

LLinE is a trans-European journal dedicated to the advancement of adult education, lifelong learning, intercultural collaboration and best practice research.

CONTENTS

2	Orientation	
3	Editorial	Boundaries as learning potentials
4	INTIME ONTIME	And the winner is....
	POLICY	
5	Rimantas Dumčius and Donatas Pocius	Who pays for training? – Cost-sharing mechanisms in Europe
	RESEARCH	
11	Alexandra Damm and Carolin Knauber	Financing further education in Germany
17	Jasmina Mirčeva	Employee education amid austerity
23	Peter Mayo	Critical pedagogy in hard financial times
	PROJECT PICKS	
28	Pavle Tvaliashvili	Small grants projects –The formula to discover oneself
	INTERVIEW	
35		Pinching the euro
	ARTICLE SERIES: INDIGENOUS KNOWLEDGE	
39	Timote Vaioleti	Learning as spirituality and nurture – Pacific indigenous peoples' perspective of lifelong learning
	REVIEW	
48	Stephen Murgatroyd	A tour of a world in crisis
	SPEAKERS' CORNER	
50	Gleb Bogatskyi	This crisis will make us learn

FINANCING LIFELONG LEARNING

The question of financing cuts deep into the fundamentals of education on many levels. What type of education is to be funded at any given time – vocational or perhaps non-formal? Whose job is it to fund education – the state's, private actors', the beneficiaries' themselves? These questions have a powerful value-philosophical and political resonance. Another important level has to do with the practical side of financing in the form of, say, funding mechanisms, impact and policy.

This issue of LInE attempts to shed light on the different sides of the financing problematique. The European economic crisis cuts through all the issue's contributions as an underlying thematic current. The crisis and the often ensuing austerity measures mean lean times for lifelong learning almost across the continent.

INTIME ON TIME

AND THE WINNER IS....

POLICY

Rimantas Dumčius and Donatas Pocius

**WHO PAYS FOR TRAINING?
-COST-SHARING MECHANISMS IN EUROPE**

Most education in Europe is financed by cost-sharing mechanisms. This article documents key types of financing instruments proposing also guidelines for better funding mechanism governance. These guidelines include more specific goal-setting, monitoring and better information services targeted at disadvantaged learners.

RESEARCH

Alexandra Damm and Carolin Knauber

FINANCING FURTHER EDUCATION IN GERMANY

Strategies of dealing with the economic crisis vary throughout Europe. Some countries, such as the UK, cut education funds massively, while others such as Germany, have invested in education as a survival strategy. Damm and Knauber offer a current snapshot of how further education is controlled through financing in Germany. Although supply-side, state supported financing is still dominant in the country, market-driven demand-side financing is becoming ever more popular.

Jasmina Mirčeva

EMPLOYEE EDUCATION AMID AUSTERITY

This contribution from Slovenia opens the thematic of employee education. Investing in human potential in Slovenian companies has been severely affected by the economic crisis. Jasmina Mirčeva presents research results on the impact of the crisis on the level of educational participation of employees and the fluctuations of state funding for formal and non-formal employee education.

The crisis does not automatically mean cutting employee training. In some cases the opposite is true. The author formulates three models of enterprises based on their responses to the crisis: companies having restrictive and saving policies in all areas, companies having restrictive policies but maintaining development educational activities and companies having policies of full development of human potential.

Peter Mayo

CRITICAL PEDAGOGY IN HARD FINANCIAL TIMES

Professor Mayo's article discusses education financing not from an economic or technical viewpoint, but from a philosophical one, drawing on critical pedagogy. There is no sense to talk of higher education or its funding without the systemic dimension: mainstream education discourse reaffirms the capitalist system. The author presents an alternative vision of lifelong learning as a social act for the creation and enhancing of democratic spaces, embodied by the ongoing global "Occupy" protests for social equality.

PROJECT PICKS

Pavle Tvaliashvili

**SMALL GRANTS PROJECTS
– THE FORMULA TO DISCOVER ONESELF**

State funding for adult education and community development is scarce in Georgia. Paradoxically, local NGO's have found this austerity to be liberating from strict regulations in their work for empowering poor rural communities through education. This case study shows how small-grants projects can be educational tools in their own right, as a comparison between a project management cycle and David Kolb's adult learning cycle demonstrates. Community members' active agency in a project allows them to develop a sense of initiative and entrepreneurship.

INTERVIEW**PINCHING THE EURO**

The Eurozone crisis is cutting adult education resources across Europe. We meet four adult education professionals to find out if and how the recession is affecting their daily work. Among the interviewees are a university professor, a ministry decision maker, a lifelong learning advocate and a folk high school principal.

ARTICLE SERIES: INDIGENOUS KNOWLEDGE

Timote Vaioleti

LEARNING AS SPIRITUALITY AND NURTURE – PACIFIC INDIGENOUS PEOPLES' PERSPECTIVE OF LIFELONG LEARNING

This article series documents lifelong learning traditions of indigenous cultures across the globe. Timote Vaioleti, of New Zealand, discusses characteristics of adult education practice for peoples in the Pacific. For many Pacific peoples learning is holistic and spiritual and driven by a desire for collective rather than individual gains. In sum, learning means being connected to God, ancestors and nature.

REVIEW

Stephen Murgatroyd

A TOUR OF A WORLD IN CRISIS

Ball, S.J., Maquire, M. and Goodson, I.F. [Eds.] Education, Capitalism and the Global Crisis. London: Routledge, 2012.

SPEAKERS' CORNER

Gleb Bogatskiy

THIS CRISIS WILL MAKE US LEARN

Investing in lifelong learning

Our present issue of LLinE "Financing lifelong learning" is situated in a time during which Europe is experiencing very challenging social and economic times. Eurozone crises are affecting all of us at many different levels and in many different ways. We can read devastating news about constantly rising figures of unemployment within Europe, particularly among youth. For example, according to Eurostat in the year 2011 more than 45 percent of the workforce under 25 years old was unemployed both in Greece and in Spain. The situation is not much better in Portugal, Italy, Ireland, Latvia, Lithuania and Slovakia where about one third of the youth is without a job. In Finland, the situation is not that different either, the unemployment rate of youth being slightly below 20 percent. When we take a glance at the whole of Europe, we can learn that more than 20 percent of the European youth population is unemployed, whereas the unemployment rate in Europe is altogether about 10 percent. In all, these figures are dramatic, alarming and unfortunately still rising. They undoubtedly bring with them serious economic and social challenges for Europe, its nations and individuals. These are to do among others with increases in economic inequality, perceived job security, and, in many cases poverty and social exclusion.

At the same time with economic and social crises, and partially just because of them, more and more individuals, communities and nations are beginning to recognize and address the importance of education and lifelong learning opportunities based on equity and equality as a means of ensuring wellbeing, wealth and prosperity among individuals and their societies. In addition to equipping every learner for life and work in the 21st century, there is evi-

dence that investments in education and lifelong learning opportunities are likely to yield returns in significantly reduced health care costs, crime and welfare later on, not to talk about increases in individuals' positive self-esteem and personal empowerment. Learning is seen as an essential basis for progress in the "knowledge society"; it is critical for economic growth, social welfare and identity development.

But how to develop and even maintain public education and lifelong learning opportunities for all in today's financial environment? How to make wise decisions on investments in education and provision of lifelong learning opportunities? How to monitor their success and impact at societal and individual levels? The purpose of this issue of LLinE is not to provide a doctrinaire adherence to these questions. In fact, there are no simple and clear-cut answers to them. Rather, I hope that this issue contributes to our thinking and imagination of the ways in which research-based knowledge on financing lifelong learning can help us in our efforts in turning negative social and economic trends positive for every individual and nation in Europe and beyond.



KRISTIINA KUMPULAINEN
 Editor-in-Chief of LLinE
 Professor of Education
 Department of Teacher Education
 University of Helsinki

And the winner is...

The London Olympic Games kick off on the 27th of July, 2012. A massive endeavour, the Games' public sector funding budget amounts to 9,3 billion pounds, equal to over 7 billion euro. A definitive estimate of the costs of the Games is hard to come by, however. Some analysts predict that the Olympics' expenses might spiral up to 11 billion or more (Parliament, 2011; ODA, 2012).

At the same time the UK has been cutting education budgets drastically (BIS [2], 2010). Further education resources, including adult further education, will be decreased by 25 % by 2015. Higher education funding will go down 40 %. In terms of pound sterling this means that in 2011–2012 the total spend on the employment and skills systems England is projected to be 8,3 billion. Of this sum, the share of the Skills Funding Agency, which funds adult Further Education and skills training

in England, is 3,2 billion (UKCES, 2011, p.6). Of this resource, 210 million pounds is reserved for “Adult Safeguarded learning”, which includes informal adult and community learning.

The Conservative government pays at least lip service to the benefits of adult learning. The Big Society initiative's vision is of all adults having the “means, motivation and opportunity to acquire new knowledge, gain new skills and pursue their passions. That is why we have protected the budget for informal adult and community learning (BIS [1], 2010).”

REFERENCES

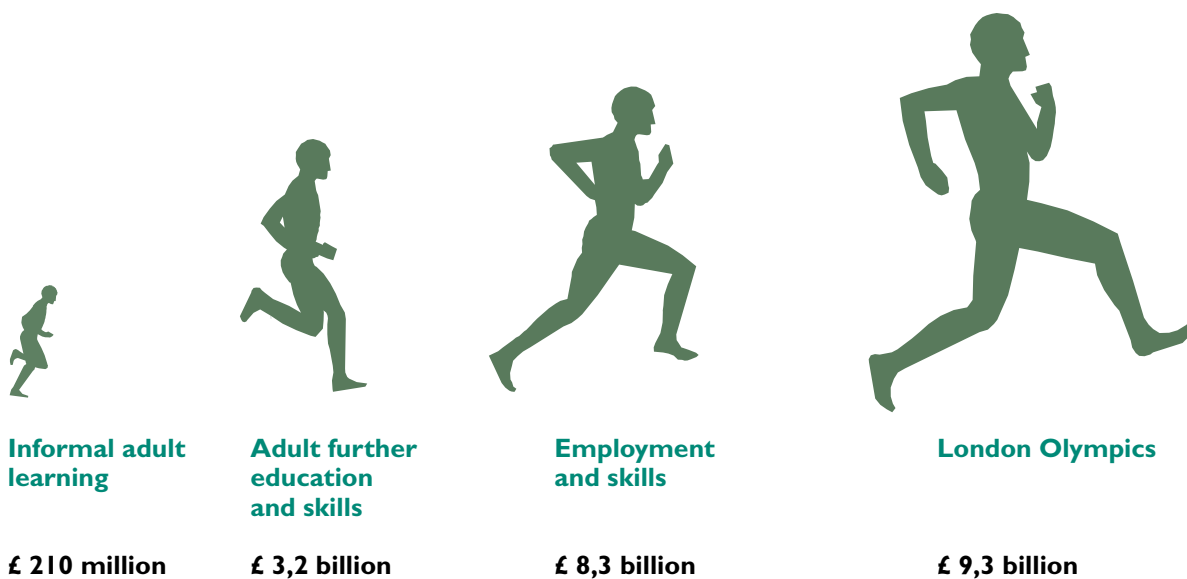
Department for Business Innovation and Skills (BIS) [1]. (2010). *Investing in Skills for Sustainable Growth*. Retrieved from <http://www.bis.gov.uk/assets/biscore/further-education-skills/docs/s/10-1272-strategy-investing-in-skills-for-sustainable-growth.pdf>

Department for Business Innovation and Skills (BIS).[2] (2010). *The Spending Review 2010*. Retrieved from <http://www.bis.gov.uk/news/topstories/2010/oct/bis-csr>.

Olympic Delivery Authority. (2011). ODA Plan and Budget 2011. Retrieved from <http://www.london2012.com/documents/oda-publications/oda-plan-2011.pdf>

www.Parliament.uk. (2011). *Preparations for the London 2012 Olympic and Paralympic Games*. Retrieved from <http://www.publications.parliament.uk/pa/cm201012/cmselect/cmpubacc/1716/171603.htm>

UKCES. (2011). *Review of Employment and Skills*. Retrieved from <http://www.ukces.org.uk/assets/ukces/docs/publications/review-of-employment-and-skills.pdf>



Who pays for training? – Cost-sharing mechanisms in Europe

Who should pay for education? The state, private sector and training beneficiaries all stand to gain from lifelong learning, especially in crisis times. Hence, cost-sharing in education funding is an obvious solution in most European countries. This article documents key types of cost-sharing instruments used in Europe. The authors argue that the poor target-setting, monitoring and user guidance of these instruments often hinders their efficiency: the authors then propose guidelines for better funding mechanism governance. The article is mostly based on original research recently conducted by the authors on behalf of Cedefop.

Rimantas Dumčius and Donatas Pocius

The recent economic and financial downturn raised a number of questions on what strategies should be taken by key actors at national and international level to ensure that the recovery of the economies is as speedy and smooth as possible.

One of the most widespread explanations about the origins of the crisis include the credit crisis in the United States. There have also been certain voices claiming that the productivity decline worldwide could have been a major contributor to the decline of the real economy.¹ Increasing the labour productivity seems to be one of the certain strategies to be taken, and this has been recognised, among other occasions, in the new European growth strategy “Europe 2020”.

Growing unemployment in various European countries has been one of the most noticeable outcomes of the crisis, and the European policy makers at various levels have on several occasions mentioned that securing jobs and increasing employability should be one of the main priorities of the governments.

Both the productivity and the employability are subject to the skills possessed by the population. The low skills held by the labour force do not allow high productivity, and the existing mismatches between the supply and the demand of skills in the labour market mean that the employers need different skills than those available from the potential employees. Therefore, both productivity and employability problems may be solved by increasing the development of the skills which are needed by the labour market and which could increase the labour productivity.

Unfortunately, skills development is not only a beneficial, but also a costly activity. The most straightforward are the direct costs of training – such as the tuition or participation fees, or the costs of training materials. There are also,

however, significant indirect costs stemming from the missed opportunity (e.g. foregone income) or additional expenses needed to take the training (e.g. travel, accommodation, child care, competence assessment etc.). Even taken separately, the costs such as tuition fees or foregone income may be quite substantial – and when there are several types of costs related to a single training activity, the burden becomes even more significant. The obvious question arising is who should take the responsibility for these costs.

The fact that higher participation in education and training create long-term benefits for the overall economy and society of the country would imply that the public actors should contribute to such an investment. However, even during the prosperous economic times this would be limited by budgetary constraints in certain countries, let alone during the crisis when the public expenditures are being cut across Europe.

Meanwhile, the most pronounced and clear benefits from certain training activities are received directly by the users – the trained individuals and their employers. This is evidenced by the fact that the demand for training and improvement of qualifications increased during the downturn, as more people became concerned with staying competitive in the labour market. However, economic downturn also limited the ability of the private actors to invest in training.

The quite obvious solution to this conundrum is to somehow share the costs of training between the public and private actors, because all sides stand to receive significant benefits, yet it is too costly for any one of them to finance it all alone.

There is a variety of cost-sharing mechanisms and regulatory instruments in European countries. Each of them has a different logic and functional design. The growing interest in these possibilities to share the costs of training has been shown

Key types of EU cost-sharing instruments

The key types of cost-sharing mechanisms and regulatory instruments used in Europe include:

Training funds. This type of instrument is basically a flow of funding allocated to training which is not part of the public budgetary channels. In other words, the financial contributions in the form of levy are collected from participating companies, and then are used either to directly finance the public provision of education and training, or are redistributed by offering training grants to companies. Costs of training are shared among different companies and/or companies and the government.

Tax incentives. Usually, the taxation laws in many countries foresee that the taxes paid by the companies and/or individuals may be reduced if they have certain expenses beneficial to the society at large. Very often such deductible expenses include training costs. Two different types of tax incentives are distinguished based on the basis for the deduction. In the case of tax allowances (exemptions), the deduction is made from the tax base, while under the tax credits the deduction is made from tax payment.

Grants and vouchers. Similarly to tax incentives, these types of instruments may be provided both to companies and to individual learners. Grants and vouchers constitute a subsidy made from the public (either national or EU) budgets to compensate (usually part of) the training costs suffered. The distinction between the vouchers and

grants is made based on who is the direct recipient of the funding – in the case of grants it is the beneficiary, while the vouchers mean that the funds are transferred to the training providers. At the national level, however, the naming of vouchers and grants is quite confusing and does not always meet this definition.

Saving schemes. Such instruments are primarily directed at individuals and create a possibility for them to save part of their income and use it for training purposes in the future – this not only assists the learner to accumulate her/his own financial resources, but also may be complemented by contributions by employers or public actors to the individual's saving account.

Loans help to solve the liquidity constraints suffered by potential learners. They are lifted by public or private actors offering a possibility to borrow money for this purpose. The income-contingent loans are in particular beneficial in this regard, as they offer more safety to beneficiaries by allowing them to repay the borrowed funds proportionately to their income. The governments may play various roles in facilitating the process of obtaining and repaying the loan, e.g. by providing a state guarantee when the money is lent by private actors, or offering to compensate part of the interest.

Training leave and payback clause arrangements are not considered to be financing, but rather regulatory instruments having financial repercussions to the key actors involved. Training leave is applied

to guarantee the potential learners the possibility to have spare time from their work tasks to attend training. The earnings which are not obtained by the individual through work during the training period may be compensated either by the employer, or by public actors. The payback clauses, meanwhile, allow the employers to make the learners repay the costs spent for their training if the employees quit their job.

by the European Centre for the Development of Vocational Training (Cedefop), which recently conducted a number of studies on different types of such mechanisms and instruments. A concise and thorough analysis of all the existing mechanisms and instruments is the subject of the study on Financing Training in Europe that is being prepared for publication at the moment. In the adjacent box we present the key types of cost-sharing instruments used in the EU currently. The theoretical literature identifies other types of training financing instruments, but the mentioned types were the only identified in European countries during the recent research efforts.

MAPPING EUROPEAN COST-SHARING INSTRUMENTS

The recent research efforts made by Cedefop used surveys of national lifelong learning experts, as well as additional requests for clarifications, as a method to gather reliable information on what instruments are used in which countries, and what different varieties of these instruments exist. The obtained information was additionally grounded by documentary evidence and statistical information.

Over 550 of different such instruments were found to be functioning throughout

the European Union in 2011. The training funds were by far the most numerous, reaching nearly 300. This was due to the fact that many training funds functioned at a sectoral level and in countries such as France or the Netherlands the number of such instruments was close to 100. However, they were not used in all of the EU countries – the newer Member States in particular applied them much more seldom. The vouchers and grants were also highly popular, with approximately 30 instruments for companies and 80 for individuals. The rest of the instruments were less numerous, but could still be noticed in most of the countries.

The exception is the saving schemes, of which there were only three instances identified in two countries – Austria and the Netherlands. Due to the large numbers of instruments identified, a sample of them was selected for a more in-depth analysis, the rule of thumb for selection being that one instrument of a certain type should be analysed per country and that the more peculiar and interesting examples of the instruments should be selected.

The EU countries reflect different traditions of sharing the costs of training, and the popularity of such instruments is not equal everywhere. Countries such as the Netherlands, the United Kingdom, or Germany applied almost all possible types of instruments, whereas in Cyprus, Greece or Malta they were implemented very rarely.

GOVERNANCE ISSUES

The recent research not only identified the instruments for the cost-sharing related to training, but also collected information about their key design characteristics and performance both in terms of factual data and the opinions of the key stakeholders related to the implementation of such instruments. The key questions tackled were the **effectiveness, efficiency,**

equity, impact and sustainability of the instruments. This provided an opportunity to reflect on the status quo of sharing the training costs in Europe and to draw some key conclusions and recommendations for future actions. The focus in the present article shall be put on the governance of the cost-sharing mechanisms and regulatory instruments.

The governance issues addressed in the above-mentioned Cedefop survey include setting of objectives and targets for the instruments, monitoring and evaluation of the progress of their implementation, and offering sufficient supporting actions, such as guidance and information services to (potential) users.

Clear goals

The first precondition for successful operation of cost-sharing instruments lies in the setting of their objectives and targets. When it is clear what the certain instrument tries to achieve and what conditions need to be fulfilled for it to be considered successful, a strong incentive is created for the managers and stakeholders of the instrument to put in efforts so that the objectives and targets are reached.

Good monitoring

In the ideal case, the progress of the certain instrument towards the objectives and targets should be measured using sound, regular and well-planned monitoring and evaluation efforts. This allows for a policy learning process: the successes and failures of the instrument may be considered based on the collected information, and modifications may be introduced making sure that the strengths of the instrument remain and the weaknesses diminish. The monitoring and evaluation also allows the managers of the instrument to make sure that there is no significant waste of public or private money, no abuse or loopholes in the in-

strument, that the support goes to those beneficiaries who truly need it, and that the training obtained truly contributes to the benefit of the public at large and not only to the private interests.

Guide the beneficiary

Finally, the information and guidance services are important in making sure that the potential beneficiaries know about the possibility and know how it could be best used in their particular situation. This increases the efficiency and effectiveness of the instrument and may also open the opportunities for the disadvantaged users who may be the ones needing support the most.

GOVERNANCE AFFECTS IMPACT

The importance of good governance has been proved by the research recently conducted by Cedefop: the instruments with better set objectives and targets were considered by the stakeholders to be performing better, especially in terms of deadweight effect (supporting only training which would not have taken place without the intervention). Conversely, a bad setting of objectives has been related to those instruments that are not particularly aimed at beneficiaries that typically under-participate in training or learning.

Effectively, such public funding could have reinforced the established trends of (under)investment in training of certain groups of companies and individuals. Moreover, even some of the best performing instruments (e.g. vouchers and grants for individuals) offer some evidence of beneficiaries opting for cheaper and not necessarily better quality courses. The guidance and information efforts have been reported to increase the equity of the instruments and increasing the participation particularly of disadvantaged groups (this was especially the case, e.g., in the grant and voucher schemes for individuals).

