According to Tuijnman (2002a), researchers considered lifelong learning not only as organised activities but also as non-formal, self-directed, and experiential forms of adult learning. People learn not only through formal ways but also through non-formal and informal ways. *'Non-formal refers to sites of organised learning opportunities outside institutions, and informal context where learning is not planned'* (OUHK 2004, E814 Study Guide, Section 1, p.1). Learning in the real life curriculum stresses the process and quality of learning.

#### c) Framework for lifelong learning development

Clearly, the EC laid out the framework of lifelong learning development through the educational reform as discussed previously. However, the respondents did follow market-led learning and created a boundary in learning between personal needs and social needs and among formal, non-formal, and informal learning. The outcomes of this study indicate that the respondents were far from real lifelong learners. To both the government and the people of Hong Kong, lifelong learning should be direct toward a more visionary, futuristic, and individual-oriented learning in life, with a seamless boundary and a flexible structure and organisation in learning and education. The application of the lifelong learning should suit different changes and needs at the

individual, national, and international levels. According to Paye (1995), continuing to expand education and training systems that rely upon learning opportunities limited to early life will not suffice as a strategy for meeting the challenges of today. There is growing support for a strategy based on a flexible framework of lifelong learning, extending from pre-schooling through all stages of education at primary, secondary, and higher levels, to continuing vocational training in educational and labour-market institutions, informal learning on the job, and self-directed and cooperative learning at large in society.



## Chapter Seven: Implications and Recommendations

### Introduction

Based on the conclusions presented in Chapter Six, this chapter discusses the implications of the study and forwards the recommendations. This chapter also presents the limitations of the study and identifies possible areas for future study.

### 7.1 Implications

From the conclusions, the following implications are derived:

1. Lifelong learning in Hong Kong is a practice rather than an ideal, slogan, or ideology.
2. The respondents were consumers of lifelong learning.
3. Lifelong learning serves short-term goals.
4. The respondents were externally motivated to engage in lifelong learning.
5. Lifelong learning is not only economically driven. It is also dominated by information and knowledge.
6. There are limited overlaps between formal and non-formal/informal learning, education and knowledge, and personal and work lives.
7. The long-term provision of lifelong learning opportunities is a concern.
8. The critical and reflective thinking abilities of lifelong learners are weak.

9. The respondents did not favour self-directed learning.
10. There is a need to promote lifelong learning skills and strategies.
11. The OUHK has limited roles in lifelong learning.
12. The government should take an active role in lifelong learning.

#### 7.1.1 Ideology and practice of lifelong learning

Whether Hong Kong's citizens take lifelong learning as an ideology or practice is difficult to say (Young 2000).

Lifelong learning was taken for granted by the respondents. Accordingly, lifelong learning is a continuous learning process across one's lifetime. The respondents were very familiar with the literal meaning of lifelong learning. Philosophically, they had a broad sense of lifelong learning. They described lifelong learning as that from the cradle to the grave" and "lifewide" learning in terms of time (i.e., anytime) and place (i.e., formally, non-formally, and informally). In practice, OUHK learners (i.e., undergraduates and post graduates), tutors, and course coordinators, regardless of age and gender, actively participate in lifelong learning.

The study found no significant differences in the lifelong learning practices of those studying NU305 and those enrolled in E814. They took lifelong learning as a learning hierarchy, a footstep to follow and a target to achieve, reflecting the structure of formal studies (i.e., primary, secondary, tertiary, and professional education). Generally, most of the respondents were not critical about of the government's lifelong learning policy; rather, they were compliant with the market-led learning environment. This study suggests that lifelong learning in Hong Kong is a slogan and a practice rather than an ideal or an ideology.

#### 7.1.2 Attitudes, knowledge, and skills relevant to lifelong learning

E814 respondents were critical about the ideology behind their own lifelong learning practices than their NU305 counterparts, suggesting that NU305 respondents lacked the attitudes, knowledge, and skills relevant to lifelong learning. Therefore, focusing on the respondents' attitudes, understanding of knowledge, and skills is helpful.

##### a) Attitudes

The respondents took lifelong learning as intentional, organised, and autonomous activities based on individual choices and calculation of benefits. Accordingly, lifelong learning is both an investment and consumption. Indeed, with the exercise of

choice on the part of most adults and the market nature of adult education provision, adult education and training can be regarded as a form of consumption (Field 1996). Therefore, the respondents were consumers of lifelong learning.

The respondents took lifelong learning as a strategy in life for survival, competition, promotion, and moving up the social ladder. Evidently, they took the human capital perspective of lifelong learning. Their lifelong learning was externally motivated in terms of extrinsic drives, such as instrumental motivation (i.e., rewards) and external self concept-based motivation (i.e., matching behaviour with externally-developed ideal self) (Leonard et al 1995). To keep themselves competitive and updated, the respondents (i.e., lifelong learners) chose to further their studies through HE and CE. The educational system is therefore seen as an instrument (Kennedy 2002a). The government has turned to CE to seek solutions to the supply side problem at the post secondary level. Lifelong learning therefore serves short-term goals. In addition, Chinese students are driven by extrinsic achievements (e.g., qualifications, social status, and salary) more than by the intrinsic motivation to learn (Cheng 1994).

