Educating the World

International Organizations and the Construction of Lifelong Learning

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by

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Abstract

While the 1960s and 1970s still knew *permanent education* (Council of Europe), *recurrent education* (OECD) and *lifelong education* (UNESCO), over the past 20 years, *lifelong learning* has become the single emblem for reforms in (pre-) primary, higher and adult education systems and international debates on education. Both highly industrialized and less industrialized countries embrace the concept as a response to the most diverse economic, social and demographic challenges – in many cases motivated by international organizations (IOs). Yet, literature on the nature of this influence, the diffusion of the concept among IOs and their understanding of it is scant and usually focuses on a small set of actors. Based on longitudinal data and a large set of education documents, the work identifies rapid diffusion of the concept across a heterogeneous, expansive and dynamic international field of 88 IOs in the period 1990-2013, which is difficult to explain with functionalist accounts. Based on the premises of world polity theory, this paper argues that what diffuses resembles less the bundle of systemic reforms usually associated with the concept in the literature and more a surprisingly detailed model of a new actor – the lifelong learner.

keywords: *Diffusion ● Lifelong Learning ● World Polity ● International Organizations*

Zusammenfassung

Das Nebeneinander von unterschiedlichen Bildungskonzepten wie *Permanente Bildung* (Europarat), *Lebenslange Bildung* (UNESCO) und *Regelmäßig wiederkehrende Bildung* (OECD) prägte die internationale Bildungsdiskussion in den 1960-1970er Jahren. Inzwischen hat sich mit dem Begriff *Lebenslanges Lernen* (LLL) ein emblematischer Überbegriff etabliert, der Reformen in Systemen frühkindlicher, weiterführender und Erwachsenenbildung gleichsam beschreibt. Zudem ist er zu einem Schlüsselbegriff international-geführter Bildungsdebatten geworden. Sowohl hoch als auch weniger industrialisierte Staaten messen dem Konzept als Antwort auf unterschiedlichste soziale, wirtschaftliche und demographische Probleme verstärkt Bedeutung zu, oftmals beeinflusst durch internationale Organisationen (IOs). Die Art dieses Einflusses, die Diffusion des Konzeptes zwischen IOs und deren Verständnis von Lebenslangem Lernen bleibt jedoch weitgehend ungeklärt und wurde bislang nur für wenige IOs untersucht. In dieser Arbeit wird auf der Grundlage von Längsschnittanalysen und einer umfangreichen Auswertung von Bildungsdokumenten die Diffusion des Konzeptes innerhalb eines heterogenen, expansiven und dynamischen Organisationsfeldes von 88 IOs für den Zeitraum 1990-2013 nachgezeichnet. Diese Verbreitung ist in ihrer Geschwindigkeit und Ausdehnung kaum mit funktionalistischen Ansätzen zu erklären. Unter Zuhilfenahme des World-Polity-Ansatzes lässt sich auch der Inhalt dieser Diffusion neu bestimmen: statt der oft mit LLL in Verbindung gebrachten systemischen Reformmaßnahmen wird in dieser Arbeit die Diffusion eines neuen Akteurmodells – des Lebenslangen Lerners – hervorgehoben.

Schlüsselbegriffe: *Diffusion ● Lebenslanges Lernen ● World Polity ● Internationale Organisationen*

List of Abbreviations

(see Appendix A for a full list of organizations and their abbreviations)

AE	Adult Education
ANOVA	Analysis of Variance
BRICS	Brasil, Russia, India, South Africa
CONFINTEA	World Conference on Adult Education
ECCE	Early Childhood Care and Education
EFA	Education for All
GNP	Gross National Product
GTM	Grounded Theory Methodology
HE	Higher Education
IALS	International Adult Literacy Survey
IAEA	International Atomic Energy Agency
ICT	Information and Communication Technology
INGOs	International Non-Governmental Organizations
IOs	International Organizations
IR	International Relations
ICT/ IT	Information and Communication Technology/ Information Technology
GATS	General Agreement on Trade in Services
GSP	Global Social Policy
GTM	Grounded Theory Methodology
LLL	Lifelong learning
MC	Member Country
MDG	Millennium Development Goals
OMC	Open Method of Coordination
PDF	Portable Document Format
PISA	Programme for International Student Assessment
SAP	Structural Adjustment Program
TNC	Transnational Corporation
TVET	Technical and Vocational Education and Training
UIA	Union of International Organizations
UIE	UNESCO Institute of Education
UNDP	United Nations Development Programme

UNHCR	United Nations High Commissioner for Refugees
UNODC	United Nations Office on Drugs and Crime
WCEFA	World Conference on Education for All
WER	World Education Report
WWI/WWII	World War One/ Two
YIO	Yearbook of International Organizations

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Introduction

International organizations (IOs) have always been involved in education. The oldest of all – the Catholic Church – has been sending out missionaries into the world and teaching the gospels for almost two millennia. The early 20th century saw the rise of the first international organizations founded to promote education worldwide, such as the International Federation of Secondary Teachers (1912) and the World Association for Adult Education (1918). In the same period, evolved what we today call the international system, primarily represented by the League of Nations and the associated bodies such as the International Committee of Intellectual Cooperation (UNESCO's precursor) and the International Labor Organization. It was within these still fragile structures that an international educational sector burgeoned in the first half of the 20th century.

Since then IOs have grown considerably in number and kind. This holds true for IOs in general and those dealing with education in particular, reflecting the wider interest in and importance attached to education in the second half the 20th and the beginning of the 21st century.

Such interest in and importance of education find expression in what has in the last 20 years come to be called lifelong learning (LLL), an omnipresent label that seems to designate a large bundle of ideas of how to reform existing national education and labor market systems. Astonishingly fast, countries around the world have started to embrace and praise the label in their formal statements and their policy initiatives.

Similar interest in the concept might be assumed for IOs. The 1960s and 1970s already saw the rise of concepts such as 'permanent education' (Council of Europe), 'recurrent education' (OECD) and 'lifelong education' (UNESCO), all of which revolved around the idea of the educationalized life-course. In the 1990s, organizations agreed on a unified terminology. The EU now integrates programs like Comenius, Erasmus, Da Vinci and Grundtvig into the umbrella Lifelong Learning program. The UNESCO Institute of Education is now the UNESCO Institute for Lifelong Learning. The OECD announced *Lifelong Learning for All* in 1996 and the WB (2003) as a global and universal membership organization declared *Lifelong Learning in the Global Knowledge Economy*.

Despite the, by now considerable body of both theoretical and empirical literature on LLL, in both the national and international context (Ch.1), some crucial questions remain unanswered (Ch.2). Among these we can emphasize two major puzzles. One is of quantity and another of quality.

We will first see that virtually all studies on LLL focus on a small set of organizations, notably those mentioned above. I hypothesize that such a narrow analytic scope largely obscures phenomena in other geographic areas and within other types of organizations. My analysis of a sample of 88 organizations lends strong support to the assumption that there is a heterogeneous international organizational field emerging that is surprisingly expansive (in terms of growth in number over time and growth in personnel, staff, members and publications) and dynamic. The latter can be seen in the fact that the vast majority of organizations might well be unified by a single frame of original mandates, aims and missions as expressed in notions of development and progress, yet not explicitly by education. Only after foundation, do IOs start to become interested in education and more recently in LLL.

The second question asks about the substance of diffusion, that is, of LLL. More often than not, relevant contributions to this kind of policy analysis in education base their research on already-available categories, framing their analysis by a stylized heuristic marked by pre-defined assumptions about the sectors, reforms and purposes of LLL. More importantly, these accounts either take the functionality of LLL for granted or they critically dismiss it as a strategy to introduce market mechanisms into an education system that has traditionally been publicly funded.

In contrast, this work – sociological in discipline and macro-phenomenological in analysis – understands education as primarily institutional, deeply embedded into the increasingly global cultural fabric. Drawing on neoinstitutionalist premises from both its more meso-sociological and macro-sociological strands attention is directed to processes of theorization and institutionalization of LLL (Ch. 3). Based on a large set of "world cultural data" comprising documents produced and published by IOs that explicitly refer to LLL in their work and using grounded theory tools, I will inductively take stock of the ideational inventory that has come to be associated with LLL. Such ethnography of world culture lays bare rationalized visions of a future educated world, which is not free of contradictions but apparently disembedded from politico-ideological cleavages. Instead, the construction of a myth of the modern individual looms large.

1. Phenomenon: The global diffusion of lifelong learning

Sections in Chapter 1 serve to present what we know about lifelong learning (LLL) both with regard to the substantive novelties the concept is believed to encapsulate and the more contextual phenomena such as the actors involved in propagating the concept. “Global” refers to two analytical objects: national states and international organizations. As we will see, most contributions come from and refer to industrialized countries and a small set of IOs. I will look out for particular implications of LLL for less industrialized countries and other less prominent IOs whenever necessary and possible based on the available literature.

1.1 Defining lifelong learning

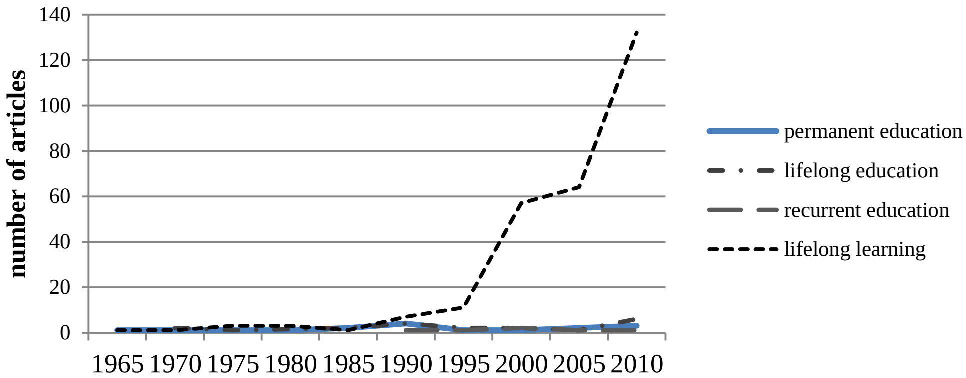
Literature on lifelong learning (LLL) can broadly be distinguished between works that either treat LLL as an *educational* or *pedagogical concept* centering on issues like curriculum, didactic methods, learning biographies and access to LLL opportunities (Gieseke 2003; also contributions in Jarvis 2010) or as an *educational policy*, shedding light on policymaking and diffusion processes, often from an international perspective (for example Jakobi 2006). While the former is mainly discussed in education, LLL as a policy field has recently been discovered by scholars from political science, where education in general “has remained a 'homeless' and widely underestimated topic during the last decades” (Jakobi et al. 2010:1). This work sits between these two foci in discussing both the content (*What?*) and the extent (*Who?*) of an assumed global diffusion of LLL. It is, therefore, necessary to review contributions from both perspectives.

1.1.1 Meanings

Lifelong learning has seen a remarkable increase of interest in education and other social sciences. Based on entries in the Web of Science/ Social Sciences Citation Index[1], publications on lifelong learning have grown exponentially in the last 20 years (Figure 1.1). More and more adult education professors now call themselves professors of lifelong learning and universities like Warwick, Leeds, Manchester or Leipzig, for example, have renamed chairs of adult education as chairs of lifelong learning.

[1] The SSCI includes more than 1,700 journals from more than 50 social science disciplines.

Figure 1.1: Publications on lifelong learning and related concepts (WoS/SSCI 2013)



Despite such prominence, it remains true what Cross (1981:253), observed, more than 30 years ago when noting that the term lifelong learning is "slippery, strikingly inconsistent, and subject to varying interpretations". In search of a common understanding of what is new about the concept, that is to say what distinguishes it from the traditional education system, one might mention three dimensions: (1) a *temporal* dimension where life phases and education sectors are emphasized; a (2) *spatial* dimension that is made of the integration of different sites of learning (formal, non-formal and informal) and (3) a *systemic* dimension that asks questions about possible implications of the fact that – at least terminologically – *education* is replaced by *learning*. Each of these three dimensions will be given attention in this section.

The temporal dimension

Most contributions define LLL as an idea impacting on *adult education* (Field 2006; Kade, Nittel & Seitter 2007; Schemmann 2007; Hof 2009; Jarvis 2010). Therein, apart from occasional references to literacy, liberal and critical civic education and community education, sometimes with explicit references to less industrialized countries (Johnston 2000; Rossbacher 2007), most scholarship concentrates on vocational education. Both vocational and non-vocational adult education is discussed with similar approaches in poor countries and rich countries alike (Jakobi 2006; Hasan 2012)

Discussing an early predecessor of LLL – recurrent education (see below) – Boyle (1982) depicts the traditional front-end model as compulsory education plus initial education with both taking place within formal systems (Figure 1.2).