“Self-fulfilling goal-setting should be avoided.”

PROBLEMS WITH GOVERNANCE

However, in practice the ideal governance arrangements are rare. The problems with the governance of instruments usually start from setting of the objectives and targets. Many of the instruments do not have any objectives set for their functioning, and those which do quite often relate them to the specific function of the instrument – for instance, the objective of a certain training fund would be to provide financing for training of employees in companies. Such objectives are self-fulfilling – if the instrument is implemented, it is obvious that it will be providing funding. There is still nothing for the instrument to seek and to achieve. Only half of the training funds, and virtually none of the tax incentives have any specific objectives set. The situation is much better with grants and vouchers for companies and individuals, majority of which have specific objectives.

Any sort of *quantified* targets are even more difficult to come by among the cost-sharing instruments – even among the training funds and grants/vouchers: a very small share of instruments have them. This is particularly striking in the case of grants, many of which are co-financed by the European Social Fund (ESF). The monitoring and evaluation efforts were widespread among the grants and vouchers, especially for companies, but much less noticeable in the case of tax incentives, where usually only formal financial and eligibility data are analysed, but no efforts whatsoever are taken to see whether the incentive really provides benefits for the society intended upon its introduction.

Guidance efforts, including the personalised ones, overall have been re-

ported to be widespread, especially in terms of information available on the internet and in paper versions of the promotional material. However, in a number of instruments the stakeholders reported that more proactive measures helping the disadvantaged groups in particular are missing. In other words, the information and guidance is usually available for those who ask, but not for those who could be interested, but fail to take the first step due to their disadvantaged position.

THE WAY FORWARD

The lack of basic good governance arrangements in the analysed cost-sharing mechanisms should be dealt with as a matter of priority. There are a number of issues which should be taken into account by policy makers trying to create effective cost-sharing instruments in the future. When referring to policy makers we refer primarily to the national level. However, there are some developments in the common EU policy on separate cost-sharing instruments or the issues which are very relevant to them. For example, there is a planned European student loan for mobility purposes. The structural funds can also be mentioned in this context, as many grants are given in a large part by using this source of money. However, at present it would be hard to talk about a common European policy for cost-sharing instruments.

The first important thing while creating a new instrument is to have a clear idea of the rationale, objectives, and targets. In other words, it should be known why the instrument is actually needed, what it is supposed to achieve and what results would have to be present for the instrument to be successful. Monitoring arrangements would need to be introduced universally, including responsible institutions drawing up regular monitoring

reports and systems to collect monitoring information.

The most frequently heard criticism regarding the extensive governance of cost-sharing is the increasing administrative cost of well-governed instruments. However, such argument does not actually hold true. Lack of governance may lead to situations where the instruments have significant participation if the conditions offered are good, but also large deadweight and low access to the vulnerable groups. This is shown clearly by the example of tax incentives, but is also quite clearly pronounced in other types of instruments. The possibility for abuse and waste of public funding dramatically increases when the governance is poor. In times of significant budgetary constraints and lack of certainty about the future in many EU countries, it is not affordable to not know where the public funding goes and what benefits it brings. It seems that many instruments are in a vicious circle – they are insignificant due to low levels of funding, while the levels of funding cannot increase when their significance cannot be demonstrated to policy makers and other stakeholders. All this is exacerbated by poor evidence base and poor governance.

Meanwhile, the governance measures use only a fraction of public budgets available for stimulating private investment in training. Thorough assessment of the mechanisms and instruments would support taking well informed decisions when the economic recession necessitates cutting back public spending and would help to focus the remaining resources on the most productive and necessary investments. The crisis has been reported to have affected some of the instruments and forced them either to close or significantly diminish the benefits they can bring to the users. The worsening capacity to finance cost-sharing mechanisms should not force the policy makers to look for the easiest decision and abandon

the useful arrangements, but rather should stimulate greater attention to their effectiveness, efficiency, equity and impact and result in better targeting and enhanced governance standards. The managers of the instruments should more intensively monitor/ evaluate the effects of the measures and analyse the needs of the target groups.

The policy makers and managers of the instruments should make sure that the instruments are able to reach the disadvantaged groups in particular. More instrument-specific guidance and information services targeted at disadvantaged persons should be provided.

Finally, the recent research efforts have been very important in understanding better the functioning of the cost-sharing instruments in Europe. The research should be continued particularly at national level by in-depth analyses of the impacts and equity of individual instruments, which would improve the evidence base for comparative analysis at European level. The previous efforts have had to rely heavily on the opinions of stakeholders, as the statistical data for most of the instruments was particularly scarce. A better collection of national and European data, and standardisation of what is collected, would be extremely beneficial for future research. Collection of for example better statistics might be best achieved with collaboration at the EU level.

Such efforts would be able to ensure a successful policy learning process at the national and European level and create the instruments which use both public and private funds without creating waste and abuse. The resulting increase of investment in training and its better targeting should be one of the major keys to better productivity, matching of skills and employability, and in turn to a prosperous and secure economic future of European countries.

ENDNOTE

- 1 http://www.oecd.org/document/30/0,3746,en_2649_33715_42579358_1_1_1_1,00.html

REFERENCES

- OECD. (2009). *The real economy and the crisis: revisiting productivity fundamentals*. Retrieved 20 June 2012 from: http://www.oecd.org/document/30/0,3746,en_2649_33715_42579358_1_1_1_1,00.html
- Cedefop. (2009). *Sharing the costs of vocational education and training: An analysis of schemes in the newer EU Member States*. Cedefop Panorama series; 182. Luxembourg: Publications Office of the European Union.
- Cedefop. (2012). *Loans for vocational education and training in Europe*. Research Paper No. 20. Luxembourg: Publications Office of the European Union.
- Cedefop. (forthcoming a). *Training leave to promote VET in Europe*. Luxembourg: Publications Office of the European Union.
- Cedefop. (forthcoming b). *Payback clauses to promote VET in Europe*. Luxembourg: Publications Office of the European Union.
- Cedefop. (forthcoming c). *Financing training in Europe*. Luxembourg: Publications Office of the European Union.

DONATAS POCIUS

Donatas has been working in Public Policy and Management Institute (PPMI), in Vilnius, Lithuania, since 2008 and holds more than 3 years of experience in public policy research, mostly as a research team member in projects related to education and labour market policies. During his work, he has contributed significantly to provision of policy advice in these areas to the European Commission. He is also heavily involved in various project management activities and has been managing several EU funded framework contracts.

RIMANTAS DUMČIUS

Rimantas has worked with public policy assignments since 1998 – first as a civil servant and later as policy researcher and public management consultant. He led PPMI's applied research and policy evaluation teams since 2001 focusing mostly on education, employment and social policies. Rimantas has acquired a significant track record in managing international teams and working for international clients such as European Commission. He has MA in Political Science.

CONTACT

Donatas Pocius,
 Researcher / EU Framework Contracts
 Manager
 Public Policy and Management Institute
 Gedimino ave. 50, LT -01110 Vilnius,
 Lithuania
 Tel. +370 5 249 7538
 Mob. +370 699 66 477
 Email: Donatas.Pocius@VPVI.LT
www.ppmi.lt

Financing further education in Germany

Germany has a highly differentiated system of financing further education, which goes back to the division of legal financing responsibilities between the federal government and state governments. Moreover, there is a division between three “financiers”: public authorities (federal government, federal states and local authorities), companies and consumers. Furthermore, financing of further education in Germany is balanced between and steered by the two approaches of supply-side and demand-side financing. Demand-side financing becomes more and more popular even though supply-side financing remains the dominant system of further education.

Alexandra Damm and Carolin Knauber

INTRODUCTION

Further education, the translation of the German word “Weiterbildung”, encompasses all education (except university “higher education”) beyond compulsory schooling. It can be seen as a part of the term lifelong learning, which is used rather loosely to cover all forms of post-compulsory education including family education, community education, traditional adult education, further and higher education and continuing professional development (see Fieldhouse 1999, p.22). In Germany both terms are used in the discussion about financing and are not always differentiated from another or used consistently. Therefore, both terms will be used in the following text.

In the last years, the financing of further education and lifelong learning became increasingly important in Germany but also in many other countries of the European Union, especially after the signing of the Lisbon agenda. A reason for this development is of course the ongoing demographical change with a decreasing birth rate and a growing life expectancy leading to a higher average age of the population. Closely connected to this demographical development is the shortage of (highly) qualified workers and experts. At the same time, the increasing complexity of our every-day life, new technical developments and the low “half-life” of knowledge (The half-life of knowledge is the amount of time that has to elapse before half of the knowledge in a particular area is superseded or shown to be untrue) leads to a need of education of the individual in private as well as in vocational contexts. To improve this situation, the implementation of suitable instruments to acquire new and improve old competences and qualifications is crucial.

When trying to describe the structures of financing further education in Germany adequately, the problem of having a highly differentiated system is evident (Hummelsheim 2010, p.10).

Various financiers¹ and responsibilities exist between federal government and state governments, a pluralism of education providers, the dominant market allocation and the subsidiary role of the state. This article draws special attention on the different financiers and the control of further education through financing.

Financing is a central instrument to steer processes and pursue certain objectives. Therefore, the objectives of the financiers, the method of financing further education, and the volume of capital invested in further education significantly influence what further education measures look like, on which target groups they focus, which approach they use, and which aims they pursue.

The term “financing” as such will be used in the following text in a broader sense, meaning the availability of resources (time, money, psychological and institutional resources) and not only a budget (see Expert commission “Financing of Lifelong Learning”, 2004, p.290 and Timmermann, 2003, p.23). Furthermore, the matter of financing further education has a relatively underdeveloped data basis. This article is therefore focused on describing the most important aspects of financing further education in Germany without providing a complete overview of the data basis.

The following text comprises three distinctive but cohesively linked parts. The first part of the text gives a short historic overview of further education financing in Germany. The second part describes the different groups of financiers in Germany and the last part of the article covers the steering of further education through demand-side and supply-side financing.

FURTHER EDUCATION IN GERMANY – A HISTORIC OVERVIEW

The following paragraph gives a short outline of the historic evolution of awareness for the financing of further education and the development of a

political framework for its financing in Germany.

A legally regulated financing of adult education was introduced in Germany in the 1960s. The “Deutscher Bildungsrat” (German Council for Education) shaped this formative phase through the demand that institutionalised further education needs to become an additional and comprehensive part of the education system after school.

Germany is a federal republic with 16 federal states. The federal states and their state governments are largely autonomous concerning their internal organisation and have their own constitution. Tasks and responsibilities are divided between federal government and state governments through the principle of subsidiary. Responsibility for further education in Germany lies mainly with the federal states, and legislation can therefore differ from state to state. Besides the responsibilities of the state governments, the federal government is able – under certain legal pre-requirements – to be additionally active in certain fields, e.g. in vocational education (apart from school), in the development of basic principles of scientific further education at university, in the research concerning the efficacy of further education, and in developing new areas of responsibility through model measures (Nagel & Jaich, 2002, p.230).

In 1969, the federal government passed the “Arbeitsförderungsgesetz (AFG)” (Employment Promotion Act) and the “Berufsbildungsgesetz (BBiG)” (Vocational Training Act), which provided the legal framework for vocational education and its financing. More detailed and expanded laws (e.g. for a paid education leave) followed shortly afterwards in the different federal states.

Today, in times of global competition for resources, the financing of further education and lifelong learning (besides vocational education only) becomes increasingly important. In Ger-

many, the relevance of this issue was recognised, and the Federal Ministry of Education and Research founded the expert commission “Financing of Lifelong Learning” in 2001. Furthermore, in 2008, the federal government founded the initiative “Lernen im Lebenslauf” (Lifelong Learning) to financially support individual activities in further education and lifelong learning.

Even though Germany recognised the importance of financing lifelong learning, the topic is not consistently aligned concerning educational fields (e.g. primary education, secondary education, vocational education, etc).

However, this inconsistency or - in other words - the fragmentation of financing lifelong learning is not only a German phenomenon, but a European one. Timmermann (2003, p.16) comments on this situation: “educational financing policies in most of the EU countries are segmented”. As a result, each field of education and additionally every further subdivision within a specific educational field (e.g. vocational education can be subdivided into apprenticeships, further training, training for additional qualifications, etc.) has its own budget.

The fragmentation of educational fields is also a fragmentation concerning different interests at which educational measures are aimed.

Interests are based on underlying values and hence can include much tension. Is further education and lifelong learning an individual service or a social good? Should further education and lifelong learning be controlled by the market or by the state? Should further education and lifelong learning be oriented towards efficiency or towards equality?

To find out about the financing of different educational fields, it is important to ask which general understanding of further education and lifelong learning (with its objectives and values) do specific financiers have?

Concerning its orientation of financing, Germany is caught in the middle,

due to the different financiers and different sources of financing and a control by the market through demand-side financing as well as a control by the state through supply-side financing of further education.

FINANCIERS OF FURTHER EDUCATION IN GERMANY

Hummelsheim (2010) defines financiers as follows:

“With reference to the broad term of financing, a financier should be understood as the actor, who supplies further education with resources, such as time and money. In a definition going back to a narrow understanding of financing, financiers are seen as actors, who provide liquid funds for the financing of further education as ‘payers’.” (Authors’ own translation of Hummelsheim 2010, p.20).

According to Jaich (2010, p.155), the German financing system of further education and lifelong learning consists at its core of three different financier groups:

- **Public authorities**, financing through the federal government, the state governments, the local authorities and the “Bundesagentur für Arbeit” (Federal Employment Agency)
- **Companies**, which run further education facilities, partly pay the costs of education and training for their employees, or release them for education measures
- **Consumers** of further educational measures and lifelong learning, who bear their own costs or invest their leisure time in participating in educational measures.

The overall budget with direct and indirect costs² for further education of all financiers in 2007 amounted to 49.1 billion³ Euros or 2.02% of the German nominal GDP. In 1997, ten years earlier, the budget was 2.32% of the nominal GDP and therefore a slight decrease of the budget over time (Hummelsheim, 2010, p.94).

Public authorities

Especially the public authorities are a complex financier as financing takes place on different levels. On the level of the federal government, instruments such as the “Aufstiegsfortbildungsförderungsgesetz (AFBG)” (Advanced Further Training Assistance Act), a law supporting people to acquire a specialised qualification as master craftsman, receive financial contribution. Especially the example of the AFBG shows that financing instruments of the federal government are often motivated by labour market policy and not by further education policy.

In contrast to that, state governments are more active (in legislative ways) in the context of further education policy. State governments as well as local authorities, for example, make financial contributions to the “Volks-hochschulen” (folk high schools, or Adult Education Centres).

The Federal Employment Agency is mainly a financier of vocational education and training measures for unemployed people.

Public authorities as financiers cannot be seen as a single actor, as they work on different levels and they can also not be seen as constant financiers, as the financing is highly dependent on the current political and economic situation. This became obvious in the drastically decreasing financial support of further education and lifelong learning through the Federal Employment Agency between 2001 and 2006, as a result of the political change in the federal government following the national election and an orientation towards more efficiency, less spending of resources and a general reduction of costs (see Jaich, 2010, pp.158–159).

“Lifelong learning financing is fragmented in Europe.”

As financing sources, public authorities use taxes, contributions and charges.

The financial volume (indirect and direct costs) of the public authorities, without counting the Federal Employment Agency, concerning further education amounted to 1.9 billion Euros or 3.8% of the overall further education budget in 2007. The Federal Employment Agency has a financial volume of 1.4 billion Euros - about 2.8% of the entire further education budget. In comparison of the past two decades, there is only a minor difference of the percentage of the public authorities excluding the Federal Employment Agency (3.5% in 1997 to 3.8% in 2007), whereas the percentage of the Federal Employment Agency drastically decreased – as mentioned above - in the same time period from 14.4% in 1997 to 2.8% in 2007 (Hummelsheim, 2010, p.95).

Companies

Companies as financiers are mainly interested in qualifying their employees through vocational education (training, workshops, apprenticeships, etc). They use own incomes, fees and public grants as financing sources. Companies can also benefit from tax reliefs and fiscal benefits in case they are able and willing to invest (more) private capital.

Companies are the biggest financier of further education in Germany. In 2007, they spent 27 billion Euros in direct and indirect cost of further education, which covers 55% of the total financial budget of further education. These numbers did not change much over the last decade (Hummelsheim, 2010, p.95).

Consumers

Consumers as financiers are especially active in financing vocational education and training (Bensel 2003, p.228) but also in financing education across a variety of topics (languages, leisure time activities, etc.). The individual consumer as a financier uses current income or

assets and scholarships as financing resource. Consumers are also encouraged to invest this money through training subsidies, learning accounts, tax relief and the possibility to get education loans.

The individual consumer is the second biggest financier of further education in Germany with 38.4% of the total further education budget or – in other words – 18.8 billion Euros. The individual consumer's percentage of the total further education volume increased drastically in the last years; in 1997 it still covered 26.9% (12 billion Euros) (Hummelsheim, 2010, p.95).

The European Union is missing in the Jaich's list of financiers (2010), despite playing an increasingly important role in the financing of further education and lifelong learning in Germany, for instance through the Socrates and Leonardo da Vinci programmes.

Mixed financing

Single-financing is defined as a singular financial support – in this case by one of the financiers mentioned above. Within the German system, mixed financing is considerably more common: different financiers provide funding for measures/projects/programmes/etc.

That certain offers (programmes, trainings, etc.) cannot be assigned a solitary funding source can be seen in the example of the “Volkshochschule”, which gets its budget not only from the public authorities but also from the consumer. Those Adult Education Centres gain about 40% of their budget from fees; they receive roughly the same amount from public authorities (local authorities and state governments), and about 20% of the budget are collected from “other revenues”, i. e. money from the federal government, the EU or other sources (cooperation, rental income, umbrella association).

Having identified the main German financiers, we now focus on the control of financing further education and lifelong learning in Germany through demand-side and supply-side financing.

“Unemployed are often excluded from demand-side financing.”

STEERING EDUCATION THROUGH FINANCING

As mentioned before, financing is a central instrument to steer objectives of further education. In Germany, the control of financing through public authorities is balanced by the duality of two approaches: the demand-side financing on the one hand and the supply-side financing on the other hand.

There are also two “ideal” conceptions: The market-conception, which understands further education as a private economic good, whose price is determined by supply and demand, and the state-financing conception, which understands further education as a public good, which should not just be steered by market mechanism like consumption and exclusion (see Balzer, 2001, p.16).

The supply-side financing or institutional financing is the traditional state-financing model in Germany, whereas the demand-side financing refers more to the market conception according to Balzer but is increasingly used by public authorities in Germany.

As a characteristic of supply-side financing, financial resources of the financiers are directly given to educational providers in form of project-based funds, public tender procedure etc. (Hummelsheim, 2010, p.23). Therefore, the support of supply-orientation in financing is always a direct support of education providers and programmes in order to supply offers of further education or lifelong learning. Thus, supply-side financing is a way to control and influence concrete programmes/courses etc. and their topics depending on the considered relevance. Through active promotion (through financing) of certain offers, the supply-structure of the market is affected.

Generally, supply-side financing aims to create a demand in the population with a concrete offer (Balzer, 2001, pp.19-22). This type of funding is mainly carried out through state/public or institutional financing for continuing vocational training and measures of the Federal Employment Agency. Institutional or supply-side financing of further education in Germany is currently dominant.

On the other hand, demand-side financing is, according to Hummelsheim (2010, p.19), determined through the individual financial contribution of the consumer of further education or through the support of the consumer by other financiers (e.g. public authorities) to economically enable them to use private capital to finance education. Individuals are therefore financially supported to develop a demand with the intention that this demand will furthermore develop a respective offer (Balzer, 2001, p.19).

This financial support can be in the form of vouchers, financial learning accounts, educational leave, scholarships or loans. Especially loans, financial learning accounts and also the covering of costs through the employer require an existing or future employment of the consumer. Therefore, unemployed persons or persons without work experience are often excluded from these instruments (Dohmen & Ramirez-Rodriguez, 2010, pp.5). **Please also see a list of financing instruments in Pocius & Dumėius' article on page 6–7.**

Dohmen and Ramirez-Rodriguez (2010, p.10) identify three different types of vouchers in Germany: "Prämiengutscheine" (bonus voucher) issued by the Federal Ministry of Education and Research, vouchers issued by various state governments and vocational education vouchers issued by the Federal Employment Agency. Especially the last mentioned voucher focuses on the financial support of educational activities of unemployed and low-qualified people. It needs to be noted that these vouchers only have a limited

range. A problem might be deadweight effects, meaning that people, who are already higher qualified, who would participate in adult education anyway and who would be able to pay the cost themselves, take the vouchers without a pressing (financial) need. This phenomenon is evident since only few people use vouchers, and most of these users are members of the middle-class. To improve the efficiency of these measures it could be useful to create and implement accompanying measures like guidance.

In addition to the mentioned instruments, the support of individual financing through incentives instruments can vary from general education subventions to specialised fund systems (Balzer, 2001, p.22). Although demand-side financing corresponds to an individual financing of further education and lifelong learning measures, "individual" is however to be understood in this case in a broad sense, "as consumers can be individuals as well as institutions [in the meaning of companies]" (Hummelsheim, 2010, p.24).

Demand-side financing becomes more and more popular even though supply-side financing is (still) the dominant financing system of further education in Germany.

A clear separation between both systems cannot be made. However, in view of the ongoing changes in society with an increasing individualisation, it can be assumed that those financing arrangements, which strengthen the sovereignty of demand, will be more and more in focus. Therefore, demand-side financing will probably extend its influence on the control of further education in Germany.