The respondents were less reflexive and critical about their economically driven lifelong learning practices. They were compliant and susceptible to being affected by

government policies. Indeed, lifelong learning is dominated by economic aspirations and official interpretations of lifelong learning (Smith and Spurling 2000). While the study was conducted in the wake of the 1997 economic downturn, it suggests that lifelong learning serves the government by providing a means to solve economic and social problems. Developed countries have generally moved towards mass higher education in order to nurture a well-educated workforce capable of facilitating the move towards a knowledge-based economy (Kember 2007). The respondents were externally motivated to engage in lifelong learning.

To be knowledgeable and to keep abreast with this competitive world, the respondents found that “knowledge is fortune” and “knowledge is power.” In response to the impending changes and needs, a “fast and more” culture of learning was evident among the respondents. The fast food learning culture reflects that people are hungry for short-lived knowledge. We must consider that world knowledge doubles every four years, and soon it will be every three years (Kami 1994). Thus, every worker’s knowledge automatically becomes obsolete within a very short time unless he/she makes a serious effort to remain knowledgeable. This implies that lifelong learning is not only economically driven but is also dominated by information and knowledge.

This reminds us that the respondents' attitude towards lifelong learning is learning FOR life rather than learning OF life. In this study, it is clear that lifelong learning is economically driven. Moreover, the ideology behind lifelong learning, which is humanistic through life and life based, was absent in the study. Supposedly, "learning to be" is as important as "learning to do" (Kennedy 2002c). Effective adult learning, particularly self-directed learning, is closely linked to an adult's readiness to learn, which, in turn, seems to be linked to his/her (changing) role as a worker and family member, among others. In addition, the distinction between the idea on lifelong learning of the UNESCO and that of the OECD is that the former's idea has its roots in the humanistic tradition (Aspin and Chapman 2000). Instead of seeing education as instrumental to the achievement of an extrinsic goal, education may also be perceived as an intrinsically valuable activity, something that is good in and by itself. Learning through(out) life leaves open the question of whether learning is also "through" life in the sense that it is "based on life experiences." "Education" has indeed become vacuous (Field and Leicester 2001).

#### b) Knowledge

By following the hierarchy of learning and by pursuing formal studies, the respondents chased information rather than learn through life. They also failed to

mention about learning in the family, at the workplace, and in the community, which, to a great extent, is part of lifelong learning. Therefore, the respondents lacked knowledge on lifelong learning. On their own, they created barriers to lifelong learning.

The EC (1999b) announced that the age of lifelong learning has dawned. Learning is no longer the prerogative of those aged 6-22. There is a continuous and strong relationship between learning and real life at any age (Knapper and Cropley 1991; Smith and Spurling 1999, 2001). Further, learning is taken to be the process of acquiring knowledge or skills, which significantly adds to the learner's understanding or experience of life. Furthermore, learning has the widest possible boundaries. It includes all the main types and classes of learning, such as formal and informal learning.

To the respondents, knowledge acquisition was differentiated by the time, space, structure, product, and process of learning. In light of the different life stages and time frames and in response to the ever changing internal and external environments, lifelong learning is composed of the curricula of (i) STUDY (i.e., formal learning and the outcomes of learning in terms of quantity and qualifications), (ii) WORK (i.e.,

process of learning, which involves experience and quality in terms of competence, ability, and performance), and (iii) PERSONAL/LEISURE through life. This study indicates that there are limited overlaps between formal and non-formal/informal learning, education and knowledge, and personal life and work lives.

The respondents were not flexible lifelong learners because they did not appreciate the lifelong and lifewide dimensions of lifelong learning in the first place. Lifelong learning has not only lifelong but lifewide dimensions (Faure et al 1972). The respondents were not aware that lifelong learning is intended, on-going, and wide enough to acquire and integrate knowledge through life. Therefore, they disregarded personal and leisure activities and non-formal and informal learning as learning. They failed to seek opportunities to acquire and integrate knowledge through life. The concept of lifelong learning as purposeful learning, whether it is formal, non-formal, or informal, is found in the day-to-day learning that all people are engaged in throughout their lives (ILO 2000).