Figure 1.2: Traditional front-end model (Boyle 1982:8)

The model of recurrent education, in turn, would suggest alternating phases of learning and working throughout workers' professional lives (Figure 1.3). The model assumes that knowledge acquired during formal education does not last and needs to be refreshed on a regular basis. For this purpose workers should be able to take educational leave, during which they gain insights into new developments in their field and then apply them once they return to their former or new workplace.

Figure 1.3: Recurrent education model I (Boyle 1982:8)

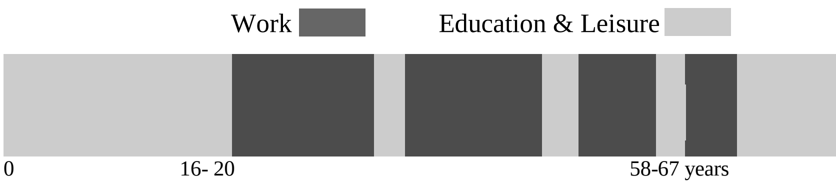


Figure 1.4: Recurrent education model II (Boyle 1982:8)

A second variant would be a combination of alternating work and learning phases and “learning on the job” (Figure 1.4). The advantage over model I may be that workers would be less obliged to leave their workplace to upgrade their skills. Instead, they could remain at their place of work and acquire the necessary knowledge while continuing working.

Besides vocational adult education, LLL has also been discussed in the context of *higher education*. Here, the emergence of the “non-traditional student” is thought to challenge the traditional status of academia as a post-compulsory rung of the educational ladder that once accommodated only a small elite (Schuetze & Slowey 2000:4). The traditional student –

defined as male, white, able-bodied, upper class, directly entering high school from secondary level and studying full-time – is more and more accompanied by an ever growing number of “delayers”, “second chancers”, “refreshers”, “recyclers” and “personal developers” (OECD 1987).

Further, modularization of studies, the use of information and communication technologies (ICTs) and, flexible modes of payment, as well as blurring boundaries between formal, non-formal and informal learning processes through official recognition (see below), paved the way to campuses (virtual or real) for many students who would otherwise not have decided to enter or re-enter university. This trend towards more flexibility in academic studies is further buttressed through the emergence of corporate universities that seek to tie together bonds of professional recruiting (or corporate attachment) and academic learning (Jarvis 2000) as well as privatization efforts (Jakobi 2006).

More rarely, LLL is understood as *early childhood care and education* (ECCE) (Jakobi 2006). Here, ECCE would lay the foundations for later educational interventions. It is argued that early learning enhances late educational achievement. In general, the “discovery” of early childhood and its current worldwide institutionalization are framed in a LLL perspective (Tag 2012).[2]

The spatial dimension

Discussions about LLL regularly add life-*wide* to life-*long* learning, referring to different learning situations or types of learning (the horizontal *e* axis instead of the vertical); (Hof 2009).

From mid-1970s at the latest, researchers and educators speak of three different types of learning or education: formal, non-formal and informal education. Definitions of each of these concepts were first introduced by Coombs and Ahmed in their landmark study sponsored by the World Bank and carried out under the auspices of the International Council for Educational Development (ICED).

Coombs and Ahmed (1974:8) equate education with learning and state that informal learning is

> “the lifelong process by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment –

[2] Note that the first UN World Conference on ECCE took place only recently, in 2010 (Moscow).

> at home, at work, at play; from the example and the attitudes of the family and friends; from travel, reading newspapers and books or by listening to the radio or viewing films or television."

The informal learner is Bourdieu's (1984:513) *autodidact* lacking any officially recognized and legally protected degree allowing for any subsequent use in the formal education system or labor market. In this sense, informal (and sometimes non-formal) non-institutionalized cultural capital is subject to a constant burden of proof since it is not certified by educational institutions, whereas non-formal education is described as

> "any organised, systematic, educational activity carried on outside the formal system to provide selected types of learning to particular subgroups in the population, adults as well as children." (Coombs & Ahmed 1974:8)

What separates informal from non-formal learning is that the latter is characterized by "deliberate instructional and programmatic emphases", while informal processes occur unintended, often unnoticed and with no intention or subsequent occasion to make use of them (La Belle 1982:81). Non-formal learning is often voluntary (and paid-for) and more learner-centered, as well as participatory, than formal education. It has seen a strong increase in recent years in Western societies where burgeoning trends of "self-development", "self-actualisation" and "self-help therapy" can be observed (Field 2006:72).

Adult education practice shows that non-formal learning also takes place on a large scale in less industrialized countries. Unlike rich countries' book clubs, reading circles, fitness centers, sports clubs, study tours and so on, non-formal educational efforts in poor countries include agricultural training, consciousness raising, community development, technical/vocational training, literacy and basic education, family planning, health education, AIDS/ HIV prevention, environmental education and so on. Often these courses are offered by foreign INGOs, local NGOs or development agencies and end with handing out a certificate proving the participants' acquired skills.

The last of the three types – formal education – is what most researchers have so far concentrated on in their work on LLL. The term describes "the highly institutionalised, chronologically graded and hierarchically structured education system" (Coombs & Ahmed 1974:8).

The distinction between various learning types needs to be put into the context of not fully-fledged education systems and highly informal employment situations in less industrialized countries. Although highly problematic with regard to anthropological notions of work and production and their methodological implications, according to some studies informal arrangements can amount to 90% of the total labor market and training system in the least industrialized countries (AFDB 2007b). Such numbers cover traditional ways of learning, training, working and living (e.g. subsistence farming) outside the official government scope.

One of the LLL core themes in the spatial dimension, and a salient example of how discourses in rich and poor countries converge, is *national qualification frameworks*. They constitute a catalog of skills and qualifications acquired in very different learning settings at different stages in the learner’s life. The frameworks aim at the standardization of learning achievements enabling learners, educational institutions and employers to assess, compare and “upgrade” qualifications. We will see below how qualification frameworks have made their way into highly diverse national education and training systems as LLL reforms.

The systemic dimension

Early versions of LLL still bore *education* in their name. The OECD's *recurrent education*, UNESCO's *lifelong education* and CoE's *permanent education* were all conceptualized around a *system*. Aside from attractive alliteration, what does policy designers and makers motivate to name their concepts lifelong *learning* instead of *education*?

Rivera (2006:118) recalls

> “an American and English-speaking anomaly with regard to the UNESCO-developed concept of lifelong education [first introduced in the early 1970s, M.Z.], that *we* say 'lifelong learning', a phrase meant to suggest the absence of system and the presence of the learner as final authority in the educational transaction.”

The same observer remembers the UNESCO conference on lifelong education in 1976 where most European participants approved of lifelong *education*, while those from the UK, the USA and Australia stressed “the importance of the individual's capacity and responsibility for learning”, as expressed in the notion of *lifelong learning* (Rivera 2009:284).

For many observers, the priority of *learning* over *education* in the current debate documents (1) the increasing commodification and marketization of education, and (2) the shift away from the system, state, society and collective responsibility towards the individual (Field 2006; Gruber 2007).

As a result, (1) educators and teachers would turn into coaches and trainers, pupils and students would become customers and clients and, eventually, courses and certificates would be advertised like products. Most gravely, it is feared that such a commodification of education would lead to greater inequality in the provision of and in access to education (Schuetze & Casey 2006).

The individual would (2) be seen as entitled to the human right of education, but equally submitted to the obligation to harness the latter leading to an outburst of “new adult education" marked by "active consumption", "personal development" and "self-realisation" enabling individuals to "work on their body, their identity, and their relationships" on the one hand and the hitherto unheard-of situation of state-mandated vocational training as active labor market policy in many OECD countries on the other (Field 2006:59). By the same token Griffin (1999:434) warns: "At the level of government strategy, people may be variously persuaded, cajoled, bribed, threatened or shamed into becoming active individual learners: their learning cannot be mandated."

Some argue the tendency to replace *education* with *learning* "depoliticizes" the field and threatens to remove a large area – equity and resource allocation – from the research and policy agenda (Duke 1999). This implies that the state backs out as warrant of equality (of opportunities and results) and failure becomes individualized (Beck 1986; Wenning 1999). It is these questions that might turn LLL into "an explosive policy issue", since it has the potential to reflect our "way of thinking about and structuring our society's approach to education" (Field 2006:17).

1.1.2 Models

Beyond the three definitional elements commonly associated with lifelong learning and which, upon implementation, might imply changes for the traditional education and training system, some authors proposed to speak of different LLL *models*. As it is one of the main objectives of this work to understand the diffusion of lifelong learning as a specific *model* or *type* of education propagated at an international level, it is imperative to explore the possible dimensions of such models.

A significant contribution to the field can be found in Schuetze (2005) and Schuetze and Casey (2006). Their focus on the international range of models provides a welcome point of departure. The authors distinguish between

(1) a *social justice* model that would "push the notion of equality of opportunity and life chances through education in a democratic society" and equals "an idealistic, normative and somewhat utopian concept" (Schuetze & Casey 2006:282-283).

(2) a *cultural model* of LLL as described as "a process of each individual's life itself, aiming at the fulfillment and self-realisation" (Schuetze & Casey 2006:283). This model seems to be free of

utilitarian notions; neither does it imply any public social policy intervention. If submitted to any purpose, then it is only to those defined by the individual learner. Settings would then be non-formal and informal and time spent would be leisure time. Historically, this model is close to what historians see as liberal adult education in early 20th century Europe and North America.[3] In current debates, however, it receives less attention from scholarship (see Wiesner & Wolter 2005; Schuetze 2005 for instance[4]).

(3) an *open society* or *liberal model* that understands LLL as an "adequate learning system for developed, multicultural and democratic countries", defining learners as "all who want, and are able, to participate (Schuetze & Casey 2006:283). One distinct feature of this model is the elimination of barriers between formal, non-formal and informal settings, especially through new ICTs such as on-line learning. Contrary to the emancipatory model, the liberal model is based on individual learners in that informing about, planning, choosing and organizing of learning opportunities are part of each person's responsibility. Schuetze (2005) sees most OECD countries as currently reflecting this model.

(4) the *human capital model* where LLL "connotes continuous work-related training and skill development to meet the needs of the economy and employers for a qualified, flexible and adaptable workforce" (Schuetze & Casey 2006:283).

Schuetze and Casey's (2006) work might provide ideal types of LLL proper. They can be complemented with more general models proposed by Wiesner & Wolter (2005:12). Tying LLL to the (equally prominent) notion of the *learning society*, they distinguish between an (1) *egalitarian, participatory model* (i.e. the emancipatory LLL model above), a (2) *post-modern mode*l (approximately the liberal LLL model above) and a (3) *market model* (the human capital LLL model above). They go beyond the description of inherent educational ideals and point to the systemic implications entailed by each model by defining the institutions that come into play in a given LLL scenario.

(1) In an *egalitarian model*, the state is charged with providing learning opportunities, especially to underprivileged groups. Beside this public imperative, there is the interplay between civil society and learning citizens entrusted with the organization of education.

(2) The *postmodern model* centers on the individual as the main actor. The learner is responsible for organizing learning opportunities although public and private provision is equally implied. An additional focus is on dissolution of barriers between formal and informal arrangements.

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[3] See Kelly (1970) on Britain, Kade, Nittel and Seitter. (2007) on German-speaking countries, Olbrich (2001) on Scandinavia, Knowles (1962) and Justice (2000) on North America.

[4] Vol. 36, No. 3 of *Compare* was dedicated to *International Concepts and Agendas of Lifelong Learning* and did not specify this model either.

(3) A *market model* would then operate without public intervention and only be subject to demand and supply mechanisms. The learner becomes a rational seeker of self-optimization to improve market positions by augmenting qualifications and skills. Employability in a globalized knowledge economy then becomes the overriding priority.

It seems to be a popular approach to open a continuum between the antagonistic poles of emancipatory and human capital models. Both models have been given most attention in the literature. The latter has often been referred to as the “neoliberal model” (Rutkowski 2007), the “neo-conservative model” (Schuetze 2005), the “utilitarian man power approach” (Rivera 2006) or the “instrumental model” (Schemmann 2007).