ENDNOTES

- 1 The term "financiers" is used in the following article in the meaning of sponsors or investors of further education.
- 2 Hummelsheim (2010, p.16) divides direct and indirect costs of further education. Direct costs cover fees for

courses and training and teaching materials and can be assigned directly to the financier. Indirect costs are so called "opportunity costs", which are the cost from the "income" of the second best (and not primarily selected) choice, e.g. when an employee goes to an educational training instead of working.

3 One billion= 10⁹

4 The terms "state" and "public" are used inconsistently in literature and are not further differentiated but used synonymously for this article (see Hummelsheim 2010, p.15).

REFERENCES

- Balzer, C. (2001). *Finanzierung der Weiterbildung. Abschlussbericht*. Frankfurt: Deutsches Institut für Erwachsenenbildung. Retrieved May 15, 2012, from http://www.die-frankfurt.de/esprid/dokumente/doc-2001/balzer01_01.pdf.
- Bensel, N. (2003). Financing lifelong learning: change and challenge for modern society. In Dohmen, D. & Cleuvers, B.A. (Eds.). *Finanzierung von Weiterbildung und lebenslanges Lernen*. (pp.226–229) Bielefeld: W. Bertelsmann Verlag GmbH.
- Dohmen, D. & Ramirez-Rodriguez, R. (2010). Aktuelle Trends der nachfrageorientierten Weiterbildungsfinanzierung in Europa. In Deutsches Institut für Erwachsenenbildung (Eds.). (2011), *Evaluation der Weiterbildungsmittel des Weiterbildungsgesetz (WbG) in Nordrhein-Westfalen*, Retrieved June 6, 2012, from <http://www.die-bonn.de/doks/2011-evaluation-weiterbildungsgesetz-nrw-02-anhang.pdf>.
- Dohmen, D. (2003). Perspektiven der Finanzierung lebenslangen Lernens. In Dohmen, D. & Cleuvers, B.A. (Eds.). *Finanzierung von Weiterbildung und lebenslanges Lernen*. (pp.230–235) Bielefeld: W. Bertelsmann Verlag GmbH.
- Expert Commission "Financing of Lifelong Learning" (2004). Schlussbericht der unabhängigen Expertenkommission Finanzierung Lebenslangen Lernens: Der Weg in die Zukunft. Berlin: n.d. Retrieved May 15, 2012, from http://www.bmbf.de/pub/schlussbericht_

- kommission_III.pdf.
- Fieldhouse, R. (1999). Lifelong Learning. In Federighi, P. (Ed.). *Glossary of Adult Education in Europe*. Hamburg: n.d. Retrieved June 7, 2012, from <http://www.unesco.org/education/uiel/pdf/glossary.pdf>.
- Hummelsheim, S. (2010). *Finanzierung der Weiterbildung in Deutschland*. Bielefeld: W. Bertelsmann Verlag GmbH.
- Jaich, R. (2010). Finanzierung der Weiterbildung. In Deutschen Institut für Erwachsenenbildung (Eds.). *Trends in der Weiterbildung – DIE-Trendsanalyse 2010*. (pp.155–162). Bielefeld: W. Bertelsmann Verlag GmbH Bielefeld.
- Krug, P. (2003). Perspektiven der Finanzierung von Weiterbildung und lebenslangem Lernen aus Sicht der Länder. In Dohmen, D. & Cleuvers, B.A. (Eds.). *Finanzierung von Weiterbildung und lebenslanges Lernen*. (pp.236-238). Bielefeld: W. Bertelsmann Verlag GmbH Bielefeld.
- Lüthje, J.(2003). Sparen, Gutscheine und Darlehen – ein integriertes Konzept. In Dohmen, D. & Cleuvers, B.A. (Eds.). *Finanzierung von Weiterbildung und lebenslanges Lernen*. (pp.216–225). Bielefeld: W. Bertelsmann Verlag GmbH.
- Nagel, B. & Jaich, R. (2002). *Bildungsfinanzierung in Deutschland*. Baden-Baden: Nomos Verlagsgesellschaft.
- Timmermann, D. (2003). Finanzierung von Weiterbildung und lebenslanges Lernen – ein Überblick über die deutsche Diskussion. In Dohmen, D.& Cleuvers, B.A. (Eds.). *Finanzierung von Weiterbildung und lebenslanges Lernen*. (pp. 15–31). Bielefeld: W. Bertelsmann Verlag GmbH.
- Timmermann, D. (2005). Finanzierung Lebenslangen Lernens – Neue Ansätze für die Weiterbildung. Schlussfolgerungen aus den Befunden der Expertenkommission „Finanzierung Lebenslangen Lernens“. In *Hochschule und Weiterbildung*. Heft 1. Hamburg, (pp.7–24).



ALEXANDRA DAMM

Alexandra Damm is a graduand in Adult Education/Further Education at the University of Duisburg-Essen, having spent one semester at the University of Helsinki, Finland. She currently works for the German Institute of Adult Education - Leibniz Centre for Lifelong Learning (Bonn) in the projects 'Financing Adult Learning' (ALFi) and 'Promoting Adult Learning for Vulnerable Groups in Europe: Financing Instruments and Accompanying Measures' (VulGro).



CAROLIN KNAUBER

Carolin Knauber has the degree of Bachelor of Arts in Educational and Political Sciences (University of Heidelberg) and is graduand in the European Master of Adult Education (University of Duisburg-Essen). She works for the German Institute of Adult Education - Leibniz Centre for Lifelong Learning (Bonn) in the projects 'Financing Adult Learning' (ALFi) and 'Promoting Adult Learning for Vulnerable Groups in Europe: Financing Instruments and Accompanying Measures' (VulGro).

CONTACT

Alexandra Damm & Carolin Knauber
 German Institute for Adult Education
 – Leibniz Centre for Lifelong Learning
 Heinemannstr. 12-14, 53175 Bonn
 Tel: +49 (0)228 3294 - 235 / +49 (0)228
 3294 – 593
 Email: damm@die-bonn.de / knauber@die-bonn.de

Employee education amid austerity

Employee education in Slovenia has been severely affected by the economic crisis. This article presents some research results on the impact of the economic crisis on the level of educational participation of employees and particularly the financial arrangements regarding employee education and training to overcome the crisis. The author also analyses the fluctuations of state funding for formal and non-formal employee education.

Three models of enterprises and their responses to the impact of the economic crisis have been hypothesized in this article: 1) companies having restrictive and saving policies in all areas, 2) companies having restrictive policies but maintaining development educational activities and 3) companies having policies of full development of human potential.

Jasmina Mirčeva

INTRODUCTORY REMARKS

Slovenia simply could not have avoided the economic crisis and recession which has affected almost the entire world. The crisis in the country was first manifested in the financial sector, where the purchase power of the population has decreased from 60.2 billion \$ (2008) to 58.56 billion \$ (2011), while the GDP p.c. fell down from 30.000 \$ in 2008 to 28.300 \$ in 2009, to reach a level of 29.100 \$ in the year 2011. Compared with the period of economic growth in 2007, when the real growth rate was 6.8%, that rate in 2009 fell down to minus 8%, and then reached the point of 1.1% in the year 2011. Meanwhile the public debt has considerably increased: from 23% in 2008 to 45.5 % in the year 2011. The overall position of the economy has had a direct impact on the labor market where the growth of employment has slowed down while the unemployment rate essentially grew: from 6.7% in 2008 to around 11% in 2011 (World Factbook, 2011). In 2010 the at-risk-of-poverty rate was 12.7% of the Slovenian population which was 1.4 percentage points higher than the previous year (Income and Poverty Indicators, Slovenia, 2010).

The complexity of the situation in the economy and the society contests the state policies with new challenges: how to relax the difficulties of the financial system, how to return to economic growth, to achieve higher stability of the system and more harmonious economic development? In addition, how to respect other factors of influence, apart from the economic ones – the achievement of an appropriate level of education, knowledge, the cultural and value systems of the population.

In EU sources (New Skills for New Jobs: Policy Initiatives in the Field of Education: Short Overview of the Current Situation in Education, 2010), it is emphasized that it is of utmost importance to keep up the trend of investment in efficient and equitable education to diminish the consequences of negative growth in Europe, as well as to determine the directions for renewed economic advancement and social development. That means that education must provide more appropriate knowledge and skills, which, in the case of Slovenia, is important for

by-passing the crisis and redirecting the unfavorable social and economic trends.

This article builds hypothetical and ideal type models of HR education responses of enterprises to the economic crisis, based on the wider research study "Effects of the Economic Crisis on the Education for the Labour Market Needs and the Educational Influence as a Factor of Recovering" carried out by Slovenian Institute for Adult Education. The research was an attempt to hypothetically determine the models of conduct and performance of firms in the time of crisis.

RESEARCH METHODOLOGY, EVIDENCE AND SAMPLING

For presenting the state of the affairs and analysis of the conduct of enterprises in the period of economic crisis, both qualitative and quantitative methods have been applied, again on primary and secondary sources.

The quantitative analysis which presents the facts of education and training of the labor active population is based upon indicators of the Labor Force Survey e.g. EUROSTAT, which provides the comparability of inclusiveness for time series. For the needs of this study, the comparisons have been made between the period before the appearance of the economic crisis and recession (2007), the period when the first signals of the negative economic growth came out (2008) and the later period when the position somehow stabilized (2009). Data from the sources of the Statistical Office of Slovenia have been utilized as well as sources from the Chamber of commerce of Slovenia.

A randomly selected sample of enterprises for analysis was chosen, including 15 companies: 6 of them in the Central region of Slovenia, three from the Northern region, 6 from other peripheral regions (Savinjska, Notranjsko-kraška, Goriška, Posavska, Gorenjska and Jugovzhodna Slovenia). All of them have been reported to have organized educational activities. Eight of them belonged to the industrial-production branches, the rest to service or mixed branches. 13 of them were large enterprises, two have been medium size companies. Twelve of them were in private ownership, three in public.

Later on, after the selection and during the field-work, the enterprises (e.g. units under consideration and research), have been classified into three groups: five of the enterprises have considerably been affected by the crisis and recession, five of them partly or slightly, the rest have survived well or even advanced. Several criteria have been utilized for this classification: analysis of companies' annual profits, cost/benefit results, production/productivity ratios, firing/hiring evidence etc. All this procedure led to our hypothetical modeling of enterprises into three groups, focusing then on their educational and LLL practices.

Within enterprises, beside performance-analysis, interview method and analysis of responses have been applied for obtaining opinions and stances on the management personnel and "human development" departments. This qualitative method helped very much to attain more evidence on problems on the "ground level", e.g. "contextual study". On the basis of the predominant replies and planned educa-

Table 1: Percentage shares of participation in LLL of total, active and employed population aged more than 15 years in Slovenia, in 2006, 2007, 2008 and 2009

	2006	2007	2008	2009
Total population	15.0	14.8	13.9	14.6
Active population	16.7	16.6	15.7	16.3
Employed	16.5	16.6	15.8	16.3

Source: EUROSTAT

tional activities, hypothetical and ideal type models of responses of enterprises to the crisis have been proposed.

SOME INDICATORS ON EMPLOYEE EDUCATION IN TIMES OF RECESSION

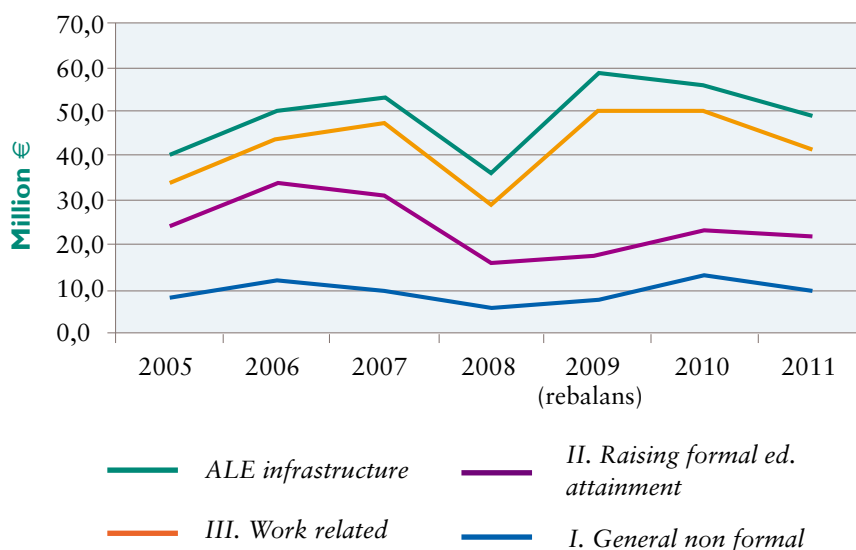
The evidence on the participation of adults (from 15 to 64 years old) in lifelong learning (LLL), which in the year 2010 reached 12.5%, indicates that Slovenia has outrun the EU policy objectives and thus belongs to the group of European countries with higher participation of adults in lifelong learning (European Commission, 2008; Eurostat, 2010).

During this period, the participation in education of the active population and the employed has been higher than that of the total population. It is visible that the share in the LLL of individual groups of population in the period 2006–2009 differed within 1.1%, while the trend reached its bottom line in 2008. Changes between years have been relatively minor, nevertheless they have been somewhat bigger in 2007/08 than in 2006/07, which could be attributed to the consequences of the recession (Dobnikar, 2011).

The variability of involvement in programs of non-formal education is considerably higher than in the programs of formal education. Involvement in non-formal education is higher in times of economic growth. In the time of the appearance of the first indicators of negative growth there is a fall, followed by stabilization. Contrary to that trend, the level of involvement in the programs of formal education proved to be less dependent on the current situation in the society and movement: in linear terms it increases. As the programs of formal education are, as a rule, of long-term character, it is possible that the educational process has begun before the appearance of the negative economic trends. Nevertheless, we can also guess that the position on the labor market had created a need for higher education as this would provide transferable competences and skills followed by higher stability of jobs or employability of a person (Mirčeva, 2011).

Funding of the programs of formal and non-formal education also follows

Picture 1: Distribution of funds in the annual adult education programs by priority fields and infrastructure, in million Eur.



Source: Drogenik, 2011

similar dynamics. Compared with the period of economic growth (2005-2008), in the year 2008 we have evidence of decrease of all financial sources, then, in the year 2009 we see again some growth of the funds, but with a negative trend (the level of unemployment has increased, exports and personal consumption decreased etc.) (See Picture 1).

In the year 2008, state financial support to the entire field of adult education was lower, while most deviations were found in financing adult learning and education infrastructure and work related programmes. The sharp fall of state funds reserved for formal education, which substantially decreased after the first shock

of the economic crisis, was surprising. The state finances the area of non-formal education the least, expecting that it would be funded by employers or individuals themselves. Non-formal education in this context would mean vocational training, language and computer courses and other educational and training activities not designed to obtain a higher educational level.

Let us see, in more detail, how the field of non-formal education was funded in the period of interest.

In the period of 2007/08, all the funds for non-formal education have fallen. Free-of-charge education suffered the most (Index- 71.22), particularly at the

Table 2: Indices of growth of sources of financial support for education and informal education in the last quarters of 2007/08 and 2007/09

The financial support of educational activities	2007/2008	2007/2009
Total	76.94	99.23
Individually or families	76.33	100.49
The employer	79.20	94.27
Education free of charge	71.22	119.56
Other	80.00	100.00

Source: Statistical Office of RS

beginning of the less favorable economic situation. Nevertheless, in the period 2007/2009, the index was lower than 100% only with the support of employers (94.27%). This meant that the number of those that have been in education and training with support of the employers in 2009, compared with the year 2008, again increased, although the level had not returned to the level of 2007. It nevertheless equalizes with the source “individuals or family”, while the source “education free of charge” has exceeded all the others (Index- 119.56).

If at the end of 2008 we witnessed a considerable decrease of all sources of financial support for non-formal education, at the end of 2009 the sources of support reached or exceeded the funding level for non-formal education, compared with the year 2007 (Dobnikar, 2011). However this result does not speak of the rise of participation in education as a consequence of the endeavors of employers to invest intentionally in this field; it would rather be a result of the better preparedness of individuals or their families to invest in their advancement and bettering of their competences. It could even be a partial result of the short-run measures of the state bodies in education of the employed, which could mean that those activities had become free of charge. Contrary to the trend of general decrease of financial support, the educational activities in many enterprises have been kept up or, for some of them, even increased. We will next explain the reasons for that trend and group Slovenian companies in three models, based on their reactions to the crisis and the ensuing training and financing.

REACTIONS OF ENTERPRISES

MODEL 1: A MODEL OF SURVIVAL: COMPANIES HAVING RESTRICTIVE AND SAVING POLICIES IN ALL AREAS.

In this model, the enterprises have mostly been grouped either in the production or service branch, the performance of which has worsened in less favorable times. Some of these enterprises have been almost at the edge of survival. This has also meant less favorable working conditions, a decrease in income, demand for more intense work and fewer possibilities

for career development. Because of uncertain performance, the enterprises in this group have taken a variety of measures, especially in the field of HR management. The aim of these measures is to synchronize the knowledge, skills and competences particularly of the management and key experts followed by other employees with the new needs of the companies and the community.

It would be rather difficult to generalize or to specifically identify categories, profiles and education levels of those who have been, in these circumstances, in the least favorable position or have been most exposed to losing their job. Nevertheless, our study indicated that the groups most exposed and typical in this sense were: those employed for “determined time” (contractual), those of older age and on the other hand younger workers, and those with shorter working hours, those with less than secondary school education as well as those with lower qualifications and competences, which is the largest group in the labor market.

Appreciation of education has, in enterprises of this type, followed the patterns of organizational culture and climate. Where the security of employment was higher, the apathy towards education was also higher while the readiness for further education was lower. The educational ambitions of employees, in such cases, have also been lowered by lower professional development orientation, lower requirements of the job and less possibilities for career advancement.

Vice versa, the level of readiness and interest for education and training was higher in enterprises with lower job security. This was a result, to a great extent, of reorganization, restructuring and redefining of the companies’ plans and the appearance of some new needs such as management in the time of crisis and risk reduction, requiring some new skills. However, at the same time the reason for the higher level of interest is that the knowledge, skills and competences, in such cases have become a protective factor and essential criteria for keeping the job.

Investments in education of employees have gone down in all the companies in the sample grouped in this model. In some cases, the reduction in education and

development funding was the first measure of savings when negative indicators of development had been detected. A general opinion of the management was that education was important but not necessary and in situation of deficit of sources it could be postponed for better times. If there have been some investments in educational activities, employers have directed them at personnel that was hard to find at the labor market, not at personnel that was easier to substitute.

MODEL 2: MODEL OF COMPANIES WITH RESTRICTIVE POLICIES BUT INSISTING ON MAINTAINING EDUCATION

The enterprises grouped under this model have felt the consequences of the economic crisis less. For most of them the level of activity and the staff composition remained unchanged, although the objectives, tasks and conditions have changed more often; the needs for acquiring new knowledge and skills, due to the situations and circumstances of less favorable economic circumstances and trends also appeared. This type of enterprise invested less in educational activities, but also endeavored to organize education with as much utilization of regional, state and foreign funds as possible.

The treatment of employees in these enterprises was seen as a way of improving labor productivity as well as achieving quality outcomes and overcoming uncertain and turbulent circumstances. Parallel with this, employees were expected to acquire specific knowledge, for instance on overcoming risks, optimizing work, intensifying work performance in individual departments etc.

An interesting phenomenon of restrictive measures noticed in the enterprises of this type was the redirection of external education into internal one in order to decrease expenses. It means

Security of employment breeds apathy towards education.

that instead of using the education and training services by external providers such as schools, adult education centers, private institutions etc., the employers arranged educational activities in their companies sometimes carried out by in-house staff. With this measure the employers intended to decrease expenses without the reduction of size or content of education. In such a way, despite the restrictive measures, the size of educational activities remained unchanged or was even increased.

According to the opinion of the management, internal education is often cheaper and more efficient. That is why this trend would not mean only saving measures but also a qualitative change, which would persist even after the end of the recession period.

MODEL 3: MODEL OF COMPANIES FULLY DEVELOPING HUMAN POTENTIAL

The enterprises belonging to this group consider the less favorable economic circumstances as a possibility for new impulses, for acquisition of specific knowledge and competences as well as for new business contacts and exchange. In several cases they were enterprises well prepared for the economic dip. Their managements had undertaken measures in time to effectively counter adverse market events, including also reservation of some funds for continuing employee education. We also suppose that all these measures, including employees' education motivation, flow from a sort of active and participative organizational culture.

The features of a typical enterprise within this model are: stimulating employees to adjust their conduct to demands of the companies' objectives, the appropriate evaluation of knowledge and competences which is an important component of an individual's promotion as well as high flexibility of employees and their quick response to challenges of the environment, which means that the employees could be prepared to perform tasks outside their normal range. The management is well aware that in times of changes the quality of the human potential is of es-

sential importance and is, therefore, ready to invest in that potential.

In enterprises of this type another common feature was identified. Despite differences in belonging to various branches, sizes, ownership compositions and crisis strategies, they all have unselectively opened access to new knowledge for all employees. Lifelong learning was not treated as a right and privilege of some individuals but as a necessity and duty of all, while rejection of permanent learning was treated as a rather serious offense and neglect of work duties. By such a treatment of educational activities, funds in this field have even increased, which means that the enterprises in this group have invested in education more than before the crisis.

EU INITIATIVE SEEKS TO BOOST SLOVENIAN NON-FORMAL EDUCATION

In order to reduce the effects of the crisis and to prepare for the economic upturn, an European employment support initiative was launched. Its main objective is to promote employment and reintegration into the labour market through activation, retraining and skills upgrading measures. In almost all key EU documents there is a stress that skill upgrading is critically important for Europe's short term recovery and longer term growth and productivity, the capacity to adapt to changes for equality, equity and social cohesion (New Skills for New Jobs, 2008).