The respondents also misconceived formal and informal learning. They apparently judged themselves as lifelong learners by their involvement and engagement in formal, organised, structured, and explicit learning activities. It is probably because



traditionally, we emphasise teaching rather than learning. Consequently, the centre of lifelong learning is based on formal studies. Knowledge, to a certain extent, is transmitted, and teaching is considered to be more important than learning. In the end, knowledge becomes a marketed commodity. The respondents focused their lifelong learning experiences on formal learning, which is based on a formal curriculum—the product of learning. The current lifelong learning system is the extension of the current school educational system, which pays attention to the product of learning (i.e., formal education). The first degree is the foundation of lifelong learning (Mok 2002; EC 1999b). As a consequence, in a knowledge-based economy and with a fast food learning culture, the respondents chose institutes that offered formal studies.

The respondents showed a narrow mindset about lifelong learning by focusing solely on formal studies. They ignored the importance of the seamless boundaries between formal and informal learning. This raises concerns over the long-term provision of lifelong learning opportunities. The shift from lifelong education to lifelong learning is highly significant (Ng and Young 2000). It reduces the emphasis on the role of structures and institutions, and puts the individual at the centre instead. This shift in perspective has many implications for educational policy and practice: individual competence and skills are what counts, not educational qualifications per se.

### c) Skills

The respondents did not seem to have lifelong learning skills. Their critical and reflective thinking was weak. Critical thinking is an essential element in lifelong learning, and critical thinking is a key lifelong learning skill, which must be developed in all parts of the learning scene (Smith and Spurling 1999). According to the respondents, the society does not prepare or encourage them to use critical thinking. They found critical thinking to be rhetorical, something just for talking and not for doing. In Hong Kong, people are taught to live with the social norms, to meet someone else's expectations, and to not be critical.

Hong Kong learners tend to find the process of critical analysis difficult (Venter 2002).

They also find it difficult to form their own conclusions from the materials presented to them. The respondents attributed their lack of critical thinking ability to the teacher-centred pedagogy. We are used to being spoon fed by teachers (Fong 2006).

All we read are the piles of notes and textbooks they provide us. We never challenge or question. We seldom search for materials spontaneously or explore knowledge beyond our curriculum. Hong Kong students prefer passive learning and resist teaching innovation, which has little or no foundation (Kember 2000). There is a need to develop the skills of lifelong learners.

Most of the lifelong learners in this study were supposed to know “how to learn” because they had at least completed secondary education and professional education (they were nurses, teachers, and engineers). However, self-directed learning, which is as important as critical thinking, was missing in the respondents. In lifelong learning, the emphasis is placed on the role of individual adults in taking charge of their learning, with the promise of eventual “self-fulfilment” (Tight 1998). Moreover, learner autonomy is about the redistribution of power; self-directed learning aims to shift the power base away from educational organisations (i.e., teachers, curriculum, etc.) and towards the adult learners themselves (McNair 1996). This study showed that the respondents did not favour self-directed learning. They did not choose the OUHK for its emphasis on self-directed learning but for its distance and open learning mode. Seemingly, in the course of the study, the respondents recognised their learning difficulties in self discipline, learning styles, and time management. To a large extent, this implies that lifelong learners need lifelong learning skills.

The respondents indicated that from early adulthood to middle age, they still opted to use superficial and instrumental learning approaches in their formal studies. In the context of institutional (formal) learning, they chose a passive and surface learning approach to guarantee success. In general, the respondents blamed the teacher-centred

pedagogy and argued that qualifications alone are not adequate and that they mean nothing. They thought that ability and experience are more important and realised that work-based learning is a kind of informal learning. Learning is the process of acquiring knowledge or skills, which adds significantly to the learner's understanding or experience of life (Smith and Spurling 2001).

The respondents had difficulty in exploring and explaining how they were learning in real life. They used the deep learning approach and transformative learning in their day-to-day working environment, where the real battle for job enrichment is. Therefore, they were able to use different lifelong learning strategies under different circumstances. Different approaches are taken by older and younger students. Older students are inclined to use a deep approach and are intrinsically motivated (Kember 2007). Transformative learning arises from individuals who have a framework of reference for interpreting their experiences based on what happens to them and on what they hear and read (Williams 2001). The question is about promoting learning, which facilitates a better understanding of lifelong learning. Learning involves the reorganisation of experiences, but how an adult embarks on this new learning—wholeheartedly, half-heartedly, cynically, anxiously, or reluctantly—is a major factor in determining whether learning will be successful or not (Merriam and

Caffarella 1999).

### 7.1.3 The role of the OUHK

This section also addresses the role of the OUHK in lifelong learning. The OUHK, as the only tertiary institution in Hong Kong using open, distance, and flexible learning, apparently plays a significant and recognised role in Hong Kong's market-led post-initial education and training programme. The respondents felt that the OUHK contributed to lifelong learning because of its flexible programmes, multiple entry and multiple exit policies, and wider implementation of the credit-unit system that increases and widens participation in lifelong learning. the Open University of UK is a great success, and it follows Fordism in knowledge production (i.e., mass production for a mass market) (Jarvis 1997).