In contrast, Rivera (2006:121) calls for a “cultural”5 approach in international strategies for the development of adult education based on “democratic society's need for political development to ensure for an enlightened citizenry, the importance of historical awareness, international understanding, social meaning, self-development.” In addition, a considerable number of critical contributions developed in the 1960s and 1970s, often informed by ideas of post-independence and liberation pedagogy or peace education theories, would like to see LLL morphing into a vehicle that empowers people (especially women) to practice active democratic citizenship or informed critical citizenship, bringing about a civil society and a participatory democracy (Osler's & Starkey 2001; see also contributions in Abdi & Kapoor 2009, particularly Semali 2009).

Another perspective has been offered by a group of researchers that began to investigate the fact that “models of political economies and welfare state regimes exist which affect the direction and outcome of education policies” (Schuetze & Casey 2006:285). Research on such linkages is mainly inspired by the canonical work on welfare regimes in the 1990s, prominently associated with Esping-Andersen's (1990) *Three Worlds of Welfare Capitalism*.
Using Esping-Andersen's analytical apparatus, educationalists have begun to look for consistent regimes in education systems. Green (2006) folded up Esping-Andersen's blueprint over OECD members' educational landscape and drew similar borders. Just as welfare regimes can be divided into three clusters each representing a specific group of exemplary countries, educational systems, learning regimes or knowledge societies (used

[5] For disambiguation: Rivera's (2006) cultural approach equates to the social justice model above.

interchangeably in the literature) equally follow a similar pattern of Nordic, core European and Anglo-Saxon clusters.

A first group consisting of Anglo-Saxon countries (Australia, Canada, Rep. of Ireland, New Zealand, USA, UK) displays high income inequality, low public expenditure on education, small proportions of the workforce in high skilled jobs, low performance and high variance (in terms of equality) in adult literacy surveys. Moreover, performance and equality of performance are similarly patterned in PISA results.

The middle ground would be populated by continental European countries with moderate performance, joblessness and participation rates.

The other end of the continuum is marked by a group of Nordic countries (Denmark, Finland, Iceland, Norway and Sweden). Here, high wage equality meets with high public social (and educational) expenditure with almost half of the population working in high-qualification jobs (41 % for the core EU cluster and 35.5 % for the Anglo-Saxon). Above-average results can be confirmed for both adult and youth education performance tests (IALS and PISA) as well as the highest rates of participation in adult educational programs for people between 16 and 65 years (more than half of the population by the end of the 1990s).

Esping-Andersen's ground work and Green's extended analysis do not only offer another dimension (the welfare context), they also touch upon other approaches that have already been applied in the study of global social policy developments. Deacon (2007) has transposed national social policy models into international organizations' positions towards social policy sketching a global class struggle. We will see how this can be relevant for this study in Section 2.1.2 below.

Taking together the main dimensions in the general body of literature on LLL and the more specific contributions on models of LLL, we can discern seven dimensions: (1) the purpose of lifelong learning (social equality, personal development or employability). As we saw, it is common to depict purposes in antagonistic, incompatible terms with social equality at one pole of the continuum and market models at another. (2) the educational actors (from the state to the individual). Here, cleavages between purposes replicate, in that strong public interventions are often seen as not commensurable with a strong markets. (3) the governance of educational systems (from regulating to providing education) is often left implicit by defining actors' roles. Arguments revolve around who regulates, funds and provides education and learning opportunities. (4) the learning settings (formal, non-formal and informal). All agree that LLL puts a premium on the integration of all learning types. What often remains implicit, or already taken for granted, is (5) the educational sector or learners' life phase. To be certain, virtually all contributions place LLL into adults' lives. As a more contextual category, we can also add (6) the welfare arrangement in which LLL might be embedded. This latter category also hints at the more historical and "ideational" contexts from which a specific type of LLL is more likely to emerge.

Table 1.1: Dimensions of lifelong learning models (own account)

Purposes	Actors	Governance	Settings	Sectors	Welfare regimes
emancipation personal development employability	learner state market employers	regulation provision funding	formal non-formal informal	adult education higher education ECCE	universalist corporatist residual

The dimensions or categories – if taken together – might provide some pillars of an eventual analytical framework of how to investigate LLL. Yet, at the same time, it has to be used with caution since most models are deductive and predefined and might foreclose which LLL is seen from the perspective of the internationally-operating organizations analyzed in this work. I will return to these critical implications in Chapter 2.

1.2 Lifelong learning and national education policy

While what analytical level the conceptual work from the previous sections applies to often remains implicit, we can draw on empirical work from global policy research to further specify possible implications of reforms initiated in *national education systems* in the name of lifelong learning. Instead of presenting particular country case studies, I will focus on the scope and outcomes of the *international* diffusion of the concept.

1.2.1 The diffusion of an idea

It is the merit of Jakobi's (2006) work to have shown that both the idea of LLL and the reforms associated with it have spread worldwide. Despite earlier work on lifelong learning in the 1960s, initiated by UNESCO, the Council of Europe and the OECD (see Section 1.3.1), the concept did not resonate with national states' policy agendas. While less than 5% of analyzed countries mentioned the idea in their policy reports at that time, the increase in the early 1990s is considerable with more than 60% referring to LLL. Since then almost 80% (or 99 countries) have mentioned the idea at least once in their reports delivered to the UNESCO world conferences.

Table 1.2: Diffusion of the idea of lifelong learning (Jakobi 2006:73)[6]

	1971*	1993/94	1996	2001	2004
Percentage of countries referring to lll (1996-2004 cumulated)	4.41	38.36	60.5	74.6	79.8
Countries analysed (1996-2004 cumulated)	136	73	43	71	99
Number of countries referring to lll	6	28	27	37	59
Percentage of countries referring to lll	4.41	38.36	60.5	72.5	72
Countries analysed	136	73	43	51	82

*refers to data around 1969
Sources: Policy reports of various years, own calculations

What we can see is that the rise of lifelong learning, which in the literature has often been confined to OECD countries, is worldwide. Apparently, LLL has become – at least as an idea – a global phenomenon. The notion of *idea* deserves further attention. Examining numerous national policy reports, Jakobi (2006a) identified six different substantive and contextual categories of LLL:

(1) awareness
(2) foundations
(3) background
(4) adult education
(5) competitive workforce
(6) other such as literacy, family education, higher education

In the (1) case, states seek to raise the *awareness* among their citizen that knowledge becomes more important in modern economies. Such statements do not specify how LLL policies might look and remain rather superficial in their message.

In a (2) type of statement, countries declare that they want to strengthen the *foundations* for LLL. This can happen at different educational levels. Sweden mentions ECCE and Norway speaks of basic education, while Belize and Botswana refer to secondary and vocational education.

[6] Data excludes countries that do not report in English. Further, for methodological reasons (coding and wording of lifelong learning) only data from 1996 to 2004 are robustly comparable.

For LLL to (3) serve as a *background concept* countries had to state that it is the “principle of their education system” (Jakobi 2006a:119). These principles can be seen as goals attached to education or as elements woven into laws and development programs.

In a (4) interpretation, countries understand LLL as a synonym for *further* or *continuing* education. In Kuwait, for instance, a network of educational institutions (ministries, universities etc.) provides post-basic education in Islamic studies, sciences, language and history.

LLL is also (5) framed in terms of *competitiveness* in the knowledge economy. Korea equates to the “lifelong learning society” with “high quality human resources” and the Estonian Law on adult education is seen in the context of permanent change and economic development (Jakobi 2006a:122).

The (6) category includes meanings of LLL that can mostly be found in less industrialized countries. Here, LLL is non-formal education (Angola), literacy (Chad, Iran) or access to higher education (Sudan).

Although Jakobi’s qualitative analysis of these policy reports is only tentative in an otherwise quantitative design, it nonetheless reveals a glimpse of the fact that LLL may mean different things to different countries and areas. It also warns against attributing to much premature validity of LLL definitions, such as those introduced in the preceding sections.

1.2.2 The diffusion of reforms

In addition to the *idea* of LLL, Jakobi (2006) examined national educational *reforms implicitly* linked to the concept. As noted above, she assumed that countries would implement LLL as defined along the lines of three educational sectors: pre-primary, tertiary and adult education. For pre-primary education, she identified reforms in 20 countries that introduced compulsory ECCE legislation, curriculum and other minor initiatives such as action plans, educator training schemes and the establishment of ECCE centers.

With regard to higher education, 21 countries passed new laws, initiated new programs and established new institutions. The overall objective of these measures was to raise participation in higher education by improving access, increasing financing and facilitating the foundation of private institutions

Most activities that can be linked to LLL can, however, been found in adult education. Jacobi (2006: 76) identified at least three innovations in the adult education sector. First, she demonstrated a global diffusion of *qualification frameworks* since the 1990s that stimulate, categorize and assess learning in adult life. They aim at more transparency in individuals' qualification, reducing the mismatch between labor markets and education and allowing for more international mobility. The first qualification frameworks emerged in the early 1990s[7]. Table 1.3 gives a time line for the introduction of qualification frameworks and related schemes.

Table 1.3: Diffusion of national qualification frameworks (ILO 2005; Jakobi 2006; ILO 2010)[8]

Country and scheme	Year of introduction
New Zealand *National Qualification Framework*	1990
Malaysian *National Skills Qualifications Framework*	1993
Australian *Qualifications Framework*	1995
South African *Qualifications Authority Act*	1995
Chilean *Competence Framework*	1995
UK (Scotland) *Qualifications Framework*	1998
Irish *Qualifications Act*	1999
Singapore *National Skills Recognition System*	2000
Mauritius *Qualifications Authority Act*	2001
Maldives *National Qualifications Framework*	2001
French *Qualifications framework*	2002
Philippines *Framework*	2003
Vanuatu Q*ualifications Framework*	2005
Albania *Qualifications Framework*	2006
Malaysian *Qualifications Framework*	2007

The table only lists those countries whose activities are based on legally-binding jurisdiction. That means excluding a wide array of countries whose activities are closely related to qualification frameworks (like competence-based training schemes) or are only at the stage of design and development. The latter category refers to virtually all European countries which are part of the European framework activities (CEDEFOP 2009).

Secondly, there have been *regulative efforts* and *programs* to put LLL into practice. Countries such as Japan, Estonia and Australia introduced *Lifelong Learning Laws* that

[7] There were pilot projects in Scotland by the early 1980s, but these did not merge into a fully-fledged framework (ILO 2010).
[8] Jakobi (2006) shows the diffusion until 2003. All later framework initiatives have been complemented by me based on the sources mentioned.

guarantee adults to continue their studies, establish a more specific educational administration and widen the learning options for participants.

A third measure consists of new *funding* mechanisms for adult learning. Countries like the UK, the Netherlands or Brazil (with the help of the Inter-American Development Bank) have established learning accounts and new funding schemes to increase participation.

To conclude, the diffusion of the idea is not paralleled by a similar diffusion of real policy efforts. While 99 countries refer to the idea, only 51 allow reforms to follow. This might indicate a methodological pitfall in Jakobi's work. She presupposed a correlation between the idea referred to by the countries and subsequent reforms initiated. However, reforms can only be reported for 51 countries (out of 99), and in only 5 countries reforms can be found in all three sectors. At the same time, 35 countries do not mention LLL, but passed reforms (Jakobi 2006:98). Her *a priori* definition was either inaccurate, LLL is too broad an indicator for concrete reforms or – and it is surprising that she does not take this into further consideration – LLL may be an example of *decoupling*, i.e. the detachment between formal structure and actual activity. I will show below what this can mean in the context of international actors.

However, what is important is that the sample is highly diverse, including poor and rich countries alike. Indeed, the area a country is located has no effect on the diffusion of either the idea or the reform. Similar results can be found for countries' economic situations. Only limited causal effect can be attributed to economic pre-conditions (size of service sector and GNI) in explaining the diffusion of the idea (Jakobi 2006). We will see in the following sections what other factors might instead help us in explaining the diffusion of LLL.

1.3 Lifelong learning and international organizations

Throughout their history, lifelong learning and earlier concepts of education across the lifespan have been intimately linked to the activities of international organizations, both governmental and non-governmental. The following sections will take stock of what we know about their role in promoting LLL from the 1960s until today. Additionally, those theoretical approaches are introduced that attempt to do justice to the growing importance of IOs in education.