The Slovenian operative strategy for the years 2010–2013 (2010) has now also focused on the policy of employment and labor market - the increase of the added value and the achievement of higher flexibility of the labor force through education and training of employees. In this regard, a particular emphasis has been put on increasing investments in education and training of the entire population and labor active population, first of all of those most vulnerable and - in terms of education - most unprivileged.

Investments in education will be directed, on the one hand to obtaining higher levels of education, as the European

documents envisage a growth of jobs for highly qualified and educated personnel, and on the other hand, to programs of non-formal education providing specific knowledge and skills for the needs of a variety of working places – in short, a mechanism for the acquisition of additional and modernized knowledge after accomplishing formal education (Mohorčič, Špolar et al., 2006). Consequently, working places should be designed in a way that makes the acquisition and utilization of the complexity of the skills possible.

CONCLUSION

In the period of adverse economic trends, investments have risen in the acquisition of some key competences (such as capability of solving problems, analytical skills, self-organization, ability of negotiations as well as non-routine skills). Employers have invested more in personnel with specific problem-solving potential. As a rule, these were managing and leading workers, experts as well as employees whose positions were liable to change, newly employed or those waiting for re-employment.

Regarding the investments in education, one could notice the unbalanced distribution of funds e.g. considerably higher share of investments in the groups of management and leading workers as well as in experts than in other categories. Once more this confirms the traditional rule that employers would rather invest in personnel whose skill-sets are rare in the labor market than in less educated and qualified. When jobs are cut due to financial hardship, the workers without appropriate knowledge, skills and competences are the first to go.

This article has documented company responses to the economic crisis in terms of employee education, grouping these responses into ideal type models. Automatic positive correlation does not exist between investments in education and

„Rejection of learning is seen as neglect of duty.“

business results of enterprises. No doubt many more factors have impact on these results.

At the same time, permanent learning and education are viewed not only as a possibility and right but also a duty in the companies fully developing human potential. This orientation is in accordance with the directions of the EU pointing out that knowledge, skills and abilities of the labor force are the crucial agent of innovation, productivity and competitiveness. Citizens should permanently modernize their work skills and develop general competences, which is the only factor of adjusting to rapid changes (Key Competences for LLL, 2006).

ENDNOTES

- 1 Following the proposals from the Commission one of the EU benchmarks is that 12.5% of the population aged 25 to 64 should participate in lifelong learning by 2010. Only seven Member States have exceeded the 12.5% benchmark: Austria, Denmark, Finland, Slovenia, Sweden and the UK – Spain was on the right track (10.5%).
- 2 Non-formal education is not designed to obtain a higher educational level e. g. a formal certificate, for instance a diploma or publicly recognized level of education, but the knowledge and skills usually connected to the interests and needs of individuals, employers etc.
- 3 Formal education makes it possible to obtain a higher educational level.

REFERENCES

Delovno aktivno prebivalstvo, registrirane brezposelne osebe in stopnje registrirane brezposelnosti po statističnih regijah prebivališča, Slovenija, mesečno. (2010). Retrieved November 17, 2010, from http://www.stat.si/pxweb/Dialog/varval.asp?ma=0700950S&ti=Delovno+aktivno+prebivalstvo%2C+registrirane+brezposelne+osebe+in+stopnje+registrirane+brezposelnosti+po+statisti%28nih+regijah+prebivali%29+ Slovenija%2C+mese%28no&path=../Database/Dem_soc/07_trg_dela/05_akt_preb_po_regis_virih/01_07009_aktivno_preb_mesecno/&lang=2

Drofenik, O. (2012). *Work of Adult Literacy and Adult Education Policies in the Education System in Slovenia.* Internal material SIAE.

Eurostat. (2010). *Education and Training.* (2010). Retrieved November 11, 2010, from <http://epp.eurostat.ec.europa.eu/portal/page/portal/education/data/database>.

Eurostat. (2010). Retrieved March 10, 2011, from <http://epp.eurostat.ec.europa.eu/portal/page/portal/education/data/database>

European Commission, Joint Research Center, Ispra. (2008). *Participation in Lifelong Learning in Europe: What can be measured and compared?* Retrieved April 15, 2012, from http://composite-indicators.jrc.ec.europa.eu/Document/Badescu_Saisana_EUR23511.pdf

Income and Poverty Indicators, Slovenia, (2010). *Statistical Office of the Republic of Slovenia.* Retrieved March 5, 2012, from http://www.stat.si/eng/novica_prikazi.aspx?id=4177.

Key Competences for Lifelong learning: European Reference Framework. (2006). *Official Journal of the European Union / L394.* Retrieved March 23, 2012, from http://europa.eu/legislation_summaries/education_training_youth/lifelong_learning/c11090_en.htm.

Mirčeva, J., Dobnikar, M. (2011). *Posledice recesije na izobraževanje za potrebe trga dela in vpliv tega dejavnika na izhod iz recesije.* Ljubljana: SIAE.

Mirčeva, J. (2011). *Izobraževanje zaposlenih v času gospodarske krize – pravica, privilegij ali nujnost.* In J. Mirčeva, *Gospodarstvo v recesiji in izobraževanje odraslih, zbornik prispevkov 15. andragskega kolokvija.* Ljubljana: SIAE.

Mohorčič Špolar, V.A., Mirčeva, J., Ivančič, A., Radovan, M., Možina, E. (2006). *Spremljanje doseganja Strateških ciljev izobraževanja odraslih do leta 2006: Preučevanje vzorcev izobraževanja odraslih.* Ljubljana: SIAE.

New Skills for New Jobs: Policy Initiatives in the Field of Education: Short Overview of the Current Situation in Education. (2010). Brussels: Eurydice. Retrieved March, 3, 2012, from http://eacea.ec.europa.eu/education/eurydice/documents/thematic_reports/125EN.pdf.

Resolucija o Nacionalnem programu izobraževanja odraslih do leta 2010. Ur. l. RS, št. 70/2004.

Slovenska izhodna strategija 2010–2013. (2010). Retrieved March 15, 2012, from http://www.vlada.si/fileadmin/dokumenti/si/projekti/Protikrizni_

[ukrepi/izhod_iz_krize/IZHODNA_STRATEGIJA.pdf](http://www.vlada.si/fileadmin/dokumenti/si/projekti/Protikrizni_ukrepi/izhod_iz_krize/IZHODNA_STRATEGIJA.pdf)

CIA World Factbook. (2011). Retrieved March 3, 2012, from <https://www.cia.gov/library/publications/the-world-factbook/geos/si.html>



JASMINA MIRČEVA

Jasmina Mirčeva, M.Sc. is presently employed at the Slovenian Institute for Adult Education, working as a researcher. She has graduated in sociology and acquired her master's degree in social management. In the last couple of years she has been working at several projects on participation in adult education, observation of educational systems and policies, education and training for the needs of the labour force, evaluation of the adult education programs etc. She was a coordinator of several projects such as Analysis of the Network of Adult Education Providers, Consequences of the Economic Crisis on the Education and Training for the Needs of the Labour Force, Participation of Adults in Educational Activities on Primary and Secondary School Level etc.

CONTACT:

Jasmina Mirčeva
Slovenian Institute for Adult Education
Šmartinska 134a,
1000 Ljubljana
Slovenia
Tel.: 00 386 1 5842 590
Email: jasmina.mirceva@acs.si

Critical pedagogy in hard financial times

Professor Peter Mayo takes issue with education financing not from an economic or technical viewpoint, but from a philosophical and systemic one, drawing on critical pedagogy. There is no sense, this article argues, to talk of higher education or its funding without reference to the capitalist system which the mainstream education discourse reaffirms. The author concludes with an alternative vision of lifelong learning as a social act for the creation and enhancing of democratic spaces, embodied by the ongoing global “Occupy” protests for social equality.

Peter Mayo

We are living in hard though interesting times. They are hard times in the sense that ordinary people are being made to pay for the lavish greed of a few beneficiaries of the Capitalist system, the 1 %, comprising CEOs and bankers, who have brought the world to almost inconceivable ruin, placing the burden of austerity squarely on the shoulders of the 99%. They are also hard times because, in North Africa and the Middle East, legitimate human struggles for work, dignity and genuine democracy have been and are still being met with some of the most brutal repression.

And yet we are also living in interesting times in which an attempt is made for politics to be rescued from the exclusive clutches of politicians and bankers. It is constantly being played out in globalised public arenas such as the squares and streets of Athens, Madrid, Cairo, Tunis, New York and Damascus, as a clear groundswell of dissent, indignation and tenacity is manifest and beamed throughout all corners of the globe. Meanwhile precarious living is the staple of everyday life for thousands of citizens, skilled or unskilled, formally well educated or otherwise, as much coveted well paid “middle class” career jobs are at a premium globally.

In this context, and bearing in mind the forum for this discussion, a special issue on the financing of education and lifelong learning in general, I explore signposts for an alternative approach to education and cultural work, constantly bearing in mind the Millennium Development Goals which though difficult to realise by the established deadline remain important points of reference when critiquing current policies in a variety of aspects of life, especially health and education. In this article, I draw on what is commonly referred to, in educational parlance, as critical pedagogy which draws inspiration from Freire and a host of other writers and movements. While the people involved demonstrate a variety of approaches, one common element is that they underscore the *political* basis of education. Education is not a neutral enterprise and heuristically can be regarded

as serving either to “domesticate” and strengthen the status quo and therefore keep in place much of the frequently perceived ills, economic, social and environmental, or else “liberate” in the sense of contributing to the ushering in of a new world in which principles of social justice and ecological sustainability are held uppermost. We associate this thinking with the work of Paulo Freire, though he is not the only one who thought, wrote and worked along these lines. One major exponent of critical pedagogy, Peter McLaren defines critical pedagogy as “fundamentally concerned with the centrality of politics and power in our understanding of ” education and learning.(McLaren, 1994, p. 167)

MARKET IDEOLOGY

This approach, as part of a more critical approach to education, strikes me as serving as an antidote to much of the Neoliberal policy discourse that has dominated thinking over the last thirty years or so and which has been the object of critique in most recent literature in critical pedagogy. We have been swamped by policies and formulations about education strongly connected with the market ideology, referred to as Neoliberal. Education is seen as a consumption rather than a public good with responsibility for learning being placed on the individual. The Chilean experience represents the most extreme form of this approach where even state was conceived of this way by the perpetrators of a most bloody dictatorship following the 1973 coup. It remains to be seen whether the changes augured by those struggling for more jobs and greater democratic spaces in the Arab world will represent a departure from this kind of approach which was prevalent in places like Egypt during the Mubarak period, even though jobs for the majority of Arab youth and other people were and remain “thin on the ground.”

THE INTEGRAL STATE AND EDUCATION

In this regard, one cannot separate discussions concerning education from

discussions concerning the state. There has been a whole debate concerning the role of education and the state. Educational sociologist, Roger Dale analyses the immensely complex relationships occurring between capitalism, state, and education. Drawing on Claus Offe, he analyses the process whereby education is linked to both capitalism’s legitimation function, by persuading us that inequality is not endemic to the system but a consequence of our different “abilities”, and to the production of necessary “human capital” for national and global economic ends. Dale argues that the ways those tensions are felt and addressed through education are central to our understanding and experience of the world. In this regard, reference should be made to Peter Thomas’ (2011) highlighting of Gramsci’s notion of the “integral state.” This entails a comprehensive view of the State’s role in the consolidation and the provision of a context for the consolidation or contestation of hegemonic relations. The separation of political and civil society, the latter used by Gramsci in a manner that differs from the way it is used today as a third sector between the state and industry, is done specifically for heuristic purposes. The state embodies both, as Thomas underlines. Equally heuristic, in my view, is the separation between the ideological and repressive as the two cannot be entirely separated unless in terms of degree. Institutions have both their repressive and ideological sides and this applies to the health sector, religion, education and other areas.

HEGEMONY

Hegemony is the means whereby social forces, manifest throughout not only civil society but also what is conceived of as political society (the division is heuristic), are, as Thomas notes, transformed into political power within the context of different class projects. I would also add to this conceptualization the view, mentioned by Thomas and certainly by Gramsci, following Marx, that the integral state has a strong relational dimension. For instance, critical educators write about

the need for new democratic kinds of social relations in production (inspired by Gramsci here), the public sphere (see for instance the Participatory Budget experiments in Porto Alegre and elsewhere where citizens are called on to discuss optimum and equitable use of municipal funds including funds for education), education and other aspects of social and economic life. These “prefigure”, to use a verb adopted by the late Paula Allman, a new form of state, through its more democratized horizontal social relations of production. This prevents us from reifying the state as a “thing”, from engaging in “thingification” as Phil Corrigan (1990) would put it. The question of the state comprising a set of social relations is also manifest in Gramsci’s conceptualization of every relationship of hegemony being a pedagogical relationship.

The importance of this theorization for those who believe in a politically engaged education, for the gradual ushering in of a different world, cannot be missed. It is perhaps for this reason that Gramsci has had such a considerable influence on critical pedagogy, as the works of authors such as Paula Allman, Jean Anyon, Michael Apple, Antonia Darder, Henry Giroux, Deb J Hill, Margaret Ledwith, Peter McLaren and David W. Livingstone so clearly indicate. What emerges from Thomas’s careful exposition is the notion, emphasized by Gramsci, that different historical formations are at different levels in terms of their development of civil society. These formations differ in the quality of the relationship between state and civil society. This applies to East and West and North and South. As Thomas rightly notes, there are social formations in the west, including the most western of the west (e.g the USA in Gramsci’s time), which are bereft of many institutions of civil society. (Gramsci, 1975)

„Education upholds the hegemonic apparatus.“

Sam B.



“Tent City University” over the tents of protesters of Occupy London. The improvised temporary university offered guest lectures to activists and passers-by alike. Some academics lauded Tent University as a more intellectually stimulating environment than their home universities after their visit.

HEGEMONY AND EDUCATION

The hegemonic apparatuses need to be built and consolidated to become the channels of the ruling class’s life-world (*lebenswelt*). The implications for educational activity are enormous. Education is viewed in the broadest sense, the way Gramsci viewed it, seeing it as central and integral to the workings of hegemony itself, and the way many critical pedagogues view it. Notable here is Henry Giroux, very much inspired by Gramsci, who developed the notion of “public pedagogy”. Education plays an important role as a hegemonic apparatus. This insight should allow us to view theories and philosophies in terms of their being institutionally embedded, serving as a hegemonic apparatus and being integrated in and therefore being ideologically over-determined by the integral state. Educators, seeking to highlight the politics of education, can draw on this insight. They can engage in uncovering ways by which dominant educational philosophies serve as hegemonic apparatuses for the “integral state.”

HEGEMONY AND LIFELONG LEARNING

In these times, for instance, this concept would enable educators to expose the dominant philosophies of lifelong learning closely connected with the hegemonic notions of “responsibilisation” and “employability” as linked to the neoliberal integrated state and its relations with, for instance, the supranational state that is the EU. Many of the claims made in relation to the fallacy of lifelong learning, distorted with respect to its original concept as “lifelong education” as propounded by UNESCO, would seem hollow. There is an over-emphasis on work, employability and ICT. All this indicates that the discourse thus far is removed from a broad conception of education that takes on board the individuals’ different multiple subjectivities. It still gravitates around the notion of a knowledge economy which, as certain research from Canada shows, is not the reality people are made to believe it is (Lavoie and Roy, 1998; Livingstone, 2004). It might not lead to the level of employment and financial rewards being anticipated given the global competition for

the few high paying middle class jobs available (Brown, Lauder & Ashton, 2010).

This discourse also limits human beings to two dimensional persons, consumers and producers, rather than expands the conception to embrace a more holistic view of persons who have the skills to engage critically and collectively not only *in* but also *with* the work process and also engage in the public sphere, that domain of democratic practice which critical pedagogues such as Giroux, perhaps inspired by Dewey and Habermas, have been writing about for years (Giroux, 2005). This would entail a notion of citizenship that can be called “really and critical active citizenship,” embracing the “collective” (in the sense of people working and acting together, complementing each other), rather than the notion of the atomised individual citizen that is often promoted by the dominant discourses surrounding citizenship. I am here referring to the idea of atomised individuals who facilitate *governmentality*, in Foucault’s sense of the term. Governmentality refers to the state’s production of citizen behaviour according to its policies, fostering mindsets and practices that allow subjects to be governed “at a distance” (English & Mayo, 2012). Many of the issues being faced throughout society call for coordinated collective actions involving both ICT and the streets and squares, (as the numerous demonstrations in Greece and other parts of Europe, as well as many parts of the Arab world, have shown), albeit not necessarily attaining the desired outcomes. The struggle remains an ongoing one, as I have emphasised time and time again. They are also public, and not simply individual, issues that entail social responsibilities.

As the literature on this kind of action has shown, such an ongoing social engagement entails constant learning and relearning, pointing to a notion of lifelong learning that, as expounded on by a number of writers from a critical perspective (Williamson, 1998; Wain, 2004), constitutes a refreshing alternative to the one that prevails in the dominant discourse. It is a type of lifelong

learning that has been occurring for years but which has not always been recognised as such. It is one which is inextricably intertwined with ongoing popular struggles for the creation, safeguarding and enhancing of democratic spaces in which men and women live as social actors. This is all part of the process of renegotiating the apparatus of hegemony.

SOLIDARITY

Furthermore, we require a critical pedagogical approach to education that takes as its point of departure a new and more pressing notion of solidarity, one which cuts across class, gender and racial lines. It should be an education or kind of political activity that focuses squarely on not different identities in total isolation from each other in a process of segmentation but on the totalising structural force of capital, the “universe of capital” if you will. This is what the thousands who have been taking to the streets in various cities of Europe and the USA as well as beyond seem to be gesturing towards and I use “gesturing” since we need to adopt a tentative and groping approach to our analysis of events here. Yes there was racism, sexism and many other isms before the inception of capitalism but here we have a totalising structuring force that is predicated on segmentation on social class, gender and racial lines. At the heart of this approach, there should be an anti-racist education which does not sanitize the unequal and violent, physical and symbolic, relations that exist and are promoted by an ever globalizing and criminalizing capitalist system. On the contrary it should be one that induces human solidarity, avoiding misplaced assumptions and alliances. It would seek, through problem posing, to unveil the fact that both the so-called and often self-styled autochthonous working class and the immigrants share a common fate: that of being oppressed and subaltern. Both are victims of a ruthless process of capitalist exploitation.

HIGHER EDUCATION

One other point concerns higher education, an important sector of lifelong

learning in these and other times. This area is under vicious attack by those taking advantage of structures which require renovation and perhaps a wider purpose in society. Rather than being widened to render the university and institutions of higher education more responsive to the democratic needs of society, the discourse is being reduced to one regarding another form of business governed by the principles of the market. And yet one would expect universities to serve much wider causes than those of the economy and employment. They can well provide, and happily some indeed do provide, against all odds, responses to some interesting innovations, in different pockets throughout society, with respect to different forms of production. These entail different and more horizontal relations of producing, as well as the identification of alternatives to what is being produced. To the contrary, however, these institutions are exposed to a discourse that is divisive in its encouragement of diversification in terms of research, teaching and regionally responsive universities, with ramifications for the Ancient Greek notion of *praxis* (reflection upon action for improved action, involving the codification of such reflection into theory).

There is the danger that teaching is to be separated from research. And *praxis* is a central concept in critical pedagogy based on the old Socratic maxim, reproduced by Plato in the *Apologia*, that an unexamined life is a life not worth living. Quite laudable in this regard are initiatives such as that of Lincoln or “Tent City University”, UK (an activist-founded ad hoc-university with guest lecturers, housed in temporary tents in London), the latter being part of “Occupy London” (see Stanistreet, 2012). Activities such as these revive in some way the old notion of independent working class education, a kind of university education rendered

“Teaching separated from research is dangerous.”

gratis to the popular classes with certification endorsed internationally by a number of academics, even if dismissed by the relevant state apparatuses. This alternative university education is based on the principles of critical pedagogy where knowledge is shared not for instrumental reasons (i.e. for work) but for the social end of helping in the formation of politically engaged social actors.

One hopes that the scope of knowledge focused upon, as a result of epistemological curiosity, is broad enough to incorporate insights derived from South and North, East and West. It would be a body of knowledge that foregrounds subaltern views, including the best from feminisms, critical racism theory, independent working class education, indigenous knowledge, environmental studies and social movements' learning (including subaltern social movements' learning). This would constitute the grist for a critically engaged pedagogy serving as an alternative to that of the mainstream one that favours technical rationality.

This article draws from the author's forthcoming book, Politics of Indignation (Mayo, 2012).

REFERENCES

- Brown, P, Lauder, H and Ashton, D (2010). *The Global Auction. The Broken Promises of Education, Jobs and Incomes*, New York: Oxford University Press.
- Corrigan, P (1990) *Human Forms/ Social Capacities. Essays on Authority and Difference*, New York and London: Routledge.
- English, L and Mayo, P (2012), *Learning with Adults. A Critical Pedagogical Introduction*, Rotterdam and Taipei: Sense publishers.
- Giroux, H (2005) *Schooling and the Struggle for Public Life: Critical Pedagogy in the Modern Age* (second updated edition), Boulder: Paradigm.
- Gramsci, A (1975) *Quaderni del Carcere* (Valentino Gerratana ed.), 1975, 4 Volumes, Turin: Einaudi.
- Lavoie, M. and Roy, R, (1998) *Employment in the knowledge-based economy: A growth accounting exercise for Canada*, Ottawa: Applied Research Branch, Human Resources

- Development Canada.
- Livingstone, D.W (2004) The learning society: Past, present and future views (R.W. B. Jackson Lecture, 2004). OISE/University of Toronto, October 14. Available at www.wallnetwork.ca (website of the Research Network on the Changing Nature of Work and Lifelong Learning –WALL, OISE/UT).
- McLaren, P (1994) *Life in schools. An introduction to critical pedagogy in the foundations of education*. New York & London: Longman.
- Mayo, P (2012), *Politics of Indignation. Imperialism, Postcolonial Disruptions and Social Change*, Winchester and Washington: Zer0 Books/John Hunt publishers.
- Stanistreet, P (2012) 'Anyone can teach. Everyone can Learn' in *Adults Learning*, Spring, pp. 20-26
- Thomas, P. D (2011) in *The Gramscian Moment. Philosophy, Hegemony and Marxism*, Chicago, IL: Haymarket Books.
- Wain, K (2004), *The Learning Society in a Postmodern World. The Education Crisis*, New York and Frankfurt: Peter Lang.
- Williamson, W (1998), *Lifeworlds and learning. Essays in the theory, philosophy and practice of Lifelong Learning*, Leicester: NIACE.