While the OUHK courses are self-financed and expensive, some people are still excluded from formal learning. Some learners believe that the OUHK's expensive course fees are not worthwhile if they only obtain second-class qualification in return.

Lifelong learning advocates holistic and transformative learning, but the OUHK fails to do so because of the limited face-to-face interaction among teachers, students, and peers. Studying in the OUHK needs self-direction and self discipline; not many

learners have these abilities. In addition, Chinese learners may not fit easily with Western approaches to distance education (Robinson 1998). Distance education comes from a tradition of individualism based on Western educational philosophy and psychology. Chinese culture is oriented towards the community (i.e., the collective) rather than towards the individual and towards self development.

#### 7.1.4 Roles of the government

The Education Reform (EC 2000a) has the following aims: (a) to build a lifelong society, (b) to raise the overall quality of students, (c) to construct a diverse school system, (d) to create an inspiring learning environment, (e) to acknowledge the importance of moral education, and (f) to develop an educational system that is rich in tradition but is cosmopolitan and culturally sensitive.

At the time of the study, five years after the educational reforms were initiated, most of the respondents, particularly the nurses, seemed to be satisfied with the second chance of learning through the open and distance mode. Therefore, the provision of an alternate access to learning other than the traditional modes was a correct strategy, and the government should do more to construct a diverse school system (c).

The informants assumed that in response to changes, the government should take a leading role in supporting lifelong learning. The government should work harder on (a), (b), (d), (e), and (f). Moreover, the respondents asked for more materialistic and logistical support. They hoped that the government would provide lifelong learning facilities and concrete social and labour policies in terms of incentives (i.e., advantages), financial assistance, and family support. Therefore, the initiation of lifelong learning is dependent on government policies. The government, rather than its citizens, should play an active role in promoting lifelong learning.

## 7.2 Recommendations of the study: Development of lifelong learning

This study recommends the promotion of a “momentum of learning” by cultivating lifelong learning attitudes and abilities. Under this momentum, people can adopt a learning approach from available sources to develop their interests and identities. The following recommendations are advanced for lifelong learners and government policymakers.

### a) Lifelong learners/OUHK learners

First, lifelong learners should act as active lifelong learning agents. They should no longer consider knowledge transmission as the only mode of learning. They should

not rely on teacher-centred pedagogy and on learning for examination (i.e., the syllabus or task-oriented approach) in their learning and studies. Lifelong learning is an active process in which students search for knowledge, understand it, and apply it to meet their personal and professional goals throughout life (Aggarwai and Bates 2000; Hanson and DeMuth 1992).

Second, in “learning to know” and in “learning to do,” lifelong learners should not discriminate between lifelong learning and education and training. The discursive shift towards lifelong learning must move the attention away from the differentiation of learners according to age and life stage, emphasising instead the continuities of “learning” (Field and Leicester 2000). Learners should aim at a holistic development by both learning and studying. They should integrate their formal, non-formal, and informal learning experiences. Different learning strategies (i.e., know-how and know-that) must be appreciated. There are two different processes of learning: knowing in action (i.e., intuitive or tacit knowing without consciously thinking about it) and knowledge in action (i.e., the process of reflecting upon intuitive knowing) (Schon 1987). Experiential learning underscores four stages of learning: (a) concrete experience (feeling), (b) reflective observation (watching), (c) the formation of abstract concepts (thinking), and (d) active experimentation to test hypotheses (doing)



(Kolb 1984).

Lifelong learners should also adopt flexible learning styles, not just the spoon-fed approach, in dealing with different kinds of learning at different life stages. A learning approach must not be confused with the context-independent learning style, and fortunately, Hong Kong Chinese are capable of deploying different learning styles in other contexts (Tang and Biggs 1996). Provided that enough time is given, adult Hong Kong Chinese learners should adjust to new learning styles (Kennedy 2002a). Further, a knowledge-based, market-driven economy requires its workers to be well equipped in information technology skills, engineering skills, marketing skills, negotiating skills, presentation skills, and other professional skills (Ho et al 2005). It also requires communication skills, emotion management, time management, reflective skills, interpersonal skills, organisational skills, general skills to learn and to adapt, and sheer stamina, which is gaining importance by the day. In addition, the new economy requires the capacity to persevere and to fight against all odds relentlessly.

Third, lifelong learners should understand the implications of “learning to be” and focus the goals of lifelong learning not only on social, extrinsic motives but also on personal and intrinsic needs. They should not only be economically driven

instrumental learners but real lifelong and perpetual learners as well. Individuals should constantly seek to learn and exhibit (a) individual commitments to learn for personal reasons and (b) social commitments towards mutual learning in the wider social context, including the world of work (Smith and Spurling 2001).