1.3.1 Early models of lifelong learning

As mentioned earlier, LLL cannot be seen as a completely novel idea, particularly in light of much older debates in adult education in the late 19th and early 20th century and which could easily be linked to LLL, even more so given the adult educational focus in many contemporary discussions on LLL (see above). More importantly, the 1960s and 1970s saw the introduction of three concepts – *permanent education*, *lifelong education* and *recurrent education* – proposed by three different international organizations – the Council of Europe, UNESCO and OECD. They are usually considered conceptual precursors of the current LLL concept (Tuijnam & Boström 2002; Jakobi 2006; Dewe & Weber 2007).

Permanent education: the role of the Council of Europe

Grosjean (1994) mentions the third Standing Conference of European Ministers of Education in Rome in 1962, under the auspices of the Council of Europe (CoE), as the first occasion where an explicit reference to LLL – under the label of *permanent education*/ *éducation permanente* – was made on an international (intergovernmental) scale. What followed was almost ten years of conceptual work at the European level (including 13 countries) producing an initial position paper (CoE 1969), a compendium of 15 studies (CoE 1970), the corresponding synopsis (CoE 1971a), a subsequent conceptual condensate *Permanent Education. Fundamentals for an Integrated Educational Policy* (CoE 1971b) and a *General Commentary* putting the systemic changes associated to permanent education into a more socioeconomic context (CoE 1971c).

As a more comprehensive interim result, *Permanent Education. The Basis and Essentials* can be seen as where practical policy recommendations sit alongside more pedagogical reflections (CoE 1973).

The 1970 compendium *Permanent Education. Future Shape* claimed to usher in a "new beginning in European educational history" (CoE 1970:5) and sketched the future of education as composed of four intertwined cornerstones:

(1) "Basic education, forming the trunk of
(2) vocational education, which would evolve into
(3) recurrent education (further training, refresher training, retraining) which would develop from the
(4) shaping of life to a cultural pattern." (CoE 1970:5)

Interestingly, this manifesto introduced a wide array of terminology, which later formed the basis for distinction among CoE, UNESCO and OECD by referring both to the idea of *recurrent education* and *lifelong education* as well as *lifelong learning* in the context of Scandinavian experiences (ibid.:6-7). Although vocational training is a centerpiece in the paper and the theoretical departure is a functionalist one, the overall character of this document is that of lofty goals built around a "universally valid educational ideal", an "increase in legitimate freedom" and the help to find "our personal vocation" (ibid.:6).

Less august and more pragmatic sounding, *Permanent Education. Fundamentals for an Integrated Educational Policy* resembled more an exercise in taking stock of what individuals and societies need in light of fast “dwindling know-how”, […] automation or […] synthetic products” (CoE 1971b:5). Remedies were proposed in the guise of more flexible and individualized high-school and university education, innovations in vocational training such as unit or credit systems and the recognition of non-formal and informal achievements.

Even more elaborate was 1973’s *Permanent Education. The Basis and Essentials*. The document attempted to embed the CoE approach to education into a broader societal context marked by an imminent post-industrial organization of labor and an ever- faster production of knowledge, clearly resonating with Bell's (1973) *The Coming of Post-Industrial Society*.

Measures to meet these challenges include the reconsideration of curricula based on research, individual and community needs, taking into account “psycho-social technology” that replaces examination by evaluation, “new adult education” that turns adult education into a “tool for social change” and “educational technology” that harnesses innovations like multi-media methods and programmed learning (CoE 1973:35-55). While left obscure in the preceding documents, financing was now being shed light on. Among the main recommendations, the reader finds a general increase in national education budgets, the establishment of “general security systems for education”, individual contributions and educational leaves (ibid.:49). The latter was backed one year later by the International Labour Organization (ILO) convention on paid educational leave, an early example for interorganizational inspiration (Schuetze 1992).

After these years of conceptual elaboration 25 pilot projects were launched in the fields of basic education, secondary and tertiary, as well as adult education, the evaluation of which followed in 1976 (CoE 1976). In the case of adult education, projects were initiated for vocational training, community centers and study circles, cultural advancements schemes, civic and political education – all regarded as cornerstones of permanent education. The report concludes – with the economic crisis and the then emerging ecological discourse looming large – that permanent education needs to be understood as a “social welfare factor” and not just a contributor to economic growth (CE 1976:124).

The pace at which the Council worked and reported on LLL concepts slowed down considerably towards the end of the decade and would only regain momentum in the 1990s – a pattern that can also be found in other organizations discussed below. The last substantial contribution by the CoE to the now international debate can be found in the 1976 document with the telling title, *Final Report*. This report can be seen as a recapitulation of more than 10 years conceptual and project work. The Council remained true to itself until the end, using the same language as before to describe the blessings of permanent education, still supposed to be manifest in "individual advancements", "cultural democracy" and "globalising education"[9] (CoE 1978:16-23). The late 1970s were also the time where the Council of Europe moved closer to the European Community. Bertrand Schwartz, one of the main authors for the CoE publications mentioned above, was co-author of *The Development of Permanent Education in Europe*, which can be seen as the first genuine contribution to the discussion by the European Commission (EC 1980).

Lifelong education: the role of UNESCO

Almost at the same time as the Council of Europe's idea on LLL took shape, UNESCO declared 1970 as the *International Education Year*, overall objective of which was "to mobilize energies and inspire initiatives in education and training (UNESCO 1968:2). Twelve priority themes appeared on the agenda, amongat which was one with a clear reference to LLL, first formulated as "life-long continuing education" (UNESCO 1968:6), then as "life-long integrated education" (UNESCO 1970:7) and, eventually, as "life-long education" in the 1972 report, *Learning to be* (UNESCO 1972). This report – often referred to as the Faure report – was the result of the work of an UNESCO commission led by former French Minister of Education, Edgar Faure, and regarded by many observers as a landmark document for international educational discourse (Gerlach 2000; Tuijnam & Boström 2002; Dietsche & Meyer 2004).

The Faure report is marked by its broad vision on world education encompassing rich and poor countries, the full range of education (from preschool to adult education) and formal and informal learning, not to mention the related social and economic developments affecting education systems throughout the world. In this report, lifelong education is praised as a "master concept for educational policies" (UNESCO 1972:182) and a primary goal ranking alongside such other objectives as world and individual development, and the spread of democracy.

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[9] *Globalization* in this context does not describe the phenomena of internationalization or transnationalization, but is borrowed from the French context where it is analogous to *holistic*.

The report was to kick off a broad debate on the new educational paradigm. The 1972 Third International Conference on Adult Education (CONFINTEA) in Tokyo[10] equated the "new integrated education system" with lifelong education and recommended that UNESCO spearhead the spread of lifelong education as an organizing principle in all member countries (ICAE 1972:45-47).

The 1974 *Revised Recommendation concerning Technical and Vocational Education* saw its educational sector policy as part of a "lifelong process" (UNESCO 1974:3) and clearly echoes some key ideas that can originally be found in the Faure report, such as the "facilitated transition between education and employment at whatever level or stage" (UNESCO 1974:16).

Increasing interest in the idea of lifelong education at that time is also reflected in the UNESCO Institute for Education (UIE) and its journal the *International Review of Education*. Hubermann's *Looking at Adult Education from the Perspective of an Adult Life Cycle*, in the review's second issue of 1974, clearly centers on LLL themes, such as the increased capacity of the adult mind, the insufficiency of a focus on front-loaded learning and the importance of non-formal learning beyond school and university (Hubermann 1974). The same year, the *Review* dedicated a special number to *Lifelong Education and Learning Strategies* that were – according to the guest-editors – marked by "flexibility, diversity, universality and dynamism" (Dave & Lengrand 1974:427).

Two years later, UNESCO stated in its *Recommendation on the Future of Adult Education* that adult education "is a sub-division, and an integral part of, a global scheme for life-long education and learning", with the latter denoting "an overall scheme aimed both at restructuring the existing education system and at developing the entire educational potential outside the education system (UNESCO 1976:2).

The recommendation as a whole can be seen as a thorough attempt to conceptually establish adult education as an integral part of the new lifelong education system. Nor does it stop at sketching out how to tie adult education to other educational sectors, but rather also gives a detailed account on possible contents, methods, evaluation and funding schemes.

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[10] Although the final report of CONFINTEA does not explicitly mention the Faure report, key statements and terminology in both reports are of great similarity. Since both reports were published in August 1972 and the conference was convened by UNESCO, it can be assumed that there was a certain degree of conceptual collaboration beforehand within the UNESCO frame.

The year 1976 can be described as the peak point of the UNESCO-stimulated debate on lifelong education, culminating in Dave's (1976) *Foundations of Lifelong Education*, laid out on behalf of the UIE. In her article she takes stock of what educationalists had so far contributed to the discourse and provides an exhaustive definition of lifelong education:

(1) “The three basic terms upon which the meaning of the concept is based are life, lifelong and education.

(2) Education does not terminate at the end of formal schooling but is a lifelong process.

(3) Lifelong education is not confined to adult education but it encompasses and unifies all stages of education – pre-primary, primary, secondary and so forth. It thus seeks to view education in its totality.

(4) Lifelong education includes formal, non-formal and informal patterns of education.

[5. 6. 7. 8. 9.] . . .

(8) Contrary to the elitist form of education, lifelong education is universal in character. It represents democratisation of education.

(9) Lifelong education is characterized by its flexibility and diversity in content, learning tools and techniques, and time of learning.

[12. 13. 14. 15.] . . .

(16) Lifelong education carries out a corrective function: to take care of the shortcomings of the existing system of education.

(17) The ultimate goal of lifelong education is to maintain and improve the quality of life.

(18) There are three major prerequisites for lifelong education, namely opportunity, motivation and educability.

(19) Lifelong education is an organising principle for all education.

(20) At the operational level, lifelong education provides a total system of all education.” (Dave 1976:51–52)

Just as in the case of the Council of Europe, the UNESCO debate on lifelong education petered out by the end of the 1970s and would not reemerge until the 1990s.

Neither the *Final Report of the Fourth International Conference on Adult Education*, in 1985 in Paris, nor the 1989 *Convention on Technical and Vocational Education* struck the same solemn tone with regard to the potential of the lifelong education concept as did previous reports and conventions. Although the former nominally mentioned the concept, recommendations and the final declaration at the conference did not, or only very reluctantly (UNESCO 1985). The term *lifelong education* appeared only once in the convention.

Fading interest is also mirrored in the UNESCO-edited *International Review of Education*. 1982 was the only year that saw a clear contribution to the debate, in the special issue *Formal*, *Nonformal and Informal Structures of Learning* containing, for example, La Belle's *Formal, Nonformal and Informal Education: A Holistic Perspective on Lifelong Learning*, where a terminological and conceptual shift from *education* to *learning* can be noticed for the first time. Interestingly, Manzoor Ahmed – guest-editor of the issue – entitled his introduction *Putting into Practice the Perspective of Lifelong Recurrent Learning* and, by using the term *recurrent*, bridged (at least terminologically) the subtle divide that had, up to that point, separated UNESCO from the OECD.

Recurrent education: the role of the OECD

The OECD, too, began working on LLL concepts in the late 1960s. The term *recurrent education* was first introduced by Olof Palme, the then Swedish Prime Minister, at a meeting between OECD education ministers in 1969. He picked up the concept from a Swedish commission convened to table proposals for the reform of the Swedish education system (Jakobi 2009). Their recommendations were built on the idea of alternating periods of learning and working throughout life. This basic principle resounded in the OECD report *Recurrent Education – A Strategy for Lifelong Learning*, where *recurrent education* is defined as

> […] a comprehensive educational strategy for all post-compulsory or post-basic education over the total life-span of the individual in a recurring way, i.e. in alternation with other activities, principally with work, but also with leisure and retirement." (OECD 1973:16)

Similar to UNESCO's Faure-Report, this OECD paper marked the beginning of an accelerated preoccupation with LLL issues (Papadopoulus 1994). While the CoE and UNESCO did view LLL as a new organizational, transformative and emancipatory principle for burgeoning post-industrial knowledge societies, the OECD perspective was more labor-oriented. The same goes for its implementation strategy. Contrary to the approach pursued by the CoE, which launched a series of pilot projects, the OECD published various country reports from 1972 to 1977. Unlike the country reports issued by the OECD today, these country-specific assessments were penned by individual scientists and reflected more their personal opinion (often short and sharp). Comparisons and best practices were spared, direct consultation with the country in question was rather the exception; something that can also be said for the formulation of recommendations.