PETER MAYO

Peter Mayo is Professor and Head of the Department of Education Studies, Faculty of Education, University of Malta, Malta. He is also a member of the 'Collegio docenti' for the research doctoral programme in Educational Sciences and Continuing Education at the Università degli Studi di Verona. He teaches in the areas of sociology of education and adult continuing education, as well as in comparative and international education and sociology in general. Among his major contributions is a comparative analysis of Paulo Freire's and Antonio Gramsci's educational thinking.

CONTACT

Professor Peter Mayo
Education Studies
Faculty of Education
Room 228
Old Humanities Building (OH)
University of Malta
Tel: +356 2340 2937
Email: peter.mayo@um.edu.mt

Small grants projects – The formula to discover oneself

“I could discover myself. I realized that I am able to do things. I no more complain about what to do. I decided to start doing something.”

Such an evaluation from a student is a motivating compliment for an educator. These are the words of participants in small grants community development projects in Georgia. This case study article shows vividly how small grants projects are an effective adult education instrument. Community members’ active participation in the project allows them to develop a number of their competences – most importantly a sense of initiative and entrepreneurship. Project’s are not just a means to an end. They can be educational tools in their own right, as a comparison between a project management cycle and David Kolb’s adult learning cycle demonstrate. Financing for the Georgian projects described here stem from local NGOs and European development projects. State funding is scarce but paradoxically this allows for freedom from strict regulations for those NGOs that manage to secure funding.

Pavle Tvaliashvili

INTRODUCTION

Adult education in Georgia is not a new phenomenon. Before the 1920s it even developed according to a European model.

In the 20 years following the collapse of the Soviet Union, the system of adult education changed substantially in Georgia. Old organizational structures, models of funding and objectives characteristic to Soviet adult education have gradually disappeared whereas completely new ones have gradually emerged in their place, at times even spontaneously. Adult education in the beginning of Soviet times was characterised by wiping out mass illiteracy and innumeracy. On certain occasions this education was even forceful. Later on, life-long professional education was considered as adult education which, on the one hand, implied continuous raising of qualification mainly within one profession (vocational technical institutions, courses to raise qualification, working with the masters) and, on the other, ideologized political education of the masses.

In the present day new funding models and structures need to be adequate to a new era and offer educational services that will be adapted to the requirements and needs of local target groups.

Georgia, suffering from a civil war and a transition period, has found itself facing big challenges. Adult education is entrusted with new tasks in this transition period, although the state itself has not expressed this directly. These new tasks have ushered in new priorities relating to civil society, in addition to the traditional lifelong professional education. The new actors responding to the new tasks of building civil society in this new environment are small commercial consultancy organizations, training providers and non-governmental organizations (NGO's) which in a number of cases provide educational programs through the funding of grants or state vouchers and often by means of funding from the service beneficiary itself. Some of the NGO's also rely on the help of the international community and donors.



Ann Schiff

The Svaneti area in the Caucasus mountains is inhabited by the Svans, a subgroup of Georgians, with their own language and customs. Some of the region's villages boast historical monuments included in the UNESCO World Heritage Sites. Pictured is the Ushguli community of villages.

NEW PRIORITIES OF ADULT EDUCATION IN POST-CONFLICT GEORGIA

1. Adult education has a function for adapting the working force to the new labour market environment: computer courses, entrepreneurship and small business courses, state language learning courses for ethnic minorities, etc.
2. Adult civic education is offered on sustainable development, civilian peace and integration, conflict prevention and peaceful resolution, encouraging active citizenship, with such topics as democracy, tolerance, inter-ethnic relations, active citizenship, gender, environmental protection, healthy lifestyles, etc.
3. Structural changes have led to an increased demand for short-term programs in adult professional training in the national economy. Private providers of education as well as public providers of professional education and Ministries of Education and Economic Development are trying to satisfy this demand.
4. Finally, employers need adult education which raises the qualifications of their employees and involves them in continuous education. Some employers

educational service providers whereas others have their own training centers (e.g. Procreditbank, TBC Bank, Teachers' House of the Ministry of Education).

A policy of adult education takes form

Past years have witnessed certain steps on the way to forming a policy of adult education. *The strategy of vocational education development* is worth noting in this respect. It states that it takes into consideration the principles of the EU memorandum "Lifelong Learning", supports development of formal as well as informal education, including, creating mechanisms of recognition for adults. These reforms of the educational sphere have led to the fact that vocational education in our country is now open for people of any age.

Currently the state is not able to fund non-formal education by means

„Vocational education is now open to all ages.“

of public funding. However, the fact that there are no strict rules and regulations which would limit the activities of non-formal education providers can be considered an incentive and boost of this sphere.

ADULT EDUCATION FOR COMMUNITY DEVELOPMENT

We now move to discussing the two “directions” an NGO takes as the typical educational service provider.

What is a project?: A project is a series of activities aimed at bringing about clearly specified objectives within a defined time-period and with a defined budget. (European Commission, 2004)

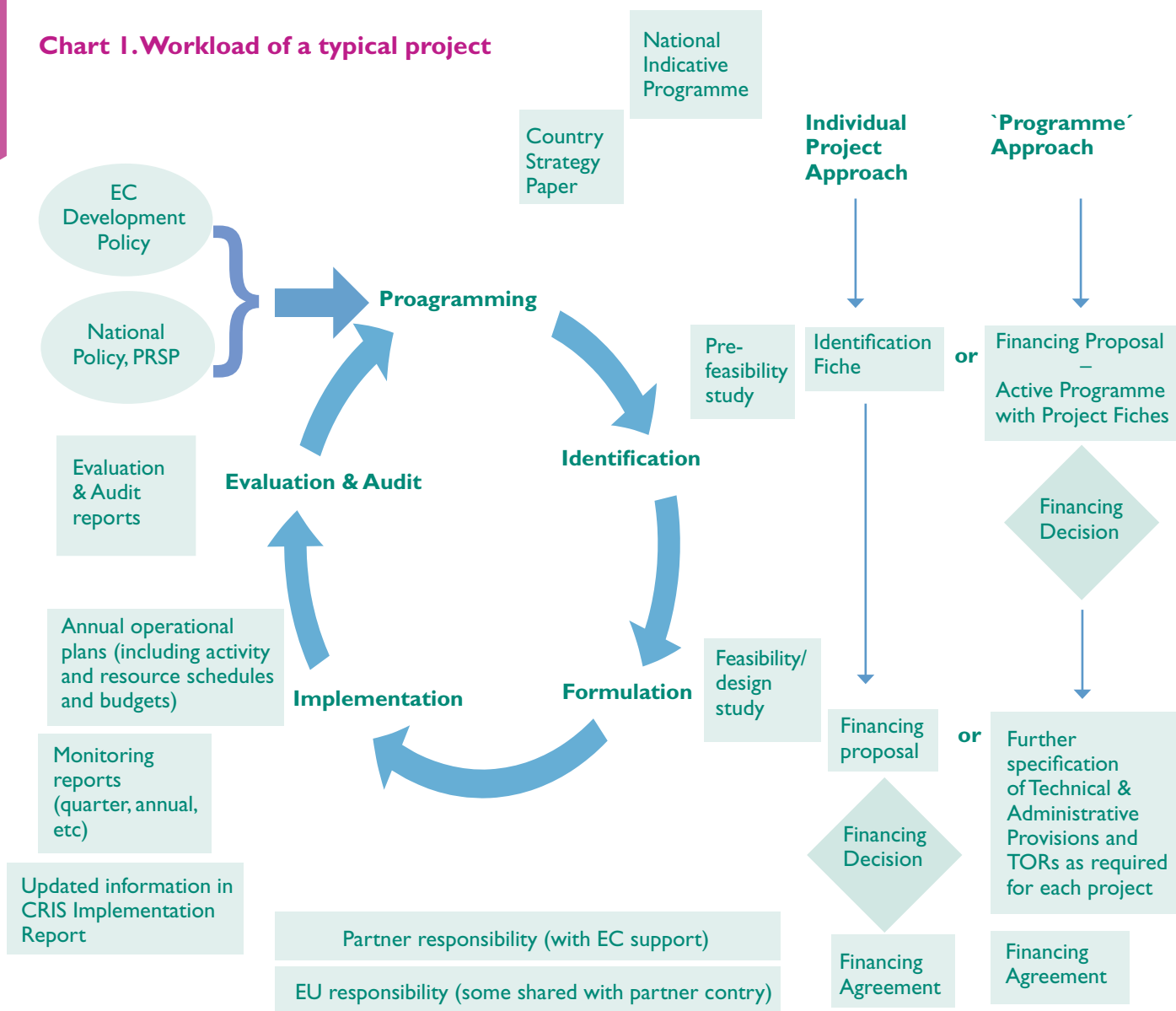
A project is defined in terms of a hierarchy of objectives (inputs, activities, results, purpose and overall objective) plus a set of defined assumptions and a framework for monitoring and evaluating project achievements (indicators and sources of verification).

1. Direction: Various international and local organizations carry out community development projects and, with this view, one of their objectives is to develop community mobilization local capacity. Often in these kinds of projects community leaders are identified and then trained to whatever desired end. In these cases, NGO's are service providing entities which help an implementing organization (community-

based organizations, initiative groups, small local NGO's) by providing trainings. One example of this is the program of CTC (a Georgian non-governmental organization - Center for Training and Consultancy) to prepare community leaders. CTC's community development encompasses multi-level trainings, effective communication, community participatory leadership and project management.

2. Direction: We use this classification when an NGO carries out a development project itself in a specific community and at the same time cooperates with partner organizations which possess certain experience in various areas in the issues of community development.

Chart I. Workload of a typical project



Georgian Association of Educational Initiatives (SIQA) and Center of Training and Consultancy (CTC) share the approach of using small grants projects (community projects) as the preferred tool of informal education. Implementation of this educational tool and making observations on it started in 1999 in the Georgian Association of Educational Initiatives for adolescents, whereas for adults it was initiated in 2006. Small grants projects are still much in use: a large-scale grant program is currently implemented in the Upper Svaneti region, in the Caucasus mountains in Northwestern Georgia. This particular project will be the focus of the case study of this contribution.

In informal talks with Georgian and international organizations it has been numerously noted that active or even passive involvement of adult citizens in any community project boosts the participant's professional and personal competences.

This process differs from "normal" formal and non-formal education. In this specific project described in this article we will see how participants develop key competencies (communication in mother tongue; communication in foreign languages; mathematical competence and basic competences in science and technology; digital competence; social and civic competences; cultural awareness and expression; learning to learn, i.e. study skills). In the case study presented next we will however single out a particularly important competency developed by these small grants community projects: entrepreneurship competency (sense of initiative and entrepreneurship).

ANATOMY OF A COMMUNITY PROJECT

What is a "developed community"? How do we, as community developers, define this?

Built warehouses, water or gas supply, renovated bridge, special space for rubbish... This is a limited list of things that can be observed within the community at the certain stage of development. However, according to any existing situation, it is difficult to define whether the community is indeed developed.

“There is little research on the impact of adult education on inclusion.”

The author of this article participated in the activities of the coalition of organizations operating in Georgia in respect with community development. The following main traits of the developed community have been identified at meetings:

- There is a civil group within the community
- There is a vision within the community which is focused on development and innovation and it knows what direction to take
- The community is aware of its needs and rights and advocates them
- The community is able to define problems and reacts to them.

In the period of observations from 2006, CTC supported establishment of small initiative groups within various communities in Svaneti. It was necessary to motivate such groups so that group members could care about community development and, therefore, self-development in an informal way. With the view of raising motivation, several strategies were used: trainings, consultations (this approach is used in other countries as well by NGOs and organizations of international development), as well as small grants projects. Development projects are a way of clearly defining and managing investments and change processes (European Commission, 2004). Development projects can vary significantly in their objectives, scope and scale. Smaller projects might involve modest financial resources and last only a few months, whereas a large project might involve many millions of Euros and last for many years.

A wide range of documents need to be prepared and an immense amount of work is required to be carried out while managing the complicated project cycle. See Chart 1 on the previous page (European Commission, 2004, p.19)

Implementation of a small-scale budget community projects on the other hand seems to be quite easy.

Carrying out community projects following the scheme below is focused on getting beneficiary benefit: *Problem identification-> setting the goal->gaining financial support->carrying out activities -> attaining results (solved problem).*

Involving community members in the development project

Small grants projects have been funded since 2006 by CTC in communities of Upper Svaneti under the long term program supported by the German organization EED (Church Development Service). The following stages were included in the program:

- Informing the target community of the development project (bulletins, individual meetings, group meetings)
- Open door day by project organizers for community members
- Trainings on "Developing project ideas and filling in the project application form"
- Recruiting project working groups (minimum 5 persons in the working group came from the community)
- Competition for development ideas. Ideas were created by community members themselves (working group) and entered in the project application form. An independent jury selected project submissions for approval
- Participation of 2-3 person representative groups of approved projects in financial and content management trainings
- Study tour
- Processing final versions of projects and signing the contract
- Project implementation
- Monitoring and consultations
- Self-appraisal and evaluation.

Co-participation of the community in the process led to the creation of an initiative group within the community. Consequently, a sense of initiative and entrepreneurship emerged within the neighborhood. These became the people who implemented small projects (budget from 250 – until 4500 Euro).

At the first stage the community cen-

tre established by CTC started to provide services to various groups of citizens with the view of developing a sense of trust among them. Services provided included computer and English language courses, free internet access, various trainings and seminars.

In case of computer and English language courses, centre employees had to answer several questions, such as: how will the process of courses be managed and monitored? How will trainees be selected? What will trainees study specifically? What will the gained knowledge be used for? How to maintain good relations with those people who were upset by not “recruited” to the group? What needs to be done to avoid such a situation?

Sometimes it was difficult even for the trainees themselves to reply to these above-mentioned questions. After long talks it was possible to come up with answers, which increased motivation and further efficiency of the training process. Employees of the resource center could manage to establish communication with community members through the course of numerous meetings. As a result, courses were implemented successfully.

In the process of operation, CTC was trying to meet the following criteria: to bear the vision within the community and make it focused on development and innovation.

We often consider 3-5 years of working within the community a lot of time. Experience has shown that it is quite possible that a lot more time is necessary to meet the criteria mentioned above. It took the community center 3-4 years to create a positive atmosphere among community members. According to the theory of the ladder of involvement, which analyses levels of those co-participating in the community, it can be said that after working in the community for 5 years, their members now show interest and come to meetings with a clear vision. Thousands of visits have been registered in the centre with the aim to join various training courses and use computer and internet services. Citizens periodically attend discussions and information meetings. However, the potential index

of such people is still low in comparison with the overall amount (10-15 active individuals in the settlement whereas the amount of population equals 3000 and those in the community of Mestia amount up to 15 000).

Demonstrating examples of existing developed communities to the community representatives positively affects problem identification. Study tours conducted by CTC in community and non-commercial training centers of other regions of Georgia let the Svaneti community members (youngsters and adolescents) know what a better situation can be like compared to what they have in their home neighborhood. In the process of implementing small projects community members were actively using the knowledge and experience gained.

After the identification of problems and the situation, the following questions used to arise: Does the community possess sufficient resources in order to take care of the problem? The small project of cleaning the own yards at one community was the example of evaluating resources wrongly. This project was not supported during the internal CTC competition since community members were able to clean the yards without the help of outer resources. The fact that the community requires small support from the outside is exemplified by fencing the territory of sour waters (mineral spring) on the territory of a school in Mestia with cement embankment with the view of protecting it from livestock for which only cement was purchased. Pebbles, sand, tools and the workforce were found within the community.

Up to 30 small and medium size projects have been implemented to date within the community with the support of CTC. Full involvement of community members in project cycle management led to making serious steps towards a developed community. Reports made by each team showed that participation in projects supported development of key competencies out of which the most outstanding one is that of entrepreneurship. By taking part in the development community projects, community members develop

a sense of initiative, rather than just being developed “from the outside”.

PROJECTS AS A NEW EDUCATIONAL TOOL

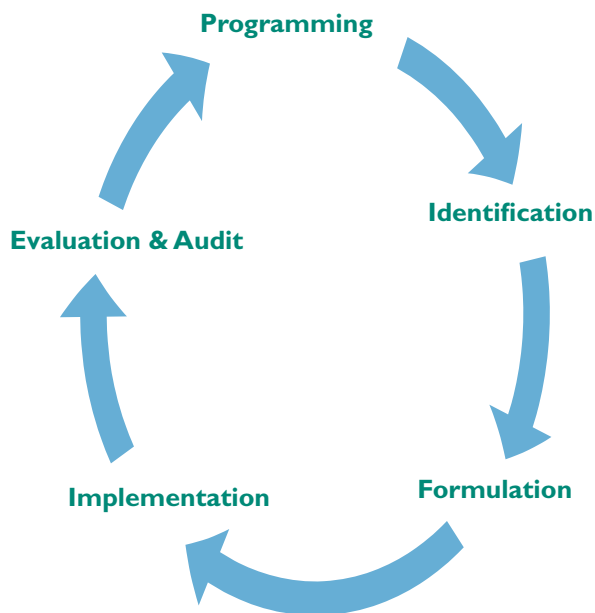
Similar projects were carried out elsewhere in Georgia, carried out by local NGO's such as Elkana, Centre for Strategic Research (CSRDG), AEAG, etc. Adult education organizations existing in Georgia offer the following services: trainings, courses, interest groups, consultancy.

According to a small poll made by the authors of this article within member organizations of the Adult Education Association of Georgia (NGO's, University, profit organizations...), 38 polled members all offer trainings, seminars, courses and implement projects. However, none of them mentioned (except AEAG, CTC and SIQA) that “projects” are used as *the educational tool*. It was mentioned in the interviews that managing of projects is a usual (informal) education process. However, formalization of this process is now possible which is demonstrated by the experience of AEAG, CTC and SIQA.

The sense of initiative and entrepreneurship is the ability to turn ideas into action. It involves creativity, innovation and risk-taking, as well as the ability to plan and manage projects in order to achieve objectives. The individual is aware of the context of his/her work and is able to seize opportunities that arise. It is the foundation for acquiring more specific skills and knowledge needed by those establishing or contributing to social or commercial activity. This should include awareness of ethical values and promote good governance.

This is the competence which is so necessary these days for people in order to find employment, be self-realised and develop. The sense of initiative and entrepreneurship develop in the process of every project management cycle since at every stage of the cycle the management group requires analysis, synthesis, evaluation and creativity (Clark, 2010). Each of these develops in the process of project cycle management since at every stage of the cycle

Figure 1. EU Project Cycle Management Guidelines



the management group requires analysis, synthesis, evaluation and creativity. According to Bloom's taxonomy these are the highest levels of thinking.

Furthermore, if we look at the EU's recommended Project Cycle Management Guidelines (European Commission, 2004) (Figure 1), we see a conformity with David Kolb's experiential learning cycle (Kolb, 1984) (Figure 2) and adult learning principles as formulated by Wegener, listed below.

According to Kolb's model there are

four consecutive stages to adult learning (CHRM, 2012):

- Concrete Experience
- Reflective Observation
- Abstract Conceptualization
- Active Experimentation

In the project management cycle, the *programming and identification* phases may correspond to the *concrete experience* phase in the learning cycle. Identification and *formulation* requires *abstract conceptualization*. *Implementation* is a phase of *active experientia-*

tion, feeding back to reflection on the new concrete experience phase.

Wegener, on his part, lists adult learning principles as follows (Wegener, n.d.):

- Adult learning is unique to each individual. Everyone learns at their own pace and in their own way
- Adults value their own experience and don't want to be treated as stupid or ignorant
- Learning is voluntary. Adults only learn what they want to learn and do what they want to do. What they learn must have personal meaning and be of direct or immediate value
- The best learning is based on experience
- Most adults like to work with others. Aim for a cooperative process that supports sharing of experiences.