Fourth, lifelong learners should equip themselves and become competent with skills of “learning to learn.” They should grasp the opportunities to learn these skills during their initial and continuous education. The adult is a mature and independent person, capable of self-direction; his/her life experiences are vast, varied, and contributing richly to the learning process; and he/she is ready to learn (Knowles 1978). The skills of critical and reflective thinking, as well as of self-directed learning, are of immediate importance. With the rapid technological, cultural, and economic changes, reflection and critical thinking help in the development of professional skills (Williams 2001). Lifelong learners should be able to demonstrate different approaches in learning.

#### b) Government

The government should enhance current lifelong learning practices as a continuous learning process across life in terms of time frames or stages/ages, places (i.e., where),

and processes (i.e., what) through formal, non-formal, and informal ways. It should provide a fluid and flexible system that allows people, on the basis of equity, to learn for different purposes and needs through transferable, transformative, and self-reflective learning. Regarding the current instrumental approach to lifelong learning, the government should promote the holistic and humanistic approach in fostering lifelong learning. Education has been applied in helping solve urgent economic problems, and thus the Oxbridge self-development or liberal arts model is a luxury that Hong Kong cannot afford (Yang 2002).

i) Short- and long-term measures

Evidently, to promote lifelong learning, the Education Reform suggested a two-pronged approach to reform the existing educational system: initial (i.e., school education) and post basic education (i.e., adult learning) to learners of all ages and all kinds. The introduction of the notion of lifelong learning to students should be made as early as during formal education (i.e., schooling), allowing the seeds of lifelong learning to grow and thrive. We should try to provide a suitable environment to facilitate in-depth learning throughout life. The CNAAC (1992) outlines the conditions to support an in-depth approach to learning: motivational context, active learning, interaction with others, and a well-structured knowledge base, among others.

Regarding the weaknesses in critical and reflective thinking, the government should encourage students to spend more time reading (Man 2008). Reading provides more information and more perspectives; thus, it can indirectly help in thinking. The government should also adopt critical thinking courses in primary and secondary education and enforce active learning to create a harmonious learning atmosphere among students. Reflective logs and journals, portfolios of learning, and integration of different forms of learning have become common features of post-school education and training (Edwards 1998).

Without a catalyst, it is unlikely that individuals will recognise or take advantage of their learning to learn processes (Sandelands 1998). In the initiation of lifelong learning, the respondents in this study apparently depended on the government. To develop lifelong learning in Hong Kong, the government should increase the provision of formal studies through diverse systems, such as open and distance learning. The government should provide and increase logistic support (e.g., money, family care, and study leaves) to those who intend to take formal studies. The equity issue in formal learning should also be addressed; both males and females and third age and fourth age individuals, aside from mature and middle-aged adults, must also be included in lifelong learning (Aspin and Chapman 2000). It is important for the

government to provide incentives (i.e., tax reduction) for individuals, employers, and social partners who invest in lifelong learning and who ensure that lifelong learning does not reinforce existing patterns of privileges that widen the existing gap between the advantaged and the disadvantaged.

In this market-led and economically driven educational system, the government should monitor three things. First, it should monitor the conditions under which markets for learning can lead to responsive and efficient provision (Griffin 1999). Second, in the marketplace of learning, there are those who will be excluded. Thus, we need to encourage national policies that will widen access and make the benefits of the learning society available to a greater number of people (Jarvis 2002). The government should maintain a quasi-market (i.e., through backdoor government funding and sponsorship) instead of a full-market approach to avoid producing inequalities (Smith and Spurling 1999). Third, generic marketing is marketing the idea of lifelong learning (Smith and Spurling 1999). It is distinct from the marketing of particular schemes or marketing undertaken by providers for their own purposes and market shares. Therefore, resources and the focus of learning must be shifted away from formal and market-oriented learning. The government should thus promote policies that sustain both the short-term and long-term needs of individual lifelong

learners.

To encourage seamless boundaries and flexibility between learning and education, we should make full use of and strengthen our current accreditation system. To encourage continuous professional development, the government should get employers involved to support workplace learning. The need for flexibility means that it is essential for learners to secure credit for prior learning to avoid waste and de-motivation (Smith and Spurling 1999). Nationally accredited qualifications credit accumulation and transfer (CAT) arrangements must be made available.

The EMB (2008) launched the Qualifications Framework (QF) on 5 May 2008. The major purpose of setting up a recognition of prior learning mechanism under the QF is to enable employees of various backgrounds to receive formal recognition of the knowledge, skills, and experiences that they have already acquired. However, since its inception, employees from all sectors have not yet realised its benefits. There has been a growing international recognition that valuable learning occurs in many different places and at many different times (Haddow and McDonagh 1996). The principle of CAT is now being widely adopted in many parts of the world. Therefore, the government should help employees seek recognition for prior learning through

accreditation of prior learning (APL) and accreditation of prior experiential learning.