The cautious manner with which the OECD issued policy proposals was soon to be criticized by countries (above all, the British government) full of expectations raised by the lofty tone that reigned within the international domain at that time. At the 1975 European

Education Ministers Meeting in Stockholm, following the publication of *Recurrent Education – A Strategy for Lifelong Learning*, those claims were taken seriously and the OECD tabled a more detailed catalog of measures, e.g. the establishment of commissions, educational leave or the modification of admission to institutions in certain education sectors (OECD 1975; OECD 1976).

The OECD did not completely abandon work on LLL in the 1980s, the enthusiasm and the hope associated with it before did, however, fade away (Tuijnam & Boström 2002). The early 1980s saw two conferences on LLL funding. In 1986, the report, *Recurrent Education Revisited*, identified three crucial questions that would need to be tackled in the future: (a) the question of participation, (b) how to reconcile labor market structures and recurrent education and (c) how to fund LLL programs and guarantee sustainability (OECD 1986).

However, the received wisdom at that time was that it would be cheaper to increase expenditure in the traditional, “front-end” education sectors than to build up an LLL system “from scratch” or to profoundly refashion the established models towards a recurrent, permanent or lifelong education system (Bengtsson 2009). To traditional educators, cost-conscious politicians and economists following human capital assertions, returns on educational investments are the greater the earlier they are done. From this point of view, investments in education taking place late in life are the least profitable measure to take compared to the primary and secondary sectors for which funding grew considerably in the 1970s and 1980s (Schuetze 2006).

The 1986 report reflects the changed climate in which OECD policy debates took place: overshadowed by the second oil crisis, stricter austerity policies and a general skepticism towards “welfarism”. The organization, therefore, proposed that, in the future, LLL should be discussed with “dampened enthusiasm for all-embracing, prophetic reports and greater interest in practical aspects of recurrent education reform” (OECD 1986:5).

Table 1.4 compiles the most salient proposals encased in each organization’s learning model.

Table 1.4: Comparison of early lifelong learning models (own account)						
	Concept	**Objectives**	**Mode of learning**	**Curriculum**	**Target groups**	**Key documents**
CoE	Permanent Education	social integration and reform (collective) identity formation vocational qualification	system of flexible formal and non-formal study units	comprehensive (civics, humanities, vocational)	mainly students above primary education, workers	Permanent Education. Future Shape (1970) Permanent Education. Fundamentals for an Integrated Educational Policy (CE 1971) Final Report (1978)
UNESCO	Lifelong Education	deschooling emancipation of former colonies balance between vocational and “learning to be”	integration of informal, non-formal and formal learning	comprehensive (life skills, civics, humanities, vocational)	pre-school to post-school students and workers	Learning to be (1972) Foundations of Lifelong Education (1976)
OECD	Recurrent Education	individual mobility occupational flexibility integration of education with active life	alternating phases of work and formal education recognition of non-formal and informal learning	vocational	students and workers above upper secondary education	Equal Educational Opportunity:A Statement of the Problem with Special Reference to Recurrent Education (1971) Recurrent Education – A Strategy for Lifelong Learning (1973) Recurrent Education Revisited (1986)

1.3.2 Theoretical approaches to global educational governance

It was only in the mid-1990s that the idea of lifelong learning re-emerged.[11] This time, however, in an environment markedly different from that of the 1960s and 1970s. Not only did national policy-makers now believe more fervently in the economic importance of

[11] The idea did not completely disappear (Lee, Thayer & Madyun 2008). Compared to the 1970s and the mid-1990s, however, the 1980s have been regarded by many observers as less important (Dehmel 2006; Jakobi 2006).

education in an allegedly ever more knowledge-based economic system (Jakobi 2006), but education had also become an issue area of global governance. Perhaps the most clear expression of this new (now global) environment occurred in 1990, when 1500 participants representing 155 governments, 33 intergovernmental organizations and 125 non-governmental organizations came together in Jomtien, Thailand, to accept (by acclamation) the World Declaration on Education for All at the first World Conference on Education for All (WCEFA). One consequence of this broad initiative might be that, in the period from 1995-2012, overall education funding[12] increased by almost 10 billion US$ from 2,3 billion to more than 12,2 billion (OECD CRS 2014).

As a response, social science scholars have started to take note of these developments proposing concepts such as "pluri-scalar governance of education" (Dale 2005), "educational multilateralism" (Mundy 2007), "international educational regime" (Parreira do Amaral 2011) or "organizational field of education for development" (Chabbott 2003). This section intends to introduce the theoretical approaches capturing the globalized education sector and its actors.

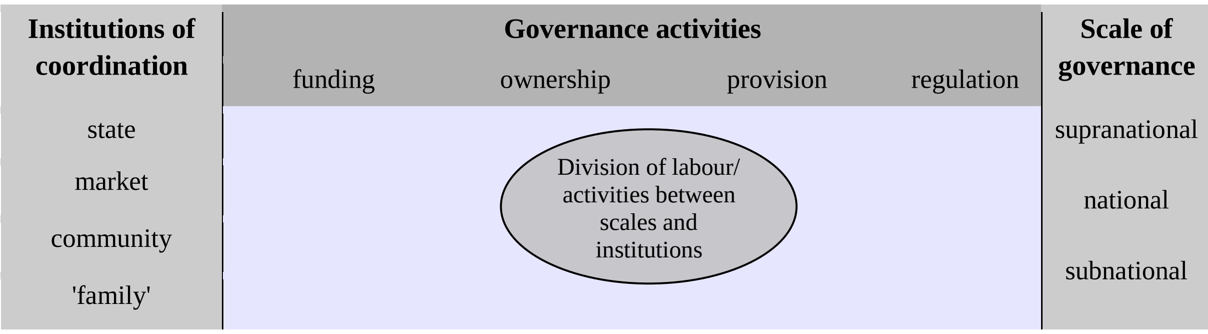
Pluri-scalar governance of education

One salient example stemming from education (and not from political science) to tie governance concepts and educational matters together has been delivered by Dale (2005). He identifies a "developing functional, scalar and sectoral division of the labour of educational governance" (ibid.:132). In his pluri-scalar model of education governance, Dale describes three *scales of governance* (subnational, national, supranational), four *institutions of coordination* (state, market, community and family) and four *governance activities* (funding, ownership, provision and regulation).

He proposes his model as a starting point for comparative researchers to structure their analysis beyond the premises of methodological nationalism (see below). For Dale, the globalization of education is not a zero-sum game, but can lead to a new division of activities on different scales.

[12] Including all educational sectors and all donors (bilateral, multilateral and private).

Figure 1.5: Pluri-scalar governance of education (Dale 2005; slightly modified)



What activities (and education sectors) remain national are, Dale argues, dependent on their relevance for societal cohesion. The more they are relevant, the more likely they will remain funded, owned, provided and regulated by the state. In sectors less important for national identity and social order, but with more relevance for the global knowledge economy, the chances are greater that those sectors (high school and adult education) drift towards higher scales and institutions other than the public ones. Dale applies his framework only to the EU where he (2005:136) observes the emergence of a

> "European KnELL (Knowledge Economy and Lifelong Learning) sector that overlaps with but is separate from and not reducible to the institutional forms, discourses and practices of any individual national education sector or any combination or distillation of them."

His analytical matrix is useful, as it provides new perspectives on how to rethink educational planning and organization in a globalized world. At the same time, it remains unclear what such changes mean for the content of education and it equally remains to be seen if his contribution captures all the activities exerted by the various actors in this new constellation.

Educational multilateralism

Educational multilateralism was proposed by Mundy (2007) to explain why international organizations emerged in education and why they matter in the analysis of educational governance. Relying on Ruggie's (1992:57) definition of multilateralism as any institutional form that "coordinates relations among three or more states on the basis of generalized principles of conduct", she assumes that IOs interact with the nation state system by opening "a new venue for political contests over shared norms and institutions" (Mundy 2007:20).

She distinguishes between three phases of multilateralism after WWII: (1) embedded liberalism, (2) neoliberal multilateralism and a (3) phase which is characterized by a series of governance experiments and whose contours are only now about to take shape. In each of those periods, tensions between redistributive or compensatory and strategic or competitive goals fueled much of the conflicts between IOs (and, within these), states and non-governmental actors.

The (1) phase (1945-1980s) was marked by efforts to consolidate both national sovereignty and the Keynesian welfare state. Further, IOs created in the aftermath of WWII were in this sense guardians of both a stable world economy and a social compact that consisted of "notions of citizenship based on rights, redistribution, and entitlement, the right to employment, education and health care" (Mundy 2007:20). Against the backdrop of the Cold War, OECD and Soviet countries used educational aid for development as an instrument to tighten geopolitical alliances. Organizations such as UNESCO and OECD and financial instruments such as bilateral aid, provided the stage for contests between a direct redistribution model (Soviet bloc) and a model of public provision of education as an equal opportunity model (the West). Research that either focused on the global diffusion of homogenous schooling through IOs as a world cultural institutionalization process (as in sociological neoinstitutionalism; see Chapter 3 below) or on the cultural imperialism and expansion of capitalism through educational development cooperation might have merit in describing the causes and effects of educational multilateralism, but they missed the chance to carve out that something that would not emerge until the 1980s and which Mundy (2007:25) calls an "active political arena at a transnational scale." Bilateral aid agencies, the OECD and the World Bank as well as regional IOs – to mention some – started to pay heed to educational matters, although it was not part of their formal mandate.

The (2) period (1980s-1990s) was marked by changes in the world economy, the geopolitical landscape and the incorporation of neoliberal convictions in many key states and IOs. As one consequence, bilateral aid to education fell dramatically, support of the UN system was curbed (the USA and UK even withdrew membership from UNESCO) and the World Bank – in the middle of the structural adjustment era – became the largest single funding institution of educational aid. Other new and old organizations such as the OECD, WTO and the EU took ever more interest in education with a similar menu of neoliberal policy recommendations. The normative consensus that emerged, despite the strategic conflicts in the period following WWII – redistribution and equality through education – became replaced by a new (instrumental) view on educational funding.

This is about to change again (3). The set of non-national actors – Mundy states – has further grown, now including above all civil society actors (professional associations, teachers' unions and so on), which seem a return to a more redistributive and rights-based approach to education on the political agenda. Further, other actors, including the World

Bank, have stepped back from their purely economistic approach to educational planning.[13] In the offing would be “a kind of a global 'third way' […] where goals of productivity and social equity go together” (Mundy 2006:192).

Her work is interesting as it situates the content of educational policies and the interactions between political actors into the wider political order that emerged after WWII. Her (2007:31) observation that IOs can be seen as “arenas in which contests over re-embedding educational provision in new forms of social compact are played out” resonates with conflict theory approaches in social policy studies. However, she is mute on issues of emergence, diffusion and behavior of these actors and their ideas and her analytical apparatus to look at trends of global (instead of regional) phenomena is undercomplex.

International educational regime

Another approach to capture the internationalized complexity in education uses *international regimes*. They are commonly defined as

> “[...] sets of implicit or explicit principles, norms, rules, and decision-making procedures around which actors' expectations converge in a given area of international relations.” (Krasner 1983:2)

Regimes as an analytical unit can be considered useful to grasp many of the activities in “bread-and butter politics” consisting of regulating specific transnational problems, from the ecological questions of how to best protect rivers and seas to economic treaties regulating global trade.

According to Parreira do Amaral (2011), education, too, has recently become organized in an international regime. Manifold actors are supposed to be interconnected in this regime based on cognitive elements (principles, norms and procedures) and on institutionalized rules (mechanisms and instruments of governance).

Among those members, Parreira do Amaral (2011) theoretically distinguishes between international, transnational, governmental and non-governmental actors. They are organized in an implicit or tacit regime, that is to say, a regime characterized by a low degree of formal institutionalization, but a high degree of convergence in expectations. Parreira do Amaral mentions forums (such as the Global Forum on Education initiated by the OECD),

[13] Mundy (2006a) takes the end to the WB's promotion of educational user fees as a telling example.

conferences (such as the regular world conferences on education organized by UNESCO), broad initiatives (such as EFA) and international comparative studies (PISA), which all point towards an increasing institutionalization of education at the international level, even in the absence of any formal treaty (a feature similar to other regimes, like nuclear weapons, for example).