In sum, the following three domains are present in learning situations:

1. **Cognitive domain** (intellectual capability, ie., **knowledge**, or 'think')
2. **Affective domain** (feelings, emotions and behaviour, ie., **attitude**, or 'feel')

3. **Psychomotor domain** (manual and physical skills, ie., **skills**, or 'do')

Participation in community projects develops these three domains:

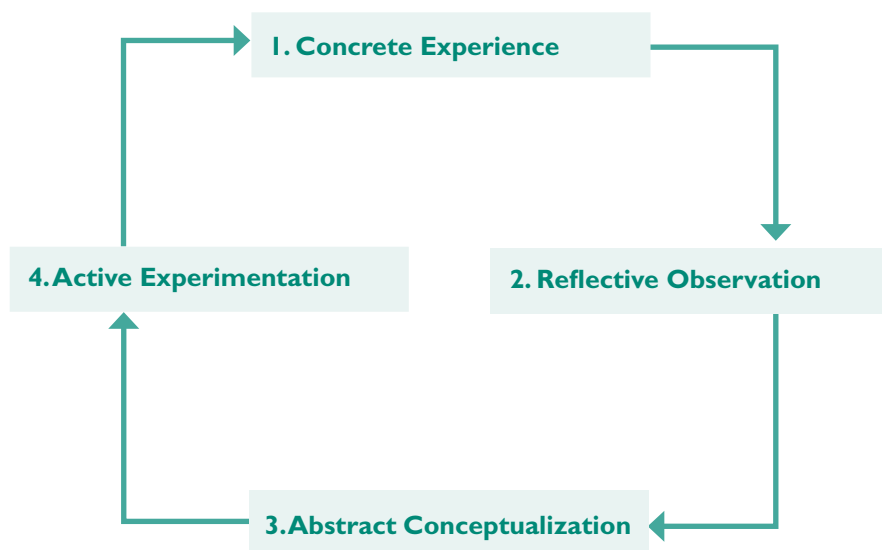
We can also easily see how participation in various projects develops management team members' Multiple Intelligences, as formulated by Howard Gardner, step by step: Linguistic, Logical-Mathematical, Spatial-Visual, Interpersonal and Intrapersonal (Businessballs, n.d.).

In sum, we can advise NGOs, international institutions and educational establishments to use small grants projects as an adult education instrument since in this process a number of key competencies are developed, especially the ones clearly identified in this article - a sense of initiative and entrepreneurship.

This is exemplified by these comments below, from community members- turned-development agents.

„Initially, it was quite difficult for me to formulate even the project idea whereas now I can make decisions independently“.

Figure 2. Kolb's experiential learning cycle



"We started our own business, established the organization and are going to implement a lot of projects"

"... I could better realize that I can do much more."

REFERENCES

- Businessballs (n.d.). *Howard Gardner's multiple intelligences*. Retrieved from <http://www.businessballs.com/howardgardnermultipleintelligences.htm>
- CHRM (2012). *Kolb's Learning Style Inventory and Kolb's Learning Cycle*. Retrieved from <http://www.chrmglobal.com/Articles/231/1/Kolb%27s-Learning-Style-Inventory-and-Kolb%27s-Learning-Cycle.html>
- Civil Society Organizations in Georgia – Dynamics and Trends of Development*. (2010). Retrieved from http://www.csr.dg.ge/index.php?module=publications&page=details&grant_id=9&cid=91&lang=eng
- Clark, D. R (2010). *Bloom's Taxonomy of Learning Domains; The Three Types of Learning*. Retrieved from <http://www.nwlink.com/~donclark/hrd/bloom.html>
- CTC. (2011). *Annual Report*. Tbilisi.
- European Commission (2004). *Project Cycle Management Guidelines*. p.8. Retrieved from http://ec.europa.eu/europeaid/multimedia/publications/publications/manuals-tools/t101_en.htm
- Wegener, P. (n.d.). *Principles of Adult Education*. Retrieved from http://www.kyeemafoundation.org/content/userFiles/file/extension/Adult_education.pdf

ACKNOWLEDGEMENTS

Special thanks to Tea Gulua (executive director of AEAG – Adult Education Association of Georgia) and Lela Abdushelishvili (board member of AEAG) for support in writing this article.



PAVLE TVALIASHVILI

Pavle Tvaliashvili is a PhD student of Ilia State University, Georgia. Pavle is the founder and head of the SIQA - Georgian Association for Educational Initiatives since 1999. He has also worked as Project coordinator of the Upper Svaneti Development Project of CTC since 2006. In 2011 he was elected as the Head of the Board of the Georgian Adult Education Association. Pavle is the author of several educational projects and represents various international educational programs and organizations in Georgia.

CONTACT

Pavle Tvaliashvili

Email: pavle_tvaliashvili@iliauni.edu.ge

Pinching the euro

The economic crisis is cutting deep into the resources for adult education across Europe. LLinE talked to four adult education professionals in different fields to find out if and how the recession is affecting their daily work.

University lecturers and students suffer alike

Antonio Fragoso

Doctor of Pedagogy, Higher School of Education (ESE)
University of Algarve
Faro, Portugal

LLinE: What kind of work do you do?

Antonio Fragoso: My work includes four main areas: I lecture between 10 to 12 hours a week and carry out research. Academic management takes up a part of my time as does tending to community relations.

How does your organization fund its activities?

In Portugal, a substantial part of higher education funding comes from the state budget. Right now 67% of our expenses are covered by the state. The remainder comes from university revenue creation: research

and services to community institutions, enterprises, and so on.

What factors affect the economic situation of your organization right now?

State funding is constantly decreasing. The International Monetary Fund (IMF), the Council of Europe Development Bank (CEB) and the



Antonio Fragoso's personal archive

Antonio Fragoso is worried about the financial woes of his students.

Portuguese Government have imposed new management and financial accounting rules. As a result, for example, managing research projects is now very hard. All direct and indirect taxes have also been increased, thus making the economic situation of higher education even more difficult. Also, remember that the situation of many ordinary Portuguese is difficult. Unemployment is high and many are impoverished. This has consequences for university students.

Does the European economic crisis affect your work?

In the last year the state budget for higher education was cut 8,5%. A new cut is expected next year, possibly 6%. In the last years many of my colleagues are becoming redundant, with many more losing their jobs this year and the next. Those of us lucky enough to keep our jobs had a 7% cut in our salary, and we are getting paid 48 of the 52 weeks of the year. Our teaching hours are

increasing and our ability to build teams for research or other purposes is now dangerously reduced.

Generally speaking, all university expenses are strictly controlled. National resources for research programmes are scarce.

Finally, the economic crisis has had terrible effects on families through unemployment. Dropping out from education is increasing, and more and more students need university social support of all kinds. Some even need meals from the university.

Mirjana Milanović's personal archive



Mirjana Milanović is hoping for the first law of adult education in Serbia to be implemented.

Austerity foils reforms at Serbian Ministry

Mirjana Milanović

Head of Unit for Adult Education in the Ministry of Education and Science Belgrad, Serbia

LLinE: What do you do in the Ministry?

Mirjana Milanović: I am the chief of a Group in charge of secondary education. Our focus areas include preparation of laws in adult education and lifelong learning and planning, monitoring and developing professional development of adults. We also prepare standards for adult education and cooperate with local communities and social partners in monitoring implementation and development of adult education and lifelong learning.

What are the main challenges for adult education in the country?

Firstly, we have people suffering from poverty. Furthermore, demographically speaking, the population is ageing.

There is a high unemployment rate predominantly within the youngest age group (15–25). Their educational structure is unfavorable. Only some 38% of the unemployed have qualifications. We have a large number of unemployed people who

have completed secondary level education (the EQF level -IV), and they cannot find work. On the other hand the demand by employers is largest for this level of employee education but still employers are looking for employees with a new profile and different competencies. Therefore it is necessary to retrain people for labour market demands.

There are also problems within the adult education system itself. Funding is shaky, research is scarce, there is some lack of quality control in provision, and providers lack a systematic approach to education.

What is the situation of adult education financing?

Lack of financial resources is the main limiting factor for development of adult education. Education is funded both by the state and privately. The model of financing is not systematically determined, so we have a great disproportion in the allocation of funds for youth and adults. On the other hand, adult education benefits a bit more from the funding of private companies and international donor projects. Chambers of trade unions and other such bodies also organize trainings in vocational education, ICT, foreign languages, human rights and civic education.

From the state side, the Ministry is now investing in professional development of primary and secondary

school staff. Also, a new budget line for financing primary adult education was established. Additional funding of professional training is available for unemployed persons.

Does the European economic crisis affect your work?

The crisis has caused a decrease in the number of employees in public administration and the education system. This is also a reality in my department. Review programme study tours and study visits to other countries in Europe are also significantly reduced. Professional development and training time is limited, and funds for their implementation are cut.

On a country-wide scale, the economic situation is likely to impact the reform process of adult education. This reform initiated in 2006, when Serbia adopted a strategic document that defined further development of adult education in the country. This development included several large pilot projects testing different adult education mechanisms, concepts, standards, methodologies and curricula.

Our Ministry has also prepared the first law of adult education in Serbia. This proposal defines adult education as an integral part of the entire educational system and a manifestation of the concept of lifelong learning. The law would establish a bigger budget for adult education.



Gina Ebner: Financial situation of the EAEA is stable – for this year!

There is now the fear that implementation of these big improvements will be significantly slower, as funds are lacking.

Advocate anticipates leaner times

Gina Ebner

Secretary General
European Association for the Education of Adults (EAEA)
Brussels, Belgium

LLinE: Tell us about your work.

Gina Ebner: I am secretary general of the European Association for the Education of Adults (EAEA). We are an advocacy NGO for lifelong learning and umbrella organization for 127 national member organizations. I am responsible for the operational management as well as proposing EAEA policy to the Executive Board. Another important job is representing EAEA towards European decision-makers, whether it is in conferences or in personal meetings.

Where do you get your funding?

EAEA has three main sources of income: the membership fee, an operational grant from the Jean Monnet programme for European Associations and projects and subcontracts.



We are currently coordinating a Grundtvig network called Outreach Empowerment Diversity, which is an example for the third source.

How is the economic outlook in your organization?

Fortunately, our situation is stable – for this year! As far as I can tell, it will also be stable in 2013, as we have a 3-year framework contract for the operational grant and the projects will continue. This means that we are able to put a focus on policy and advocacy. We still have to spend quite a bit of time on fundraising in the form of, say, bid writing.

Having said that, it is also true that we always save on costs. The situation may be stable but that does not mean that we have money to spare!

We are indeed worried about the future from 2014 onwards. At the moment, the proposal for “Erasmus for All”, which will replace the Lifelong Learning Programme, does not foresee any operational grants for European associations. This would undermine the possibilities and opportunities of civil society in lifelong learning. We are currently lobbying to have operational grants in the future.

Folk high school lives from hand to mouth

Ville Marjomäki

Principal
Lahti Folk High School
Lahti, Finland

LLinE: What kind of organization are you leading?

Ville Marjomäki: Lahti Folk High School is a non-political, non-religious folk high school, owned by a private foundation. We offer mainly general or non-formal courses for “pre-college” students and adults: some 300 students study yearly on these courses. On top of that we have voluntary additional basic education, upper secondary school and vocational education and training. Like many other folk high schools and adult education centres we are also active in immigrant integration training: we run courses on Finnish language and culture for immigrants.

How is your economy currently?

State funding is a crucial part of our financing, although our students pay tuition fees. State support has been on the decrease pretty much for the past decade – and there is no end in sight. In terms of state funding, non-formal adult education is in the

Ville Marjomäki: Cuts are understandable but they must be well-planned and timed from the government side.

worst position compared to vocational adult education or comprehensive schooling. Still the education ministry seems to treat for example folk high schools as an extension of the school system, without realizing our special nature.

For example, we receive our state support retroactively, after the costs are realized. We finalized our yearly budget in last August. Then, in October, cuts amounting to eleven million euros were announced. This would have meant not receiving half of the budgeted money. This is simply bad governance! Luckily the government decided to compensate fully for these cuts in the following year.

We cannot always cut costs evenly across different strands of our activity – a little here, a little there... I am afraid of the situation where the savings start to affect our students: instruction hours per head will decrease and we are forced to raise tuition fees. This is detrimental to equality of education.

Storm clouds and silver linings?

What is the worst aspect of savings and austerity measures? What is the best?

ANTONIO FRAGOSO



If the present higher education policy persists, some Portuguese universities will have to shut their doors. These will be the peripheral universities in the country, which play the most important role socially.



A silver lining might be the need to re-think the whole university strategy to adapt to harsh times.

MIRJANA MILANOVIĆ



Lack of budget funds leads to a greater struggle for different funds, for example from donors or from the EU pre-accession funds for further development. Hence, improvement of the education system and its legislation is hindered.



Despite all difficulties, there is an increasing tendency to include adults in informal education, especially in education and learning programs offered by NGOs and private providers of education. The number and types of non-formal education providers has also risen. These new providers include open universities, training centers, consulting firms, correctional facilities, charities, museums, libraries, reading rooms and even artistic venues such as theaters, cinemas and galleries.

GINA EBNER



The negative consequences are felt by many of our member organizations: we have had requests to waive or reduce the membership fee and some organizations left or dissolved because of the crisis.



A positive consequence of the crisis is that we are currently discussing the re-definition of adult learning in times of crisis. At least on the EU level, education and training have been upgraded in importance. EAEA is currently discussing what this means for non-formal adult education and how to position ourselves.

VILLE MARJOMÄKI



Too much saving ends up hurting the student, who, in many cases, pays for his or her education.



This is difficult. Is there a good side to all of this?

Learning as spirituality and nurture – Pacific indigenous peoples’ perspective of lifelong learning

This paper discusses characteristics of an adult education practice for peoples in the Pacific. There is no one Pacific way as the Pacific population is diverse consisting of many cultures, languages, social structures and differing colonial experiences. For many Pacific peoples learning is holistic, is driven by cultural motivation, which is often for the benefit of their extended families (the collective) rather than personal gains or self-actualisation. Learning is constantly intervened by spiritual matters, the same being true for most aspects of Pacific peoples’ day-to-day lives. Therefore spirituality is integral to learning at all levels formal and informal.

Timote Vaioleti

INTRODUCTION

Many cultures value group-orientation (the collective). This influences ways of being, their thinking, teaching and learning. In fact, the two most populous countries in the world, China and India with over 2 billion people are influenced by various collectivist perspectives. Like other communities, Pacific nations and communities have developed cultures over thousands of years that have synergy with nature, their environment allowing for a symbiotic relationship of co-existence. With this cultural base, they have also developed educational tools that have facilitated the transition of their knowledge, formed over generations. This has allowed a certain holistic, sustainable and community longevity.

The Pacific is a vast area consisting of mainly ocean and is inhabited by a population classified into Polynesia, Melanesia and Micronesia. This paper will discuss cultural concepts that motivate Pacific Peoples to learn. In highlighting these, it is hoped that the points raised within, will be a catalyst for further discussions for enhancing educational success to more culturally appropriate education that reflects the values, philosophies and aspirations of Pacific indigenous Peoples.

TALANOA AS METHODOLOGY

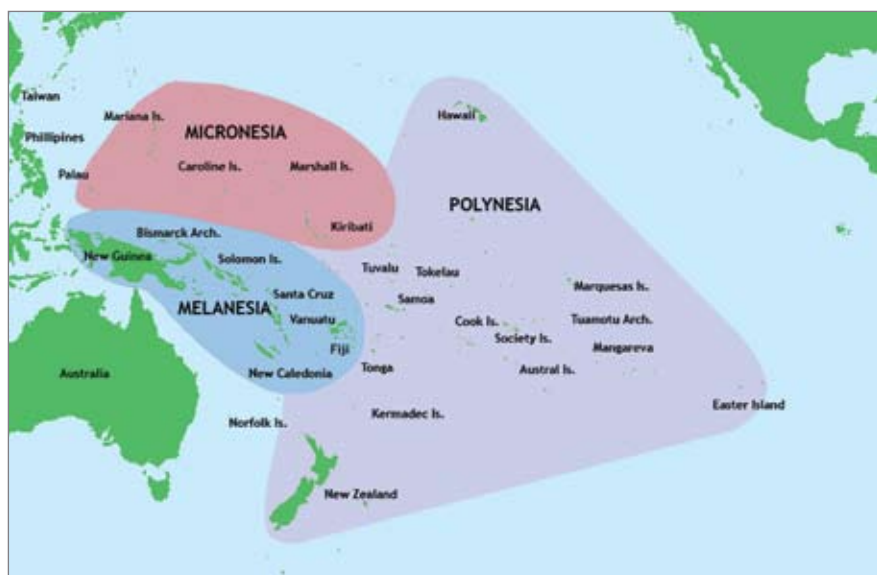
Talanoa was used widely as a methodology in producing this article. Talanoa is a mode of communication that is integral to the way in which many Pacific peoples share information, learn and relate to each other (Morrison & Vaioleti, 2008; Otsuka, 2005; Vaioleti, Morrison & Veramu, 2002; Vaioleti, Morrison & Vermeulen, 2002; Vaioleti, 2003, 2006). The word talanoa is Tongan, but similar terms exist in other Pacific languages for the same practice such as taleanoa in Samoa, and talanoa in Fiji. Talanoa is at the heart of the transmission and construction of knowledge in Pacific societies, especially the passing on of instructions, narrating and the telling of stories (Vaioleti, Morrison & Vermeulen, 2002; Otsuka 2005; Tavola, 1991). Otsuka (2005) found that talanoa was “commonly practised by Pacific Islanders (sic), such as ethnic Fijians” and observed that talanoa “stems from their culture in which oratory and verbal negotiation have deep traditional roots” (p.3).

Talanoa are used for obtaining information, including interviewing, and for finding out how people are feeling about certain things (Otsuka, 2005; Tovala, 1991). There are concepts shared in this article which were co-produced by the writer and a colleague

using talanoa with indigenous people, some in their own country and conditions.

For the word talanoa, Churchward (1959, p.379) stated that “tala” means to command, tell, relate, inform and announce while describing “noa” as common, of no value, without thought, without exertion as well as dumb (unable to speak). Talanoa, from Churchward’s definition, can be referred to as a conversation, a talk, an exchange of ideas or thinking, be it formal or informal. However, for me as a Tongan who is aware of the hierarchical categories and other relational matters that exist generally in the Tongan culture, Churchward’s description does not go far enough in interrogating the deeper spiritual and cultural aspects that make up the many complex components of talanoa.

There are different levels of talanoa, however we will only discuss four types in this paper. Po talanoa are casual self-directed verbal exchanges. The power between participants in po talanoa are relatively equal. Talanoa faka’eke’eke on the other hand is akin to an investigative interview where there is a shift of power to a participant or the party that is seeking a particular knowledge. This only happens though with the consent of others in the talanoa. There is also talanoa tevelo. This involves discussions of spiritual nature, about or on old religion matters, about or with ancestors, which could lift participants to a heightened intuitive state and sensitivity, a level of spirituality that allows them to exchange freely but highly influenced by what seems like a spiritual state. Tevelo, which means devil, was a term given by the early Missionaries to old gods and this type of spirituality in order to turn Pacific peoples away from what they saw as pagan behaviour. Po talanoa often contain elements of talanoa tevelo that lifts participants to this state of heightened spirituality which allows talanoa’i to take place efficiently. Talanoa’i allows parties to search for a perceived truth or co-construct robust knowledge. While the order of the elements in talanoa’i will be determined by its purpose and those in-



Major culture areas of Oceania: Micronesia, Melanesia, and Polynesia.

Kahuroa

volved, it is likely that it will involve analysis, synthesis, reflexive and any other means necessary to reach such goals. The power relationships in talanoa'i are relatively equal amongst the participants. The overarching concept of talanoa has many levels. Competent teachers, learners, researchers and participants can use its full range in real time in order to respond to whatever teaching, learning or research needs, while protecting the integrity of those involved.

Talanoa'i was used predominantly in researching this paper. Po talanoa was used often to identify connections such as shared ancestors or land area, common interest or other connections with participants initially. It created congeniality between the authors and the participants, preparing us well to the talanoa'i level of talanoa. In the talanoa'i, the researcher/participant or a teacher/student, through instant or gradual connections and merging of intellect, mind, heart and spirit, mingle and energise to a state equal to a level of enlightenment (mafana, Godly and loving positive warmth). This is a transcendent pure state beyond the cultural consciousness that dictates age, rank, gender, race and wealth barriers (which is the stage of "noa" in talanoa). This allows those involved in the process of talanoa'i to forge, grow, weave, or co-construct (expressed by "tala" in talanoa) authentic knowledge at this pure state of being. Genuine talanoa allows for rigorous co-analysis and co-constructions to achieve authentic consensus on issues ranging from the quite simple to the very complicated. Talanoa is frequently used for evaluating methods, projects or endeavours in Fiji, Samoa and Tonga (Otsuka, 2005; Tavola, 1991; Vaioleti, Morrison & Vermeulen, 2002).

MOTIVATING CONCEPTS FOR PACIFIC LEARNING

Pacific Education (ako) is about preparing a community where its members co-exist in a sustainable and harmonious way and where everyone know and perform their "fatongia" (role) to each other, to their environment (fonua) and their God/s (Vaioleti, Morrison &

Rees, 2003; Vaioleti, 2010). Ako then is a philosophical stance as well as means to fulfilling ones many cultural obligations. Tiatia (1998) in her book "Caught Between Two Cultures" suggested that the Samoan, Niuean and Tongan societies are built on the assumption that every member knows his or her role in the community. Education then was expected to help learners learn their fatongia to their family, their communities, their environment and their God/s. Hence ako is about teaching those cultural roles and preparing the learners to assist in creating the wealth of the family and community, be they economic, emotional or spiritual.

Part of the methods for doing these are by imparting knowledge as well as co-construction and acquiring knowledge through many ways including teaching and learning. Traditionally Pacific ako was used for cultural continuity too (Thaman, 1988; Vaioleti, Morrison & Rees, 2003) and this was achieved by including their knowledge, values and life examples as integral parts of their curriculum as well as using their own educational concepts and theories of learning to guide their pedagogies.