The EC (2000a) calls for a diversified, multi-channel, flexible, and interlinked system with an increase in post-secondary learning opportunities. This is a major departure from the focus previously given to traditional classroom-bound type of education (Jegade 2001). In effect, it is advocating the open and distance mode to move to the mainstream. According to the EC's (2000b) 10-year plan, community colleges should operate on the principles of lenient entry and stringent exit, a flexible mode of learning, a flexible course duration, diversified sources of subsidies, and an accreditation mechanism. Community colleges, not including other institutes, should also provide information and resources to the learners. It was a good idea to establish a CAT system to facilitate student mobility and to provide better articulation arrangements between community colleges and the university (University Grants Committee 1996). With these, the government should expand the open and distance learning industry.

ii) Long-term measures

In the long run, if the rhetoric of lifelong learning in Hong Kong is to become reality, it would have to gain acceptance from the Hong Kong society (Kennedy 2002b). In

promoting lifelong learning as a practice rather than as a slogan, education policies alone (e.g., the educational reforms) will not work. We need to have strategies to develop a culture of lifelong learning.

If the vision of a learning society is deemed paramount, this thesis suggests the need to push forward the concept of lifelong learning earlier in basic and continuous education. The government should view lifelong learning as a strategy and as a form of social capital. The role of the state with regard to many social and economic functions has become much more strategic and less oriented towards policy making (i.e., compulsion and regulation in every possible way) (Griffin 1999). Learning cannot be mandated or controlled; hence, the strategic role of the government is to create conditions under which as many people as possible will have opportunities to learn (Griffin 1999). We need an idea of an active and engaged citizenry in the society of learning that is not based on notions of economic prosperity and growth alone (Alheit 1999; Edwards et al 2002). As a pattern of participation in lifelong learning, the social capital theory emphasises the informal relations of trust, and it can be seen to provide a rationale for community-based policies that support social inclusion and cohesion. To make things happen, people often prefer to bypass the formal system and to talk to people that they know (Field 2003). Network memberships and a set of



shared values are at the heart of the concept of social capital. It seems that we need to build a learning society or a community where all sectors and peoples can participate.

### 7.3 Limitation and Implications for Future Study

Qualitative case studies were used in this study. This study is therefore descriptive rather than explanatory. Consequently, the design of the study limits the generalisability of the findings.

The research sample has some limitations. Lifelong learning views were restricted to participants who were studying in part-time distance learning programmes in the OUHK. Those who enrol in courses in educational institutions are truly the traditional focus of adult education research (Jarvis 1997). Views of the other OUHK learners studying distance and face-to-face programmes by part-time and full-time modes were not heard. Thus, the results may not be reflective of the practice of other lifelong learners using other modes of learning, such as full-time study and cyber learning.

Purposive and convenient sampling methods were used in this study. Only 25 samples from two out of the four schools of OUHK were engaged in individual or group interviews. The programmes/subjects of study were also confined to education

(master's degree) and nursing (bachelor's degree). Therefore, the views of other OUHK learners were not considered.

This study raises concerns over the provision (i.e., formal studies) of lifelong learning opportunities. Many possible exploratory studies are therefore suggested. For example, the OUHK's open and distance learning mode has a limited role in lifelong learning because learners favour the traditional and conventional learning mode. How can open and distance learning become more attractive to suit the needs of learners? If we need to expand the conventional mode of higher education, in which way could it be done (i.e., through community colleges or private and publicly funded universities)? Lifelong learners are consumers of lifelong learning, and logistics support must be given. As such, how should the learning market be shared and monitored? To foster lifelong learning, lifelong learning skills need to be cultivated. How can these skills be fostered in formal schooling where the learning environment focuses on short-term and extrinsic goals (i.e., initial and post-initial schooling)? Certainly, the bigger problem is how lifelong learning skills can be extended to non-participants of lifelong learning.

There were limited overlaps between formal and non-formal/informal learning,

education and knowledge, and personal and work lives. This study recommends a fuller scale of the CAT through credit transfer among institutes and the recognition of APL of individuals. Future studies must examine the difficulties surrounding this recommendation. What portion of time should lifelong learners spend in formal, non-formal, and informal learning in a day or in a year? How do they learn? How do non-participants view lifelong learning, and how can we encourage them to continue learning ?

Finally, a minor recommendation is that a large-scale evaluation of the Education Reform in relation to lifelong learning should be conducted by the government. Detailed cross-examination of the views on lifelong learning between and among Asian countries (e.g., Singapore, Taiwan, and South Korea) and Hong Kong may be carried out through comparative studies. The government should certainly take a strategic role and a social capital approach in building a learning society.

### Conclusions

This study demonstrated that the respondents who participated in lifelong learning were committed, self-disciplined individuals who were prepared and willing to overcome learning barriers, such as family, financial, and language problems. The

respondents were extrinsically motivated and goal-oriented. Moreover, their participation in lifelong learning was driven by economic and social gain and needs. They viewed lifelong learning as a strategy for living rather than as a practice.