Besides the degree of institutionalization and shared expectations, the international educational regime can also be classified in terms of its development stage. Levy, Young and Zürn (1995) distinguish between (1) agenda formation, (2) institutional choice and (3) operationalization. Parreira do Amaral (2011:143) holds that the education regime has already reached the stage of institutional choice after several post-war decades during which the educational goals had been successfully established on the global political agenda. It would now be time to negotiate the contents of the agenda. Here, the author deciphers the sometimes contradictory aspects of education as a human right and part of citizenship on the one hand and human capital theory and the transformation of education into a commodity on the other.

Parreira do Amaral (similar to Mundy's approach above) remains largely discrete about why a certain understanding of education becomes dominant and what is the exact role of the various actors. Among these, states are still in a central position. More importantly, his analysis takes the functionality of regimes for granted. We will see in Chapter 2 why this can become problematic in the study of LLL diffusion.

Global organizational field of educational development

Highly relevant for this study is Chabbott's (2003) work on – what she calls – the *global organizational field of educational development*, with the latter being understood as "systematic efforts to improve education systems in order to support more general socio-economic development in less industrialized countries" (Chabbott 2003:15).

Tracing international educational conferences from the post-WWII period until the WCEFA in 1990, she (ibid.:66) identifies two types of organizations: "(1) those able to produce scientized rationales for implementing development one way and not another and (2) those able to work the grassroots." While the former are represented by the wide array of multilateral and bilateral intergovernmental organizations (including regional organizations, development banks and funds and development agencies), the "grassroots" comprise international non-governmental organizations and private philanthropic organizations as well as training and research centers.

Following the tenets from neoinstitutionalist organization studies (see Chapter 3) she identified “belief systems” (Scott 1994) that bind together the components (actors) of the organizational field. These belief systems take the form of dominant themes in international discourses on development in general and the role of education in particular. The then-dominating (1990s) themes are inscribed in the Education for All agenda with its strong focus on the inclusion of underprivileged groups, universal primary and secondary education, improvement of educational quality and the eradication of illiteracy. The themes are, in part, also reflected in the Millennium Development Goals, resonating with the wider development consensus on sustainable human development (Table 1.5).

Table 1.5: Themes in International Development and Educational Development Discourses, 1950-1995 (simplified, based on Chabbott 2003)

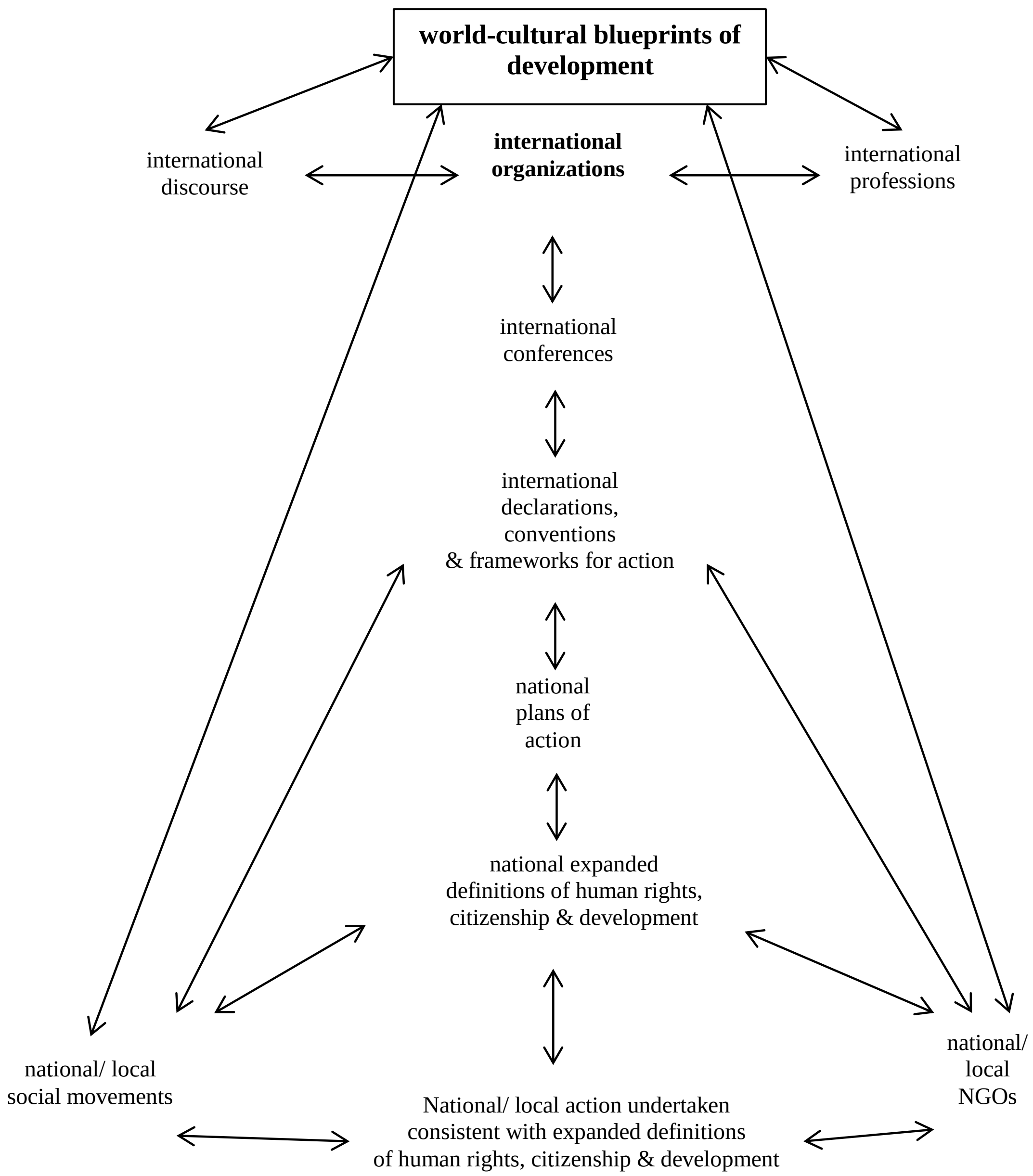
Decade/ Indicator	**Discourse**		**Education Priorities**
	International Development	**Education and Development**	
1950s GNP	economic planning technology transfer community development *deteriorating terms of trade** *import substituting industrialization*	manpower planning fundamental education	formal, primary education technical training rural extension training adult education for health and agriculture
1960s GNP per capita	economic growth stages of development capital accumulation appropriate technology *development of underdevelopment*	stages of educational development human capital theory human resource planning functional literacy	TVT teacher training formal secondary and HE vocational literacy
1970s GNP per capita	poverty alleviation redistribution with growth bottom-up development community-based development basic human needs family planning *dependency* *new international economic order*	equalizing educational opportunity basic education rural development community schools *de-schooling* *cultural imperialism* *conscientization*	“neglected groups“ non-formal education for adults and children agricultural vocational curricula
1980s PQLI LSMS	structural adjustment poverty reduction social dimensions of adjustment decentralization participatory development *dependency development*	human resources development educational effectiveness and efficiency local administration of schooling endogenous education	community financing training for local and regional education administrators
1990s HDI	sustainable human development environmental protection	education for all female education eradicating illiteracy quality learning for all	universal primary and secondary schooling female secondary school scholarships education for special populations classroom pedagogy and curriculum

* italics indicate critique, counter-discourses or alternative belief systems

GNP = Gross National Product; PQLI = Physical Quality of Life Indicator; LSMS = Living Standards Measurement Surveys; HDI = Human Development Index

Despite the absence of powerful alternatives to the dominant thinking in the current development discourse (particularly for education), Chabbott (2003:89), nonetheless, found two highly disputed claims in the field: (1) its "universally applicable scientific knowledge" and (2) its "objective, essentially apolitical decision making". These claims are most powerfully held within those organizations that account for most of the knowledge production in the field in general, more precisely large international organizations like the WB and UNESCO.

Figure 1.6: Constructing and disseminating world cultural blueprints of development (Chabbott 2003)



Knowledge production, she argues, also helps to structure the field into core and periphery. While the knowledge producers (IOs with most of the professional staff working in them, their professional schools, journals and so on) sit at the core, the knowledge users that depend on this knowledge (smaller IOs and INGOs) occupy a more peripheral position. Such a structuration has led to isomorphic processes in positions and practices among highly diverse actors in the field. However, in becoming more similar, Chabbott (2003:92) emphasizes that coercive mechanisms (e.g. financial leverage) play a much smaller role than is often assumed in the literature. She, instead, points to normative and mimetic processes and the role of professionals herein to diffuse common development models, common organizational principles and common action frameworks among and across organizations (not only between organizations and nation-states).

The argument of isomorphism is all the more important if considered that in her description world development works in a top-down direction (Figure 1.6). The specific cognitive mechanisms at work in diffusing these blueprints of development include sharing common “project design protocols, strategic objectives, monitoring and evaluation plans, logical frameworks, and other standard operating procedures” (Chabbott 2003:93). Normative organizational influence takes place “[...] when professionals designate some activities as more effective than others and agree upon the “right” ways to pursue those activities” (ibid.).

Chabbott's work is very important in the context of my own analysis for several reasons: (1) her observations about the dynamics in world culture and the ideological discourse on education paint a markedly different picture from that in Mundy's work mentioned above, because she provides insight into an international development agenda that speaks to and for states other than the rich OECD members. Further (2), in drawing on wider historical and cultural explanations (modernity instead of functionality or instrumental interests), she can also explain why and how this field emerged in the last 150 years. (3) she stresses the particular role of both governmental and non-governmental international organizations and the scientized professionals hosted by them in shaping and carrying out educational planning. (4) in stressing the role of educational knowledge, the way it is produced (in the core of the field) and its characteristics (scientized, universally-applicable, objective, apolitical), she touches on issues of diffusion between organizations (rather than between organizations and nation states). (5) treating the diffusion of education as a process of cognitive and normative that is, cultural) diffusion, she points to the possible conflicts within the organizational field and at its borders (where states are situated). These conflicts are cultural ones (instead of struggles over resources or power), inasmuch as they are fought in terms of the relevance and applicability of the knowledge produced. We will meet these arguments again when discussing the analytical framework that guides my own research.

1.3.3 The "big four"

In addition to these mostly theoretical macro-system approaches that sketch the outlines of a new level of educational planning beyond national states, we can find a growing number of small-*N* comparative and case studies that explore what LLL means in the context of specific organizations. Interestingly, almost all attention is focused on a sample made of four organizations: UNESCO, OECD, WB and EU. While educationists focus on the contents and positions proposed by IOs, analysis from more political scientific perspectives uses LLL as a lens through which to identify governance mechanisms.

With regard to UNESCO, many works are confined to one sector within the LLL array, i.e. adult education. Here, findings are somewhat contradictory. Comparing the lifelong education publications from the 1970s with more recent ones, Rutkowski (2007:231) and Schemmann (2007:189) believe that UNESCO has lost much of emancipatory stance it once had, now perpetuating a neoliberal agenda, or at least accepting the primacy of it. Ouane (2009:310), in turn, states that UNESCO "upholds a holistic and integrative view of lifelong learning, giving emphasis to the social and humanistic dimensions, which are not quantifiable in economic terms, such as learning for critical thinking, learning for critical and active citizenship, and intercultural learning." Jakobi (2006) emphasizes the key role of UNESCO in bringing LLL into the general EFA initiative linking ECCE with initial and continuing education, while keeping a strong position on the importance of adult education as expressed in the "one hour a day for learning" initiative promoted at the International Conference on Adult Education in 1997 under the auspices of UIE (now UIL).

For most observers, the World Bank (WB) discovered LLL relatively late. Klees (2002:451) identifies "New rhetoric, old Ideology"[14] in the World Bank's 1999 *Education Sector*

[14] The quote refers to the title of the article.

Strategy. He was one of the first to assess the Bank's newly included approach to LLL, which was mentioned in this report for the first time.[15] After reducing funds for adult education and concentrating on primary education, the report foreshadowed the Bank's turn, four years later, by hinting at the general importance of LLL as adult education. After reviewing the WB's key documents of the mid-2000s, Rivera (2009:289) was sure that adult education in the WB context is only “handmaiden of the market” fostering only “workforce education”. Similar conclusions were drawn by Schemmann (2007) focusing, again, on adult education. In contrast to these contributions, Jakobi (2006) stressed that the WB had repeatedly defined LLL as more than adult education and more than TVET. As a major funder of projects in education, the WB has, nonetheless, started large skills-related programs in Chile and Mexico. More recently, the Bank has stated that it has been involved in promoting LLL since the early 1990s. Jakobi (2006:57) understands this as “reinterpretation of its activities” drawing on the amounts of funding for adult education.