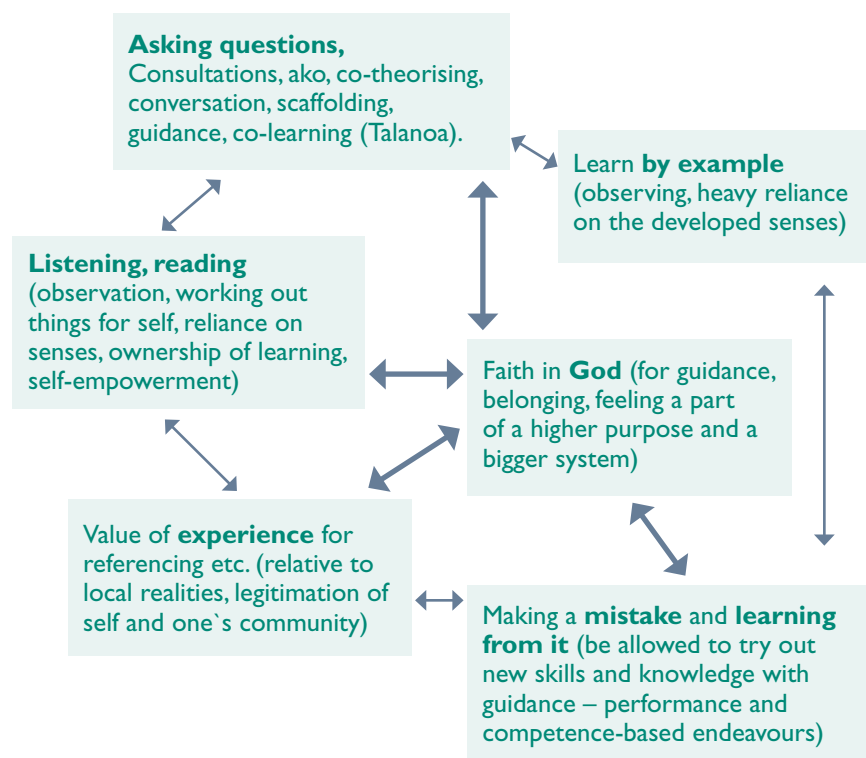
In Polynesia, education (ako)¹ be it primary, secondary or adult education is driven by cultural concept/s of fatongia mentioned above. When people are studying, learning or observing they are seeking "ilo", or knowledge, knowing what to do. When 'ilo is used to benefit the family and the community (fanau²) then the person who has studied or is educated is said to have achieved "poto", or wisdom³. For these cultural outcomes to be achieved, cultural teaching and learning that contain concepts such as "ofa", or compassion⁴, "vahe fakatatau", or equity in burden sharing⁵ must be integral to the approach to increase the chances of making adult education successful.

Learning means being connected to God, ancestors and nature.

If our endeavour as adult and indigenous educators always is to make learning more meaningful to Pacific peoples (and most cases Maori as indigenous people of New Zealand as well) and therefore improve their participation and success in the adult education sector, we must appreciate the reasons why Pacific peoples engage in education and in this case adult education. However due to the limited scope of this paper, it will concentrate on poto to highlight one of the major collectivist motivations behind indigenous peoples' involvement in education (ako).

PACIFIC VIEWS OF LEARNING

In the Pacific, learning usually occurs when there is a need to transfer some sort of knowledge or skill. It usually occurs between people who are connected and within a fanau, a community. It is usually between people of different knowledge levels and possibly between people of different generations (inter-generational). In 2002, the writer and other colleagues secured a contract, through ASP-BAE⁶, with the European Commission to carry out adult education courses for adult education trainers in Samoa. The participants were preparing to go out to the rural villages and communities to help educate various groups on environmental and other developmental issues. The participants were from local NGOs, Government representatives, matai (chiefs) and villagers as well as people from New Zealand and other Pacific nations. In the course of discussions and talanoa over a couple of days, they agreed on the following model as the base for how they would learn best:

Figure 1: Pacific holistic perspective on adult learning

Adapted from Vaoleti, Morrison & Vermeulen (2002; p. 20)

The approach to adult learning shown in figure 1 is multi-dimensional. It is qualitative as well as quantitative. What is unique to the above framework though is the centrality of spirituality. For most Pacific people it is the recognition of being connected to higher beings, ancestors and even to nature and the environment from which most guidance emanates (Vaoleti, 2010). When applied to adult learning, the learners' emotional, cognitive, spiritual and often physical development depends on the educators' skills, empathy, love and attention. In this article and other writings, I refer to this as the educator's fatongia to their learners. Their fatongia was to ensure that learning is relevant and beneficial to the learners and the collective because higher beings moderate most activities, including group learning. In the model above, God represents that moderator in the middle of the model. In the past these activities were presided over by indigenous god/s and those god/s were ancestors of the learners and the community. If tapu (sacred state) were

transgressed, the learners and teachers ensured that quality of learning and cultural safety of all in the learning relationship were protected, as indigenous gods intervene in the day-to-day lives of the community. The need for an overarching watchful eye presiding over learning directions and relationships is still strong in Pacific adult education today - only that presiding entity is now the Christian God.

This type of spiritual connectedness is vital to Pacific indigenous learning as holistic learning is conditional to feeling connected and safe emotionally, physically and spiritually and as a member of a fanau of learners. These feelings are often conditional to knowing that (a) higher being/s is guiding or watching over the educational endeavour (Vaoleti, 2001; Vaoleti, Morrison and Rees, 2004).

The above framework may be problematic for some educators, as it is very difficult to fit these ways totally into any one established mainstream Western theory. However, an appreciation of Pacific ways of learning with respect

to one or several of the Western models may provide a good reference point and facilitate understanding and theorising about a more appropriate model for Pacific adult learning. It is my position that the enactivist theory of cognition may be one that has elements that can have parallels with the above Pacific model.

In light of this claim, the preparation for community roles were learnt in many ways as indicated in figure 1, including by reading, listening and observation (consider Bandura's social cognition theory) with the guidance of an expert (a relation or member of their community). Bandura's social cognition theory suggested that much of human learning is a function of observing and imitating (Bandura, 1997). In the case of Pacific cultural learning, Meleisea and Schoeffel (1996, p.9) stated that:

Polynesian... are conditioned from early childhood to learn passively, primarily by careful observation and listening, reinforced by admonition so that they become sensitised to other people at an early age.

The above statement can explain some of the mundane learning which leads to a blessing of higher emotional and intuitive intelligence as well as a superior level of cultural knowledge while the Western ways of learning values critical analysis and other areas of cognitive development.

Social constructivism is where an educator provides scaffolding to tease out engagement from a learner until such time the learner is confident enough to stand on his/her own (made popular in the West by Vygotsky's (1978) "Zone Of Proximity" theory in the late 1970s). This method has been a mainstay of Pacific teaching and learning for centuries. In this case, an expert may demonstrate a proper way to perform tasks (including cultural roles); learners then imitate those or use them to modify existing ones. The paramount thread that permeates throughout these learning approaches includes reciprocity between the facilitator and learners, and learning is usually within a shared culture.

Socialisation practices complementary to the traditional learning environ-

ments (see Figure 2) are those that encourage active participation, interdependence and empathy. Pacific peoples place a great deal of importance on the affective domain of learning (see Calder et al. in McGee and Fraser, 1994), particularly on teacher empathy (part of compassion, or ofa) and the relevance of learning to their lives (Helu-Thaman, 1988). In Pacific learning, the educator gives guidance, nurture and ofa. In the spirit of reciprocity, the learner will be committed to the learning because s/he will feel obligated to work hard to:

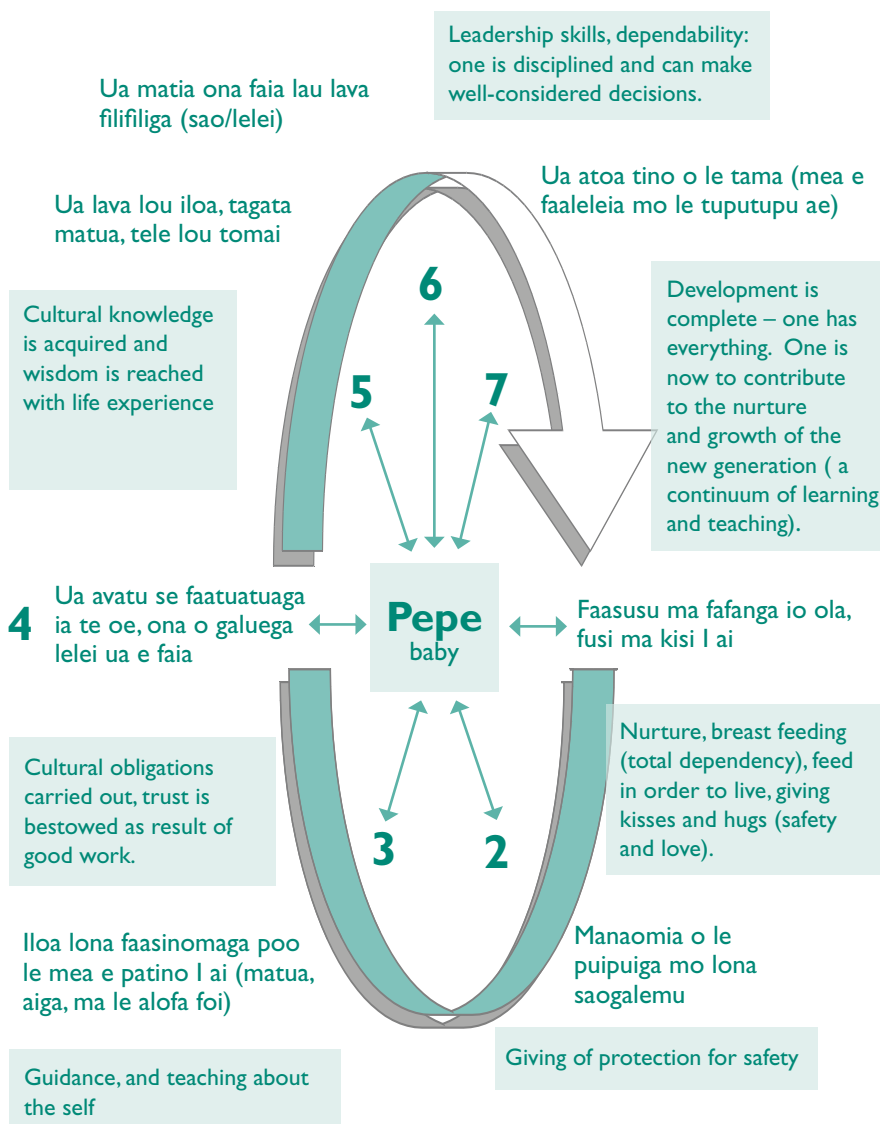
- honour the gift given by the teacher (please her/him) and
- prepare her/himself with means to carryout her/his role (benefiting the whole).

LIFELONG LEARNING AS A CYCLE OF PRIVILEGE AND FATONGIA

At the same ASPBAE adult education courses in Samoa mentioned above, my co-facilitator and I divided the participants up to several groups and asked that they discuss and report to the main groups how they see education in their community. One group consisted of young mothers and grandmothers with little high school education, living in distance villages from the capital of Apia. They suggested an approach, which was basic to their village and indigenous culture. As well as their social and family roles, learning and transfer of knowledge were all modelled in the nurturing relationship between a mother and a baby and the journey of that child throughout her life span. These women suggested the fatongia of facilitators/teachers to their village learners is similar to the emotional, cultural, communal, personal and spiritual fatongia carried out by a loving mother who wants a balance and secure existence for her baby's growth, one she will contribute to maintaining. This fatongia relationship starts from the time the baby is fully dependent on her (mother) for all her needs all the way throughout her life span to the end. This framework, is represented by the following:

This Pepe (baby) framework seems a fair reflection of roles, and everything this concept encompasses, in a Samoan

Figure 2: Pepe lifelong learning framework



Adapted from Vaioleti, Morrison & Vermeulen, (2002, p. 23)

community (tofi in Samoan) throughout one's lifespan. This life role (fatongia) necessitates a life of learning. As the individual comes to this life, she is loved, protected with her every need attended to (stage 1). That may seem like a one-way flow of fatongia from mother and fanau to baby. However one must not forget the contribution that a new child plays in bringing family closer together, being a catalyst for joy and building a sense of responsibility within her family. I see this contribution as the beginning of a fatongia that changes with age as the child (learner) develops different roles at dif-

ferent stages of her life. For lifelong learning, the baby (at stages 1 & 2) learns to feed herself, learn the family's language, learns to communicate, recognise her family, sit up, crawl etc. As that child grows, she learns from others around her about her culture and more about her own fatongia to the fanau (stage 3). At stage 4, the child has reached a stage where she trials out certain duties and learning while being supported and mentored by the fanau and community (her educators and organisation). There will be a stage that she is acknowledged as skilful in carrying her fatongia of nurturing others in

her fanau (stage 5). As one grows and has the confidence of the fanau, she educates others (stage 6) and perhaps has her own children (new learners) as she has proven herself to the community through her actions and duties (own fatongia). This stage in one's life requires more and perhaps different learning. At stage 7, it allows one to enjoy respect accorded to elders (fatongia of learners at earlier stages) but her fatongia now is to pass on knowledge to the next generations through the love, dedication, devotion and protection shown to her at earlier stages of her life and lifelong learning. The result of such is what Thaman (1988) refers to as cultural continuity.

This framework demonstrates the role of the community in shaping the learning lifecycle of a child as she grows. The fatongia of each member of a family then is to learn from her parents, community and schools holistically (ako) in order to know ('ilo), what her duty to her family, community (fonua, culture, God/s (poto)) are and how to carry them out appropriately while contributing to a sustainable and harmonious existence (Vaioleti, 2010). This perhaps then is what Thaman (1988); Vaioleti (2010) referred to as the purpose of education for Tongans mentioned above.

PARADOXES IN EDUCATIONS

Pacific indigenous peoples, like any other group, want reaffirmation of their knowledge and other ways of being to be a part of the way they learn, to be a legislative requirement (Vaioleti, 2011). For this to be achieved, it will mean provision of appropriate education aims, curriculum and teaching and learning approaches for Pacific peoples.

Vygotsky (1986) suggests that we use tools and symbols and as a result, create culture; we are not only culture-produced but culture-producing too. Let us take the case of New Zealand and its Maori population as an example. New Zealand should produce its own constructs to reflect its own social and geographical reality. If what Vygotsky suggested above is true then both compulsory and community education

should include cultural knowledge and use cultural pedagogies that maintain the integrity of our collective indigenous ways as well as Western knowledge. Failure to moderate the dominance of Western constructs in education endeavours will allow the production of a community culture that elevates formal knowledge (while belittling indigenous ones intentionally or not intentionally) and deprive our descendants of security in their geographical identity and Pacific heritage.

The following will highlight clashes between norms of formal learning and a group of Maori and Pacific adult learners. At a particular day set for a test for certification, the learners were barred from talanoa which is part of their normal ako process. The following dialog was taken from that test day.

T: *Stop talking tothis is a test. You are not allowed to talk or help anyone.*

S: *"When we don't know things, you tell us Sir - then we know - you helped us" same here Sir?*

T: *No, the people who are testing you want to know what you and your friends understand.*

S: *That is why we must help each other sir. If we help each other to work out the answers together then everyone will know. Everyone will get good marks and they will think our school is choice⁷ Sir.*

S: *Let us work together Sir "cause you feel dumb when you fail".*

Teacher/facilitator (T), Student (S).

Adapted from Vaioleti (2001, p.6)

The learners above felt that because they are friends and that they are connected through fanau, it is their fatongia to help, support and to share their knowledge when needed by those in that fanau.

CONTRASTING VALUES AND PHILOSOPHIES OF PACIFIC WAYS TO OTHER EDUCATION AND LEARNING

I will now share some experiences from the formal education sector to highlight consistencies in cultural approaches and philosophy to learning throughout the lifespan (lifelong learning) of Pacific indigenous learners. In a New Zealand classroom an observation by Slipa (1999), noticed the strategies used by

Pacific students to cope with a written English subject:

They generated support by flashing books, passing notes and employing non-verbal language in an attempt to reciprocate information amongst them. From what I have gathered, very few were capable of working individually.....most of the students were comfortable in a co-operative way of acquisition of information in groups.....asking a buddy or peer to verify and/or to confirm what was to be done after the teacher had provided a detailed explanation. These are some of the typical examples of questions and comments parts of the communication between students:

- "What are we supposed to be doing?"
- "What have you got down?"
- "What is the meaning of that phrase?"
- "How did you work that out, what about the y?"
- "Could I have a look at your examples?"
- "Can I borrow your book? I just want to copy the examples for my homework."

These examples are not about students' laziness or complacency but a playing out of a communal approach to learning, underpinned by social learning and the influence of role obligations. For the role obligation, it is a realisation of those who know the answers, to have a responsibility to teach others (requirement of ako and poto). Learning is a social activity that provides opportunity for learners to learn and to teach each other (see tuakana/teina learning approach later on in this paper). Vygotsky's (1978) social constructivism theory where people learn by discussions and interaction with others, fits well with ako and cooperative learning ways of Pacific peoples.

Polynesian indigenous views of the world view people as an integral part of the environment, extension of their lands (Vaioleti, Morrison & Vermeulen, 2002; Vaioleti, 2010) not masters of it. The scientific-industrial view of the world (which had dominated education in the western world for 300 years) is now questionable even in

many Western societies (Goldsmith, 1992). Unfortunately formal institutions continue to promote this scientific-industrial view, a view characterised by reductionism, positivism, materialism and rationality. Helu-Thaman (1999, 2000) suggests that Western institutions have to a large extent contributed to the demise of the integrated, holistic, and culturally based learning associated with Pacific societies.

Like all curriculum and formal learning curricula, they are grounded on certain beliefs, values, culture and agenda (Smith, 1990; Coxon et al. 1994) - ones that are enforced in the Pacific indigenous communities tend to exclude Pacific indigenous values. The writers however recognise the technical and commercial advancement New Zealand has made through efficient use of Western knowledge. However, this could have been at the expense of Maori and lately Pacific cultures and resources. Koloto (in Sullivan, 1998) also acknowledged that Western education has brought growth and national advancement to the Pacific communities. Moreover, she suggested that it has been an agent for tangible and positive social change, however at the same time it has undermined traditional knowledge and values of these indigenous communities. I want now to sug-

gest an adult education philosophy that reflects the Pacific educational concepts discussed in this paper.

AKO VS BEHAVIOURISM AND HUMANISM

The following are comparisons of two public educational philosophies that drive mainstream education. These two philosophies discussed in Figure 3 are behaviourism and humanism. Morrison and Vaioloti (2008) suggest that these philosophies are becoming more influential in designing certain national adult education policies, especially those with education systems that require individuals to pay for their own education. These will be in contrast to the holistic philosophies of education of indigenous communities described in parts of this paper. Pedagogies supporting indigenous philosophies differ in various ways; instructional, whakawhanaungatanga⁸, learner-centred, progressive tuakana/teina⁹, etc. This paper is not suggesting that the mainstream philosophies are to be avoided when engaging indigenous people in adult and community education. Rather, they should be included appropriately in a way that is additive to indigenous philosophies as they are part of a mainstream community and

must appreciate the mainstream ways as well. What is important here is not the classification of the approach in itself but the ability to identify that the context will determine the pedagogy used for teaching. For Pacific learners, what this means is that facilitators need to know what attributes and practices generally work well with Pacific indigenous learners and cultural contexts that they will live in after their education.

The matrix of figure 3 highlights the underpinnings of technocratic, professional and holistic ways. While the strength of the technocratic approach is in the technical aspects of teaching and learning, it is one-dimensional and lacks human qualities necessary for the personal relationship approach of Pacific indigenous peoples. Professional approaches on the other hand, incorporate human dimensions such as intrinsic motivation and development of diverse human capabilities but are individualistic and answerable to a special professional code of ethics (no necessary collective values). The holistic approach (ako) includes learners, educators, families and the community in the learning process. These are often guided by an overall philosophy. For ako,

Figure 3 : Ako vs behaviourism and humanism.

	Technocratic (Behaviouristic)	Professional (Humanistic)	Ako (Holistic)
Role Model	Skilled technician	Reflective practitioner	'Ofa/aroha (Compassion, love)
Criterion of good practice	Competence	Integrity	Poto (wisdom)
Pedagogical aim	Attainment of specific learning outcomes	Development of diverse human capabilities	Relationship, meeting role/duties to community, nature etc. (cultural continuity)
Administrative context	Efficient management	Professional leadership	Collaborative/ hierarchical relationship
Motivation	Extrinsic	Intrinsic	Intrinsic/extrinsic (whanau -role)
Forms of accountability	Contractual compliance	Professional commitment	God /society/ family (role)

Adapted from Codd (2000)

it is an education which drives the learner and the teacher to seek and build knowledge which will be used to benefit the collective (one's family, community and environment), not just the learner.

Further, ako is a concept within a collective and within that collective there is benefit and obligation. For example, in most cases for Tongan people, their activities are based in carrying out their cultural roles (Tiatia, 1989) as mentioned above. These are based on serving others who are ranked higher than oneself. One can find God at the end of most Pacific hierarchical thinking: therefore there is accountability to God. In both old religions and the new (Christianity), people are children of God: therefore serving people, especially those that are close to God, such as elderly, women, those who are vulnerable and the land and environment which are God's work secures one favour or blessing from him/her. Under ako philosophy for Pacific peoples, using their language, culture and pedagogies for their education will solidify cultural competencies to carry out their cultural roles in their communities. Serving the communities, which include the elderly, women, the vulnerable and the community's institutions, will please God, an aim by most spiritual Tongan people.

The matrix in figure 3, in demonstrating ako philosophy, promotes inter-dependence instead of independence. It recognises that everyone and most things are connected and everyone draws privilege from membership of the community but at the same time has a role to play in maintaining the welfare of the community and its institutions. Education then has a role in teaching those cultural concepts and values in order for Pacific learners to live a full harmonious co-existence with each other, their environment and their God/s.