Their stories on learning confirmed that there are boundaries of learning between formal and non-formal/informal learning, education and training, and personal and work lives, as well as a differentiation of learning based on age and life stages. In their formal learning, they were accustomed to instrumental or superficial learning strategies and to the examination or qualification-oriented approach.

The current approach of belief and provision towards lifelong learning is not anchored on the ideas of lifewide learning, personal development, and learner-centeredness.

Non-formal and informal learning exist but are not recognised or realised.

Nonetheless, non-formal/informal learning is learning through experiences, practical applications of knowledge, decision making, and problem solving through life. The society is not yet prepared for critical and reflective thinking, and self-directed and person-oriented learning, although these are deemed important in lifelong learning.

The distance and open learning mode, to a certain extent, facilitates the development

of lifelong learning, particularly CE. The OUHK, which focuses on flexible, open, and self-directed learning, provides quality and psychological rewards and assurance. It supports lifelong learners in the pursuit of lifelong learning for higher education and for professional and academic qualifications.

Distance learners and the government of the Hong Kong Special Administration Region are not yet prepared for lifelong learning. To them, the term lifelong learning is just an ideology and a slogan when it calls for humanistic, holistic, lifewide, and life-based learning. We are not yet prepared for lifelong learning; what we have is lifelong education and a fast food learning culture. In practice, lifelong learning simply means a strategy and an investment in human capital for Hong Kong's economic growth and competitiveness through a market-led education, training, and CE. The government needs to prepare the people of Hong Kong with the necessary abilities and attitudes by taking up a strategic role and by employing the social capital approach in cultivating a learning culture. Therefore, learning can then be achieved anytime, anywhere, and by any means.

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## Appendix A

### **Course E814 Supporting Lifelong Learning**

April 2004 Semester

Course fees: HK \$ 20,300

Level: Post graduate

Duration: Two semesters

Credits: 20

Registration value:10

Medium of instruction: English

#### Aims

1. to examine the emergence of lifelong learning as a key educational strategy and evaluate its relationship to traditional conceptions of adult or initial learning
2. to deploy a range of analytic practices in examining the literature relevant to lifelong learning
3. to critically evaluate developing practices within the teaching and learning, organizing and policy approaches to lifelong learning
4. to investigate the diversity of meanings of lifelong learning and examine the implications for change in a range of formal and informal learning environments

#### Contents

The course covers the following topics

1. Introduction to lifelong learning
2. Perspective on learning
3. Organising learning
4. Policy contexts and responses
5. Reflecting on 'supporting lifelong learning'

#### Learning support

There will be 12 two-hour tutorials and two three-hour day schools (which take place at weekends) and two 'surgeries' for individual consultation

#### Assessment

There will be five assignments, including a project and a final examination

#### Online support

This course is supported by the Online learning Environment (OLE) to communicate electronically with tutor and Course Coordinator as well as with other students. However, the use of OLE is Not compulsory for the study of the course

## Appendix B

### **Course NU305 Health Assessment and Primary Health Care**

NU305 Health Assessment and Primary Health Care is one of the core courses of the Bachelor of Nursing programme. The course is a two-semester, higher level, 10 credit courses. There is no prerequisite for this course.

NU305 Health Assessment and Primary Health Care is split into two major parts. The first describes the principles and practices of health assessment and the second discusses the concepts and issues of primary health care

#### Aim

1. to improve nurses' knowledge and skills in all aspects of health assessment
2. to enhance nurses' understanding of the philosophy, concepts and implementation of primary health care

#### Objectives

1. Recognise the significance of health assessment in nursing practice
2. Determine the best sequence for performing a health assessment
3. identify the philosophy, concepts and principles of primary health in nursing practice
4. Justify the role of nursing in implementing primary health care
5. identify appropriate strategies for evaluating primary health care activities

#### Learning support

There will be 10 two-hour tutorials and one 'surgery' for individual consultation

#### Assessment

There will be four assignments and a final examination







2. Course structure

Items	Strongly Agree (4)	Agree (3)	Disagree (2)	Strongly Disagree (1)
a. Course objectives are fulfilled				
b. Course guide is useful				
c. Readers are useful				
d. Supplementary material useful				
e. Tutorials are adequate				
f. Assignments are relevant to the course' objectives				
g. Tutor's support is adequate				

3. Which topic(s) do you find most useful?

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4. What extra topic(s) should be included?

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5. Which topic(s) should be deleted? Please state your reason(s).

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6. What are the strengths of this course?

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7. What are the weaknesses of this course?

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8. Any comment(s) and suggestion(s)?

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### **C) Reflection**

1. What is reflection?

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2. What is the relationship between reflection and learning?

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### **D) Critical thinking**

1. What do you mean by critical thinking?

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2. As an adult learner, do you think critical thinking is important and how ?