Similar attention has been given to the OECD and the EU. In the case of the former, Papadopolous (1994; 2006) retraces the organization's part in international educational debates to the 1960s. He and other observers seem to agree about the fact that the OECD has made successful efforts to establish its “Performanz-Kultur” (Radtke 2003:277) by “governance by comparison” (Martens & Niemann 2010).[16] Measuring, evaluating, ranking and recommending are thereby the OECD's most effective instruments to strengthen its role in national educational decision-making processes. These instruments are often linked to LLL, although they have also been applied to the traditional sectors of primary and secondary education (PISA most prominently). Similarly, Schemmann's (2007:80) analysis of OECD adult educational positions found that the organization became an influential actor in education policy-making in the 1990s by stressing issues like quality and efficiency along with the monitoring processes for which the organization so boldly suggests itself through its cross-national performance evaluations.

Schuller (2009) – an OECD insider – responded to the critiques against his organization by stressing the long-standing focus on equity in OECD's LLL approach. Almost as an apology, he states that equity concerns are sometimes

[15] As a consequence, much earlier work on the WB's education agenda has been omitted out in this review. See Jones (1997), for instance, on earlier WB work on education.
[16] *Governance by Comparison* refers to the title of the paper.

> "phrased in cold economic terms, that is, economies and societies cannot afford to have a long tail of unskilled and marginal dependents. But this is inseparable from value positions as articulated by most Member countries, who wish also to address the problem of social justice and equal opportunity." (Schuller 2009:299)

More than other organizations, the OECD has made recommendations concerning the financing of LLL. Jakobi (2006) noted a shift from more publicly financed adult TVET to more privately funded learning. More importantly, she identified the OECD as the main causal influence for the worldwide diffusion of LLL. As seen above, economic conditions or geographical area have little effect on the diffusion of the idea. In contrast, OECD membership shows significant effects on both the spread of the idea and (albeit less) on the spread of reforms.

Particularly strong attention has been given to the EU. Jakobi (2006) finds an EU commitment to LLL issues as early as 1993, expressed in the *White Paper on Growth, Competitiveness and Employment*. Observers agree that the early EU stance towards LLL, as exposed in the 1993 *White Paper* and the 1995 *White Paper on Teaching and Learning*, was marked by employability and competitiveness as the main motives for introducing LLL[17], and that, since then, the organization has made efforts to weave in issues of social exclusion, solidarity and active citizenship (Papadopolous 2002; Schuetze 2006). Lee, Thayer and Madyun (2008:455) state that the "EU's ideological coupling of its lifelong learning policy ironically encompassed both neo-liberal (the Anglo-Saxon model in general) and social democratic liberal (the Scandinavian model) agendas since 1997." They interpret this mix, not as the product of national representatives pursuing national interests at the supranational level, but primarily as the outcome of national "political socialization" of EU officials (ibid.), which then feeds back into a supranational policy-making process.

Table 1.6 compiles the activities that have been analyzed in the literature and illustrates the coincidence of IOs' sudden interest in LLL.

Assumptions of cross-fertilization between IOs have been lent further support in other comparative works, which all detect growing convergence within the small samples analyzed.

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[17] Lee, Thayer and Madyun (2008) note, however, that this emphasis was based on a Europe-wide survey among national decision-makers who prioritized these more economic goals.

Table 1.6: Key features of major IOs' LLL work (own account: based on the literature in this section)

Organization	Activity
UNESCO	EFA Jomtien Summit (1990) Publication: Learning. The Treasure within (1996) Hamburg Declaration on Adult Education (1997) EFA Dakar Summit (2000) TVET Recommendation (2001) World Report: Towards Knowledge Societies (2005)
WB	Publication: Education Sector Strategy (1999) Publication: Constructing Knowledge Societies (2002) Publication: LLL in the global knowledge Economy (2003) Projects in Hungary, Romania, Chile (1991-2002) Strategies on Science and Technology, ICT and private education (2001-2002)
OECD	Publication: Lifelong Learning for All (1996) Project: The Role of Qualification Frameworks in Promoting Lifelong Learning (2000-2005) Conference: Co-financing LLL (2003) Working Program 2003-2006 LLL country reviews (1999-2002)
EU	Publication: White Paper on Growth, Competitiveness and Employment (1993) Publication: White Paper on Teaching and Learning (1995) European Year of LLL (1996) Lisbon Strategy (2000) Memorandum on LLL (2000) Communication: Making A European Area of LLL a Reality (2001) Publication: Towards a European Qualification Frameworks for LLL (2005)

Rutkowski (2007) looked critically at WB, OECD and UNESCO, finding only neoliberal polices and concluded that “nearly all major IGOs dealing with education represent an extension of the neoliberal agenda.” Jakobi (2006) looked at the simultaneous emergence of LLL in WB, OECD, UNESCO and EU and later (Jakobi 2007:108) compared WB and ILO, whose positions “converge in a common agenda on the importance of lifelong learning“. Schemmann (2007), in his study, understands LLL as a reform package for the adult education sector. He compares views on and activities of the Bank, the OECD, UNESCO and the EU. Reviewing these IOs' positions on adult education, he (2007:228) finds an UNESCO priority on peace, social justice and democracy and an EU reference on social cohesion and citizenship despite the trend of general convergence to a more instrumental model of adult education, which traditionally has been more associated with the Bank and (though somewhat less) the OECD.

It is important to note that scholarly interest is almost exclusively confined to the big four intergovernmental organizations mentioned above. Occasional references to ILO (Jakobi 2006; 2007) and the Commonwealth of Learning (Daniel 2009) do not change this picture.

Neither does it change if non-governmental organizations are considered. Work on LLL by international nongovernmental organizations has rarely been investigated. Jakobi (2006:66) found only five INGOs in the Yearbook of International Organizations (YIO) that explicitly deal with LLL,[18] of which three are Europe-based: the European Lifelong Learning Initiative, the European Association of Regional and Local Authorities and the European Civil Society Platform of Lifelong Learning. In addition, there is the World Initiative on Lifelong Learning. Most of these organizations are not professionalized or semi-professionalized regarding internal organization and paid staff (ibid). In the diffusion model presented in Section 1.2.1 above, the role of NGOs was considered very marginal.

Tucket (2009) and Duke and Hinzen (2009) provide overviews of the role of non-governmental organizations in promoting LLL as *adult education*. Here, the International Council for Adult Education and the Deutscher Volkshochschulverband international (dvv international; German Adult Education Association) provide adult education “[a]s a result of globalisation, technological change and the development of knowledge and information-based societies […] in developing countries, countries in transition and industrialised countries” (Duke & Hinzen 2009:333). Against the backdrop of these changes, adult education “plays a key role in the process of lifelong learning by offering general, vocational, cultural and academic continuing education” (ibid.). DVV international became more international in its scope in the 1990s, signing “cultural agreements” with partner countries where non-formal education projects (funded by the German Foreign Office or the Office for Development Cooperation) were carried out on issues such as HIV/AIDS, reintegration of ex-combatants, female empowerment, etc. For international trade union confederations or employers' association, which have, in the national context, been important actors, literature review has not yielded any substantial discussion in the context of LLL.

1.4 Conclusion

The previous sections sought to explore what we know about lifelong learning. Science has embraced LLL as a concept that – if condensed into policies – bears the potential for fundamentally challenging the current education system. How LLL might impact upon education systems once states have taken it seriously has been shown in Section 1.1, from a theoretical perspective and, in Section 1.2, from an empirical one: “educationalization” or “pedagogization” of early childhood, overhaul of higher education and the increasing interest

[18] Jakobi (2006) did a quantitative content analysis of an on-line version of the Yearbook of International Organizations with a key word search.

in harnessing knowledge gathered outside the formal education system are all examples of how LLL might penetrate both the contemporary perception and organization of education.

More importantly, the phenomenon is strikingly global in range. Jakobi (2006) has made a case in point showing that, within a decade, the idea of LLL has made its way into a vast majority of nation-states' agendas worldwide, empirically supporting Papadopoulos' (2002:39) statement that the consensus on LLL is “one of the most remarkable features of the education policy discourse, nationally and internationally, in the past decade.”

All the more surprising, then, is the fact that the same globality is not reflected (not assumed?) in the analysis of what has been called an international education regime, educational multilateralism or an organizational field of education (Section 1.3.2). The hypersensitive focus on the “big four” is not without reason since these actors might indeed be very important ones as Jakobi (2006) demonstrates with regard to the OECD.

However, as the theoretical approaches suggest, the picture is much more complex in that it includes actors and types of actors that have so far remained out of scope in education research, especially with interest in LLL. To put it simply, we now know more about lifelong learning at a national level than at an international one. This is a peculiar situation since the concept’s history (1960s-1970s) shows us where it emerged first and most forcefully: a then small, but highly committed, international education sector in the guise of the CoE, UNESCO and OECD (Section 1.3.1).

In addition, the literature provides an opaque analytical lens when using LLL as the analytical point of departure with an *a priori* defined focus on, for instance, adult education, which is the sector of interest in arguably all contributions. This already points to some critical aspects in the literature on LLL in general. Chapter 2 will assess in more detail the assets and limitations of the approaches and studies discussed here against the backdrop of more theoretical arguments. We will see that although helpful in pointing to new avenues of research, many of these contributions share some serious theoretical and methodological shortcomings that need to be overcome if we want to understand what LLL means, how it has become what it now is and how it diffuses.

2. Puzzles and problems

We saw that national states, international organizations and educationalists worldwide (re-) discovered LLL in the 1990s. Despite such omnipresence the abundant literature on lifelong learning extraordinarily obscures the fact that the phenomenon is surrounded by some serious puzzles of which the diffusion of the phenomenon itself, and especially the nature of this diffusion (fast and worldwide), are only the most salient ones (Section 2.1). IOs' role in the global diffusion of educational policies might well have been given more attention more recently, but the specific focus remains confined to a narrow set of organizations and the conceptualizations of governance mechanisms needs to be rethought if we want to understand the substance of what diffuses (Sections 2.2 and 2.3).

2.1 Prevailing approaches to explain the rise of lifelong learning

It is a striking finding that current educational discourses in both more scientific and more political realms share a similar strong interest in lifelong learning. Paradoxical as it may be, this sudden emergence (or re-emergence) of the concept has not seen any serious effort attempting to explain *why* it has occurred, especially not from where we would expect these attempts to arise, i.e. (comparative) education science. Reasons for such hesitation might be numerous.

Among others, we can state that education science has for a long time struggled to introduce globalization as a conceptual tool and remained preoccupied with national education systems' particularities and small-*N* case studies turning a blind eye to more general patterns of diffusion and change (Hornstein 2001; Scheunpflug 2003; Dale 2005; Schriewer 2009).

Another reason can be found in education's reluctance to consider social theory approaches that situate education systems in their wider political, economic and social contexts (Seitz 2004).

Thirdly, Jakobi (2006) adds that education science too readily often embraces the functional role of education for societies. A judgment this work substantially shares.

If, however, we want to explain the rise of LLL,[19] we have to turn to these wider contexts and seriously question some dominant arguments. In explaining why LLL has returned so

[19] And if we take this rise seriously and do not see it as a phantom in the publication industry.

forcefully, and why it has been given so much legitimacy in the last two decades, we might consider two prevailing arguments that have emerged in the debate on the origins of mass education. I will show that they can be again found, with slight modification, in arguments on lifelong learning.

2.1.1 The functionalist argument

Historically, the rise of mass education has been first and foremost explained using functionalistic assumptions. Facing modernization phenomena such as urbanization and lateral differentiation (i.e. division of labor), Durkheim (2000[1893]) saw education as making society work better for the general good. A common cultural base in the guise of moral and cognitive abilities (i.e., adherence to norms and knowledge) would be required to adjust individuals to the new complexity in modern societies, especially with regard to industrialized economies.[20] An influential economic and microsociological version of this argument chas been an be found since the 1960s under the label of human capital theory (Schultz 1963; 1971).