CONCLUSION

Pacific education and in the case of this paper, adult education for Tongans and other Pacific peoples, is about seeking

'ilo (knowledge/skills) to equip learners with means to fulfil their role in their community. This motivates learning (ako). In a world that is inter-connected and inter-dependent, roles are a source of a feeling of self-worth. Identity and sense of self (provided by the role) and entities surrounding the self (community and environment) give the self its meaning. For this to happen, adult education must be holistic, relevant and one that validates Pacific values and aspirations. In meeting this, the learner's sense of identity and self worth will be enhanced, which could only contribute to making a happier and stronger community. Spirituality, care and nurturing of learners are parts of the teaching fatongia of educators. However this paper highlights the importance of the support required by those of the dominant culture (those in position of power), to allow this to occur. Supporting Pacific learners to use their own concepts of ako, talanoa in teaching and learning, studying their histories, beliefs, culture and day-to-day activities as parts of the curriculum would go a long way to nurturing them and therefore nurturing their spirituality and self-worth.

A way for Pacific peoples to find liberation is to reclaim their traditional curriculum and then use their culturally appropriate pedagogy to teach them. It is for this reason, talanoa (Vaiioleti, 2003; 2006) was used as the methodology for gathering and co-construction of this article. Pacific indigenous lifelong learning should nevertheless integrate Western perspectives (including elements of behaviourist and humanistic philosophies and others) into it so that their achievements are appropriate for their 21st century as well as holistic in its achievement.

ENDNOTES

- 1 Ako:learning/teaching/co-learning and is usually motivated by some moral or philosophy, it can also mean seeking or searching.
- 2 Fanau is similar to aiga in Samoan; whanau in Maori (Vaiioleti, Morrison, and Rees, 2004).
- 3 Poto:wisdom, or in Tongan terms; knowing what to do and doing it well for the benefit of one's own and

extended family (the collective).

- 4 Compassion, love, spiritual power that drives positive actions, it is aroha for Maori and alofa for Samoan – other Pacific peoples have their own variation of the same word.
- 5 Equity in sharing of burden, resources and benefit and also means sharing should depend on need.
- 6 Asia South Pacific Association for Basic and Adult Education. This regional CSO has over 240 member organisations throughout South Asia, South East Asia, East Asia and the South Pacific.
- 7 Local expression for superior therefore, desired or highly regarded.
- 8 Pere (1994) stated that whanaungatanga..deals with the practices that bond and strengthen the kinship ties of a whanau. The commitment of aroha is vital to whakawhanaungatanga and the survival of what the group sees important. Loyalty, obligation, commitment, an inbuilt support system made the whanau a strong support unit, ... and consequently the tribe (p.26).
- 9 Taukana / teina also works through the dual nature of ako. In the Maori world,.. learner and teacher can change role. Tuakana (older sibling) takes on the responsibility .. as the teacher for teina are encouraged from.. early age. This is the essence of love and care for one another in the whanau. This reinforces the principle of whakawhanuungatanga (Pere, 1994: p.24).

REFERENCES

- Bandura, A. (1997). *Social learning theory*. Englewood Cliffs, NJ: Prentice Hall.
- Calder, I., Faire, M. and McGougan, A. (1994). In Mcgee and Fraser (Eds.). *The Professional Practice of Teaching*, Palmerston North: Dunmore press.
- Coxon, E., Jenkins, K., Marshall, J. and Massy, L. (1994). (Eds.). *The politics of Learning and Teaching in Aotearoa - New Zealand*. Palmerston North: Dunmore press Ltd.
- Churchward, C. M. (1959). *Tongan dictionary*. London: Oxford University Press.
- Giroux H.A. et al, (1996). *Counter-narratives: Cultural Studies and Critical Pedagogies in Post-modern Spaces*. Routledge: New York.
- Goldsmith, E. (1992). *The Way: An Ecological World-View*. London: Random Century Group Ltd.

- Thaman, K. (1988). *Ako and Faiako: Educational concepts, Cultural values and Teachers' role perception in Tonga*. Unpublished PhD Thesis. University of the South Pacific. Suva.
- Koloto, 'A. Issues for education in the South Pacific: education and change in the Kingdom of Tonga. In Sullivan, K. (Ed.). (1998). *Education and Change in the Pacific Rim: meeting the challenges*. Oxfordshire, Cambridge University Press.
- Manuatu, L. (2002). *Pedagogical Possibilities for Tongan students in New Zealand secondary schooling: Tuli Ke Ma'u hono Ngaahi Malie*. Unpublished EdD Thesis, University of Auckland.
- Meleisea, M. and Schoeffel, P. (1996). *Pacific Island Polynesian attitudes to child training and discipline in New Zealand: some policy implications for social welfare and education*. Paper presented at the National Symposium on Pacific Islands Learning, Auckland, 15–16 February.
- Morrison, S. L., & Vaioleti, T. M. (2008). *Ko te Tangata: It is people*. Commissioned report for the Adult and Community Education (ACE) professional development working group. Tertiary Education Commission: Wellington, New Zealand.
- Otsuka, S. (2005). Talanoa Research: culturally appropriate research design in Fiji. *Proceedings of the Australian Association for Research in Education (AARE) 2005 International Education Research Conference: Creative Dissent-Constructive Solutions* [On-Line]. Melbourne, Australia: AARE.
- Pere, R. (1982). *Ako: concepts and learning in the Maori tradition*. Department of Sociology, University of Waikato.
- Silipa, R. S. (1999). *Authenticating Pacific youths in New Zealand* (how to correct mal-presentations). Paper presented at the Pacific vision international Conference Aotea Centre, Auckland. July 27th– July 30th.
- Tavola, H. (1991). *Secondary education in Fiji: A key to the future*. Suva, Fiji: The University of the South Pacific.
- Tiatia, J. (1998). *Caught Between Cultures: A New Zealand-born Pacific Island Perspective*. Auckland: Christian Research Association.
- Vaioleti, T. M. (2001). *We left our Island, people and our culture to educate our children in New Zealand*. paper presented at the Educating Pacifica Positively 2001 conference, Auckland, 10th April 2001.
- Vaioleti, T. M. (2011). Talanoa, Manulua and Foungaako: *Frameworks for using Tongan Concepts in contemporary Classrooms in Aotearoa/New Zealand*. Unpublished PhD Thesis. University of Waikato. Hamilton.
- Vaioleti, T. M., Morrison, S. L., & Vaioleti, E. C. (2003). *A Pacific approach to Adult Education*. Paper presented to the ACE Aotearoa National Conference, Christchurch, New Zealand. 15–17 May 2003.
- Vaioleti, T. M., Morrison, S. L., & Rees. (2003). *Pacific peoples inclusion in ACE development: Report to the Tertiary Education Commission Adult and Community Education Reference Group (Working paper in progress)* Wellington, New Zealand: Tertiary Education Commission.
- Vaioleti, T. M., Morrison, S. L. & Veramu, J. (2002). *Participatory approaches to learning and training component of CROPPRO*. Commissioned report for the European Commission, Soqosoqo ni Vakamarama (26th-30th August). Nabua, Suva, Fiji.
- Vaioleti, T. M., Morrison, S. L. & Vermeulen, W. (2002). *Training for trainers in Participatory learning in Samoa*. Commissioned report for the European Commission, METI. Apia, Western Samoa.
- Vygotsky, L. (1986). *Thought and Language*. Massachusetts Institute of Technology.
- Vygotsky, L. (1978). *Mind in Society: The development of higher mental processes*. Cambridge, Mass: Harvard University Press.



TIMOTE VAIOLETI

Dr Timote M. Vaioleti is Senior Lecturer in professional studies in education at the Faculty of Education of the University of Waikato, Hamilton, New Zealand.

CONTACT

Timote M. Vaioleti
Senior Lecturer
Professional Studies in Education
Faculty of Education
University of Waikato
Hamilton,
New Zealand
Email: vaioleti@waikato.ac.nz

and

Asia South Pacific Association for Basic and Adult Education (ASPBAE)
C/o. MAAPL, 9th Floor, Eucharistic Congress Building No.3
5, Convent Street, Colaba Mumbai – 400 039, INDIA.
Tel : 91-22-2202 1391, 2281 6853 Fax: 91-22-2283 2217
Email: aspbae@vsnl.com
www.aspbae.org

A tour of a world in crisis

Ball, S.J., Maquire, M. and Goodson, I.F. [Eds.] *Education, Capitalism and the Global Crisis*. London: Routledge, 2012. ISBN-10: 041569342X / ISBN-13: 978-0415693424

The question at the heart of this collection of ten chapters, previously published as papers in the *Journal of Educational Policy*, is whether the economic crisis which began in 2008 and continues is structural in nature and, if it is, what the implications will be for government, governance and social systems, especially education. The chapters in the collection explore these issues in a tour of developments around the world.

There are several attempts here at analysis of capitalism and post-capitalist society and the meaning these frameworks have for educational change and development, each of which fails due to a lack of space to explore in depth the arguments they make and through the lack of acknowledgment and exploration of socio-economic complexity and identity as socially constructed meanings within an economic landscape. A good example of this is the paper by Kenway and Fahey, from Monash University in Australia, which explores the emotional landscapes (emoscapes) associated with the experience of the crash and its aftermath. Just as it gets interesting, the paper ends.

Ben Levin, in a valuable contribution from Canada, explores the nature of government in terms of its responsiveness to the opportunities which a crisis affords. While acknowledging the transformative potential, he notes that “the future is rarely shaped differently from the past”. This reminds me of the advice one of my pupils provided to me in my brief period as a high school teacher: “it doesn’t matter who you vote for, the government always gets

in”. This is why Levin suggests we might usefully be pessimistic about the opportunities for change which the ongoing financial crisis affords.

One aspect of the financial crisis in the US and Europe is that it demonstrates the general inefficiency and lack of ethics of unfettered private sector, especially banks. At the heart of the current European crisis, for example, are profligate bank loans and derivatives – German banks lending to Spanish banks so as to fund a housing bubble in Spain, which is at the heart of the current crisis (the public finances of Spain were in fact in surplus when the current crisis began in April 2012). Yet the crisis has been seen as an excuse to expand the role of the private sector into what was hitherto a largely public space. Further, this expansion seeks to avoid disclosure, accountability and transparency which is intended as a hallmark of a public service. This is the point made by Shoul, Stafford and Stapleton in their review of the Building Schools for the Future program – a public: private partnership (known as P3’s) for capital development and the refurbishing of UK schools, now ended by the current coalition government in Britain. What is important here is how such a massive multi-billion investment decision got to be made in the first place by the Blair-Brown government, especially when there is little evidence that pupil performance is directly linked to the quality of the buildings in which learning takes place.

This theme of the privatization of public education takes a sharp focus when Burch looks at developments in the US, where the private sector has taken an increasing role in the day to day management of K-12 schools, exemplified by the company we once thought of as a publisher (Pearson) now owning schools and operating

them. Surprisingly, the author points out that it is the complicity of governments with the private sector – their complex web of contracts and sub-contracts – that permits business to thrive in the gradual privatization of public education in the US and that this is accelerated by the significant intervention of the US federal governments initiatives to improve the performance of US schools. As the role of the state expands, it brings with it more opportunities for commerce.

The most insightful paper in this collection, for me at least, was that by Goodson which focuses on the narratives of educational reform in several European countries – England, Finland, Greece, Ireland, Portugal, Spain and Sweden. He suggests that what appear to be different narratives are in fact similar, but they appear different because they wear the cultural vestments of the nations in which the narratives are situated. The expansion of neo-liberalism, especially “rapid deployment” (as in England and Wales) has not been matched by improved educational outcomes or an evident enrichment of learning. Only those countries which have promoted a social democratic vision and championed the professionalism of teachers (Finland, for example) have sustained high performance on international assessments of learning outcomes.

The economic crisis was experienced differently in Asia-Pacific region than in North America and Europe. For the Asia-Pacific it was not a banking or housing crisis or a crisis of debts and deficits. It was a food pricing crisis – food cost more and this in turn reduced expenditure on education in several countries (Hong Kong and Singapore excepted). Across the region, the trade off which families have to make between food and education has given

rise to higher drop-out and lower completion rates at all levels, but especially at the secondary and post-secondary level, which in turn will hurt the long term competitiveness of these nations in a globalized economy. While some nations have adopted policies intended to favour education as a core value for nation building, the scale of the challenge means that the impact these have had are modest. Similar observations are made in the chapter looking at developments in India by Nambissan, where the crisis served to increase poverty and reduce access to education for many Indian families.

David Hartley, in the final paper in this collection, seeks to give historical perspective to the 2007-8 crisis by connecting it to the history of capitalism and its crises. Pointing to previous events (e.g. the oil price crisis of 1973, the general strike of 1926 as a prelude to the economic bubble burst of 1928) he notes that the period of post-crisis recovery tends to be a period in which new rhetoric and new structural arrangements for public services are rolled out. While these may extend the pre-crisis language, they generally also change the nature of the service the public is seeking to access. Post the 2008 crisis, we see the promotion of public: private partnerships with a strong focus on personalized learning enabled by technology. Such developments require a new rhetoric and new structural arrangements – more collaborative networks, stronger ties to workplace learning and new forms of social engagement.

The crisis is not over. We have simply passed through the first phase. In Europe, the crisis is being made worse by the action of Governments and the EU in imposing austerity for the southern EU states. Bold solutions are not being considered, so the crisis will persist, but take different forms as the nature of statehood and the elements of the new economy emerge. New rhetoric and structures will be tried and fail before there can be a thorough understanding of both the complex challenge and the opportunity for improved public service which the crisis affords.

This book marks a way-station in the dialogue about the future and, though expensive, does have some insights which are worthy of more in-depth review. Unfortunately, each paper is “light” in terms of analysis even though each is also insightful. Most of this thinking is more freely accessible in other places online and by pursuing the writings of these authors in more readily available different places.

STEPHEN MURGATROYD PhD, FBPsS

FRSA is a management consultant, writer and publisher. He is the author of *Rethinking the Future – Six Patterns Leading to the New Renaissance*. Edmonton: futureTHINK Press, April 2012.

This crisis will make us learn

Gleb Bogatskyi

How long has the Western education system been in crisis? It is not an overstatement to date the beginning of this crisis around the 1960s, when the disparity between the education system and the needs of the new post-industrial society became drastic.

The education system has proved to be too inert and incapable of adaptation. At school, crowded classrooms with a frontal configuration of desks and vast amounts of unapplied information have remained the norm since the Industrial revolution.

The reason behind this form of education was a genuine need to educate masses of workers. But that time is gone. Now, modern schools merely aim to equip students with skills they need to continue their schooling. A school that teaches to memorize information is irrelevant in today's reality. Rather, it would be important for a learner to study his or her own nature through an open discourse with others. Discussions and games are more necessary than lessons. They are not entertainment, rather they are procedures developing personality, if conducted by specialists.

Currently, school learners often spend the bulk of their time in class anticipating the end of the school day. They graduate from school and later from university lacking the most essential social skills, meaning the ability to take others into consideration and see one's own place in society, finding one's social mission and ways to its completion. As a result, so-called "educated" people are doomed to spend their lifetime in permanent conflicts in all aspects, starting with problems of self-esteem and family.

Some people realize the need for additional education and enter the system of lifelong learning. However, in today's rapidly changing world with its mostly archaic education system, every single person needs lifelong learning of a new type. Its focus should be not on new qualifications and personal efficiency, rather it should focus on the development of "global social skills". By global social skills I mean studying and understanding the profound interdependence of the globalized world, grasping one's place in it and assuming social responsibility of our fellow citizens and embracing other cultures. The growing interdependency of the world is a kind of a "black box", a mystery. Its role in our life is growing exponentially as the global society is becoming one body. Today, an earthquake in Japan changes insurance premiums in the USA and attitude toward nuclear energy in Finland, where there are no earthquakes. There are no two people in the world who are not influenced by each other's behavior.

RIGHT ENVIRONMENT FOR GLOBAL SOCIAL SKILLS

Numerous studies (Solomon Ash, Philip Zimbardo, Nicholas A. Christakis, etc.) argue that the paramount element in the molding of personality is the environment. True education takes place only when a person is put in the right environment. To rear a community that will not perpetuate the current crises, but will even prevent them, we must create a different social environment for people of all ages. What could this right environment be? It does not have to be composed of people who have already acquired values neces-

sary to survive in the global reality. Rather, it should include people who realize the need for a change in their values and generally agree that this change should be along the lines of mutual social responsibility.

The environment comprises not only of people one works, studies and lives with. The environment is what one hears on the radio, what one reads in comments on the Internet and what one sees in commercial ads. The environment includes even the thoughts and moods of surrounding people, influencing their speech and behavior. The educators' task is to optimize every person's environment, so that it transmits more global values and less individualistic values. A conscious person's task is to constantly choose a better environment, consciously filtering incoming information and selecting the constructive messages, i.e. those that further global social skills.

The right environment has no teacher. An educator is an instructor or tutor, who knows the desired outcome of learning, but is otherwise an equal of the learner and completely involved in the learning process.

All this being said, in general, human beings nevertheless pay attention to the global multi-crisis exactly to the extent to which it touches their welfare. In this sense, we should be thankful to the economic crises that have been shaking the global economy recently. They make us recognize all other crises, including the crisis of education. The tricky thing is that so far the economic crisis hurts the education system instead of pushing it to change. The interview below touches more upon this theme.

Finding one's place in the global world

The European Network for Global Learning (EN4GL) was formally founded in 2011, though it is based on previous collaborations between its members. The EN4GL involves experts with various academic backgrounds, aware of the radical change that is taking place in the global society at these crisis times. The network facilitates collaboration in order to raise the efficiency of development of new education programs and publishing relevant literature. It also organizes Internet-based discussion groups in order to spread a new social discourse aimed at finding the best approach to global issues. As stated on the network's website (learnglobal.net), the EN4GL "is a collaborative initiative between academics, educators and journalists to help our societies make the global shift smoothly through education".

In this interview two members of the EN4GL have their say on the current economic crisis and its effects on education. Johann Savalle is the Network's founder from France. Damir Marinic is a psychologist from Croatia.

Gleb Bogatskyi: What do you make of the current economic crisis in Europe and beyond?

Damir Marinic: In the modern world one is hard pressed to find any aspect of life or institution which is not going through an irresolvable crisis. Nobody knows what to do with the debt crisis in Europe. Structural unemployment throws millions of skilled people into the street. The enormous percentage of

divorces keeps growing. Drug addiction and depression destroy people's lives in all social classes. No solutions are found for the global ecological and resource threats.

This multi-crisis will not be resolved until we adjust our network of connections and make it truly global. Each person must recognize the nature of the world we live in, and understand that in the 21st century, one's personal life depends on one's attitude toward others. Therefore, I think that we must educate ourselves and each other into being sensitive toward others and responsible in our approach to the world.

Furthermore, the structural unemployment of current times cannot be resolved by re-training, because there are no new professions that would require that much skilled labor force. However, the solution is in education, not in terms of training new professional skills, but rather in terms of developing global social skills

Johann Savalle: I would add that the global society's survival is doubtful as long as the issue of financial sustainability of education is undermined. Investing in educating people means investing in social change and security.

Gleb Bogatskyi: What do you mean by education affecting security?

Johann Savalle: Learning global social skills increases the awareness and ability of a regular citizen to cope with the complex system of interdependency. This includes sustainable consumption habits. Reasonable consumption decreases so-

cial inequality, thus raising the degree of security.

Gleb Bogatskyi: To summarize what you have said, adult education is vital for today's global society, especially during a crisis, and its most essential aspect is learning global social skills. This means that the education system should be the first to be led out from the crisis. But instead education funding is cut – how to resolve this conundrum?

Johann Savalle: There is always a way out. First, global learning does not have to be costly. Volunteer-based educational organizations and Internet-based courses do not require much investment. Personnel of corporations should be educated at the expense of employers. We just have to make it obvious that corporations will get more efficient and stable labor force if they invest in this type of education. Besides that, there are many people who are aware of their own need for global learning. They should participate in building user-generated low-cost systems for its provision. Finally, global learning can be university-based, especially in open universities.

Gleb Bogatskyi: Is this enough to make lifelong learning sustainable?

Johann Savalle: The governments still do not understand that their own political sustainability depends on the social skills of a typical citizen, who does not care whether there are sufficient general resources or not. He just struggles for a share of resources in order to survive. There are two ways to help him. As they say in China, giving a fish to a

starving man you save his day. Teaching him to fish you save his life. In other words, since we have no sufficient resources to provide the actual needs for all those protesting masses, we should pay attention to what we must teach them. And the answer is – global social skills, how to live in a global world. This means understanding and being aware of the factors that determine life in a globalised world, namely interdependence and interconnection. If I acquire global social skills, I will be able to make more efficient solutions and use my resources sustainably, taking into consideration my interdependence with everyone else. I will react emotionally differently to any situation.

Gleb Bogatskyi: Yes, a different emotional reaction to what is going on is of a great importance. Our life would be absolutely different if we took crisis situations as learning experiences, rather than simple outcomes of random circumstances. Accordingly, a person who acquires personal life skills and imagines that now he or she will definitely survive even if everyone else fails, can no longer be seen as a progressive individual.

Johann Savalle: The ideal situation is this: A globally educated citizen is no longer a protester demanding some impossible gratifications. He is an efficient social actor finding his most productive role in society and ensuring the optimal distribution of available resources. It is as simple as, for instance, practicing reasonable consumption, which is healthy and stress-free. But it requires a special way of thinking. As long as we keep the citizen's consciousness as it is and cut education budgets, we leave people in troubles instead of helping them to help themselves.



GLEB BOGATSKYI

Gleb Bogatskyi, MSc, is a Russian journalist and author specialized in topics of global crises, multiculturalism, education and art. Mr Bogatskyi is a specialist in macroeconomics, with a Master's degree from the University of Helsinki, Finland. He is a member of the European Network for Global Learning <http://www.learnnglobal.net>

CONTACT

Gleb Bogatskyi
Email: zoomeat@gmail.com