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3. As a practitioner, do you think critical thinking is important and how ?

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### **E) Lifelong learning**

1. To you, what do you mean by Lifelong learning?

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2. To develop the concept of Lifelong learning, what factors do you think are important?

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3. How Lifelong learning can be developed in Hong Kong?

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~ Thank You~

## Appendix E

### **Interview Guide on Lifelong Learning (course members)**

#### 1. General Information

- Name, gender, occupation, educational background
- Why did you enrol in this course? What are your expectations about this course?
- Why did you choose OUHK and distant learning for this course?
- Have you experienced any outstanding enjoyable or stimulating event while studying at the OUHK?
- What difficulties did you encounter while studying at the OUHK, if any?

#### 2. Lifelong Learning Experience

- When/where did you learn about the term lifelong learning?
- Is there any alternative term that you think is associated or related with lifelong learning?
- Do you think that there are differences between lifelong learning and adult education, further education, vocational training, continuous professional development, and so on?
- Do you observe any differences or discrepancies about your concept of lifelong learning before you attended this course and now? If so, then how do you feel about these discrepancies?
- Do you consider yourself a lifelong learner?
- What kind of activities do you participate in to learn?
- What are your reasons for participating or not participating in lifelong learning?
- How do you view your lifelong learning progress so far?
- Can you identify three significant lifelong learning issues in the past? Describe them in terms of what, when, where, how, and why the learning took place.
- Are there any particularly successful or unsuccessful episodes in your learning? What factors contributed to your most enjoyable learning experience?
- Do you get help and advice in lifelong learning issues? How do you do so?
- To your knowledge, how do people get information on lifelong learning? Do you think this public information is adequate?
- What are your strengths and weaknesses in managing lifelong learning?
- What forms of assistance do you get in your lifelong learning process?
- In your opinion, how could your lifelong learning be supported?
- What problems are you facing right now? Are there problems that you anticipate will happen in the future? If so, how do you solve and will solve these problems?

### 3. About the Course and Critical Thinking

- What do you like most about this course?
- What do you dislike most about this course?
- In your opinion, what topics should be added or deleted from this course?
- Do you find the number of tutorials adequate or lacking?
- How useful are the course materials?
- Do you think that the discussions in class are useful and important?
- How do you understand/view critical thinking?
- What have you learnt about critical thinking in this course?
- Do you think critical thinking is helpful to you? If so, in what ways?
- Does your tutor promote and encourage critical thinking?

### 4. About the Lifelong Learning Policy of Hong Kong

- Do you think we need a lifelong learning policy in HK? Why?
- Can you tell me what you know about the HK lifelong learning policy?
- How does the HK lifelong learning policy affect you?
- Has your working organisation been affected by the HK lifelong learning Policy? If so, how?
- In what ways does the HK government facilitate the development of the lifelong learning policy?
- In what ways does the HK government hinder the development of the lifelong learning policy?
- In your opinion, how strongly should the HK government support the HK people's lifelong learning?

## Appendix F

### **Interview Guide for the Course Coordinator**

Date:

Name: \_\_\_\_\_

Position: Assistant Professor

Length of service in OUHK: \_\_\_\_\_

Course coordinator (E814/NU305) since: \_\_\_\_\_

No. of batches of students: \_\_\_\_\_

Course coordinator of other course: \_\_\_\_\_

- What are your views on lifelong learning?
- Do you consider yourself a lifelong learner?
- What is the relationship between lifelong learning and distant learning in HK?
- What is the mode of learning in the OUHK: distant learning or open learning?
- What are the features of distant learning/open learning in the OUHK?
- What are the benefits of studying in the OUHK?
- What is the profile of OUHK learners? Do you observe any commonalities among them? Why did they choose to study at the OUHK?
- How do you feel about OUHK learners?
- Do you think OUHK students are lifelong learners? In what way(s)?
- What are the problems most OUHK learners commonly face when studying at the OUHK?
- What are the strengths and weaknesses of the OUHK?
- Are critical thinking and reflection essential to lifelong learning?

## Appendix G

### **Letter of Participation**

Dear Participant,

I am currently taking part in a Ph.D. program at the University of East Anglia. My thesis entitled “Learning through Life: A Study of Learners at the OUHK” focuses on the different notions about lifelong learning of OUHK learners. I plan to collect data through in-depth interviews, and thus I would like to ask for your participation. Each interview will last for about 60 minutes. I shall, with your permission, record the interview and will delete the recording as soon as the information has been analyzed. All information collected in the interviews will be strictly confidential. I guarantee your anonymity and assure you that no individual will be identified in any report of the study.

Thank you for taking the time to help me in completing this study.

Yours sincerely,

Tang Hing-wan, Stephen

Signature: \_\_\_\_\_

Date: \_\_\_\_\_