In the same vein, functionalist explanations of LLL – certainly the dominant line of explanation that can be found in the literature – hold that it is a necessary adaptation to changed needs in society and economy. An increasingly complex and competitive world economy needs more educated and adaptable workers, an aging society needs to learn for a longer period than ever before, social cohesion needs educational equality and employability, democracy needs a committed and critical constituency, early retirees need late personal fulfillment, multicultural societies need tolerant citizenries and a vulnerable planet needs caring consumers. For all these challenges, education seems to provide promising answers (Hasan 1996; Gerlach 2000; Schemmann 2001; Papadopoulus 2002; Singh 2002).

Functionalist arguments of this kind are also advanced when explaining why LLL did not see the same success in the 1960s and 1970s that it sees now. Among the reasons given, by Tuijnman (1996) for example, we find national diversity, lack of funding, the long-term horizon of LLL policies and especially high youth unemployment.

[20] See Zöllner (1963), Shonfield (1965) and Wilensky (1975) for classical accounts on the problem and Zapp (2010) for a review of their relevance in light of globalization.

Another – equally functionalist[21] – approach is more critical and is often advanced from the Left. It points to the maintenance and legitimation of the vertical differentiation of societal structures, i.e., class or elite interests (Bourdieu & Passeron 1970; Bernstein 1977; Bourdieu 1984). In these critical contributions, education serves to sustain the position of dominant groups by allocating formal equality while perpetuating actual inequality, often along ethnic differences (Wenning 1996; 1999).

Translated into the global system, we find corresponding macro-sociological offers from Wallerstein (1987), who sketches a world system made of power and interest, inequality and dominance. Similarly, Sklair (1991) paints a global system with a transnational capitalist class at its top including the corporate sector of corporate executives and their local affiliates, the state sector of globalizing bureaucrats and politicians, the technical sector of globalizing professionals and the technical fraction of merchants and media.[22]

Works that apply such perspectives on the diffusion of education come from Carnoy (1974), Adick (1992) and Dale (2000).

In the context of LLL a considerable number of scholars have pointed to how LLL is used by dominant actors for their own purposes.

In the context of LLL as higher education, Jarvis (2000:43) notes:

> "The dominant institutions in society have always generated and controlled knowledge […]. We only have to look back to the formation of universities to see the validity of this statement; before the Enlightenment their founders were the churches and after it, the State. But now the newest universities are being established by the large transnational corporations, reflecting another major shift in social and political power."

Similarly, for neo-Foucaultian authors like Edwards (2004) or Olssen (2006), LLL is a neoliberal variant of state reason and control in knowledge capitalism.

Occasionally, LLL is also thought to serve international organizations themselves. The EU – Nóvoa and Dejong-Lambert (2003) argue – uses LLL as a "unionizer" and a vehicle to advance supranational European interests through discursive strategies. Similar purposive instrumentality of education is implicit in Martens' (2007) portrait of the OECD.

It has further been noted that nation states use LLL *through* international organizations to push forward their own agenda. In discussing *International Concepts and Agendas of Lifelong*

[21] Sometimes this approach is subsumed under conflict theory. I follow Boli, Ramirez and Meyer (1985) here.
[22] More from this perspective in Van der Pijl (1998) and Robinson (2004).

Learning, Schuetze (2006:300) remarked that “not only do countries implement international concepts at their own […], they are also actively involved in shaping the international discussion and the work of the international organisations.” He leaves unspecified which countries influence which organizations. Nor does he explain why and how and with what expected outcome. In a similar vein, Dale (2005:131) believes that “nation-states themselves are by some distance the most active agents […] in collectively (though with clearly unequal power) setting the rules of the game and the transnational agendas to which all nation-states will respond.”

2.1.2 The conflict theory argument

A second explanation makes no use of problem-solving arguments and instead proposes conflict and competition among status groups taking place in the arena of education. Conflicts ignite either because groups believe that social success can only be achieved through educational success or because groups want to dominate educational management and planning in order to control the content and organization of education for their own purposes (Collins 1979).[23] Archer's (1979) seminal *Social Origins of Educational Systems* holds that power groups situated within states struggle for the implementation of their vision on education leading to individual (national) path dependencies. In its leftist version (Bourdieu 1984), positions sometimes move close to the critical functionalist argument.

Rarely noted in educational theory, the theory of conflict between actors within society is repeated in the global “arena” as alleged conflicts between (a) the state and the market, (b) the state and international organizations, and (c) between different international organizations proposing different social arrangements (including educational arrangements). I will elaborate more on the last two ideas since they are more relevant for this work.[24]

It is a recurrent theme in international relations (IR) scholarship to focus on the allegedly strenuous relation between national states and international organizations. More realist approaches stress the instrumentality of IOs, while more institutionalist[25] accounts concede some autonomy (see below).

[23] See Korpi (1983) and Olson (1985) for classical contribution in the context of national social policy in general.
[24] See Whitty and Power (2000), Robertson, Bonal and Dale (2002), Lohmann (2002) and Scherrer (2007) for the state-market-nexus in education.
[25] The term *institutionalism* in IR should not be mistaken for the same in sociology (see below).

More recently, political scientists have discovered “new arenas of education governance […] where different political actors are striving to realize their goals and interests” (Leuze, Martens & Rusconi 2007:8). They find that “[…] the state is no longer the only player which designs and shapes education policy, rather international and market actors are increasingly infiltrating its domain of education policy making” (ibid.:4).

This observation is part of a much wider (perhaps more European) debate on a “post-national constellation” (Habermas 1998:96) or “reconfigured national constellation” (Zürn & Leibfried 2005:25) in which nation states' fabric is gradually unraveling and in which nation-states “cooperate as *primus inter pares* with non-state actors” (ibid.:13).

Such analyses are often accompanied by a certain degree of fear that states would lose sovereignty in policy-making, and sometimes even a good deal of sorrow about the disappearance of the “national constellation” that had its “'golden age'” in the OECD world of the early 1970s (ibid.).

What dominates and unifies these contributions is not only the fear (or discomfort?) that states would lose the sovereignty in policy-making they once possessed, but also the assumption that processes of globalization are taking place in a situation of conflict and with dire consequences for education:

> “What we are witnessing is not just changes, albeit important ones, in the contexts of education, that have to be adequately taken into account and reflected in our accounts of the relationship between globalisation and education, but conscious efforts to develop new supranational forms of ‘education’ that consciously seek to undermine and reconfigure existing national forms of education, even as they run alongside them, and even in their shadow.” (Dale 2005:123)

International organizations are conceived of as challenging national sovereignty, manipulating policy-making and re-shaping national educational arrangements. This argument gains more strength from its proponents when discussing the “bad organizations” (usually the WB, IMF, WTO, business associations, etc.) or those considered “borderline” (at times the EU, at times the OECD). Organizations' intrusion into the intimacy of national policy-making is, however, not seen as problematic when the “good” organizations promote good things (see below).

Before such conflicts between nation states and IOs became of interest to researchers in the OECD context, they were already widely discussed in the literature on development cooperation. Here, two major lines of contributions need to be considered. One, which had its most fervent discussions in the 1970s, centered on issues of neo-colonialism, cultural imperialism, dependency and so on. The debates reflected broader concerns about development as forced modernization, domination and political abuse of aid in times of cold war and post-independence (Carnoy 1974; Galeano 1999).

Another line of criticism had its strongest momentum in the 1980s and early 1990s amidst the widely-prescribed Structural Adjustment Programs (SAPs). SAPs launched by IMF and WB usually entailed a large catalog of social policy-relevant measures. During the 1980s and 1990s, almost the entire developing world was, at some point, covered by SAPs, prompting many authors to call them the development paradigm of the time (Siebold 1995; Todaro 2000; Deacon 1994 for post-communist Europe) and part of a “Washington Consensus” (Held 2005).[26]

If we leave the state-IO-nexus, an (2) argument can be found in which international organizations compete against each other for dominance in defining the agenda. This approach has been most clearly elaborated in the analysis of social policy formation, less so with an explicit focus on education. Most prominently, Deacon (2007) lays bare patterns of class cleavages in the programmatic orientation of IGOs. It is worth taking a closer look at his work since his credit is in having directed attention to this emerging social policy field at an international level in the first place.

Transposing interest cleavages to the inter-organizational global social governance sector, Deacon (2007:21) speaks of a “global class struggle” in the guise of a “war of positions” (ibid.:33) that is fought between and within international institutions through their formulation of social policy. He embeds the programmatic positions of such organizations as IMF, WB, OECD and WTO into Esping-Andersens (1990) typology of welfare state regimes outlined in Section 1.1.2 above. The approaches to social policy of these mostly economic organizations and, in part, of the OECD correspond, then, with the liberal welfare arrangements to be found in Anglo-Saxon countries.[27]

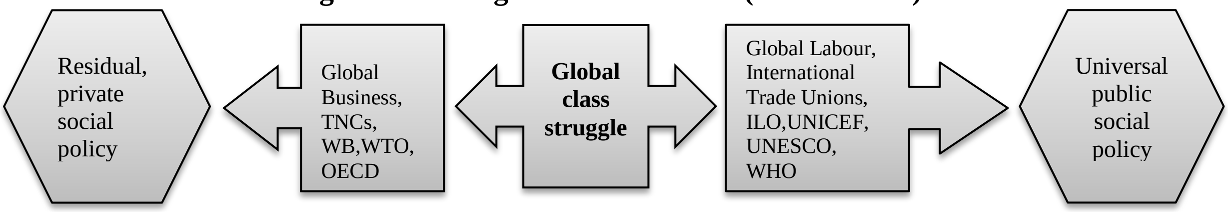
[26] Robust evidence on the effects of SAPs on education is scant and mixed. For Latin America and Sub-Sahara Africa, for instance, Reimers (1994) documents negative effects on net enrolment in primary education, and little impact on other sectors, but with clear increases in educational inequality.

[27] Deacon (2007) further differentiates his approach by focusing on the affiliated agencies within the bodies of the WB and OECD. For him, the International Bank of Reconstruction and Development (IBRD) and the International Development Association (IDA) tend to become more universal, while the International Finance Corporation (IFC) – another arm of the WB – favors market-based provision of health and education. The Directorate for Employment, Labour, and Social Affairs (DELSA), an OECD department, is more in favor of public provision of social services than the overall OECD orientation.

In opposition to market-based social policy are the approaches taken by the ILO and several other UN agencies. The ILO positions reflect the Bismarckian or conservative model found in countries like Germany, France or Belgium where social partners engage in a corporatist dialogue to maintain social peace. In other UN agencies (UNICEF, UNESCO, WHO and UNDESA), Deacon (2007) identifies a universal approach as established in the Scandinavian welfare type, with a strong approval of public services, accessibility and a comprehensive security net.

The classification of programmatic orientations (Figure 2.1) detectable in IGOs, as proposed by Deacon (2007), enlarges the agency-spectrum in conflict theory by pointing to ideological cleavages that, henceforth, run across internationally-operating organizations.

Figure 2.1: The global class conflict (Deacon 2007)



Similar comparative works on education are rare. As we saw in Section 1.3.2 theoretical approaches suggest speaking of different and conflicting models of LLL. However, when organizations' LLL positions were compared in analyses, most authors noted converging agendas (Schemmann 2007). In turn, case studies on single organizations, if taken together, might suggest some noteworthy cleavages between organizations (on UNESCO Rutkowski 2007 vs. Ouane 2009, for instance). Such disagreements or contradictions might be explained through analytical and methodological problems (small *N*, different analytical strategies and criteria in assessment of LLL) or normative stances. It is, therefore, worthwhile to look out for possible divides in particular aspects of organizations' LLL conceptualizations.

In sum, both functionalistic and conflict models might have much to contribute to the understanding of the emergence of new policy-making structures, but they face the same serious theoretical and empirical problems when confronted with the universalistic diffusion of LLL as they did with the diffusion of mass education. Empirical findings, both for mass education and the few we have so far for LLL, largely challenge these theories.

For mass education, ‘Why is it that it emerged first where modernization in general and economic modernization in particular were less significant (Prussia, Austria, Denmark, Sweden and Italy)?'. If education is to reflect functional requirements of societies, 'Why is it so homogenous with regard to purpose, organization and content across the globe?'

The origin and diffusion of LLL beg the same questions. If LLL is to meet requirements of the knowledge economy, 'Why did it emerge at a time long before such terms as *employability* or *knowledge economy* even existed (1960s) and in a purely non-economic context (Council of Europe and UNESCO)?' Similarly, the re-emergence in the 1990s was firstly in an UNESCO-context, only later did OECD, EU and WB join the debate with more economic arguments.

Moreover, LLL, which is, in its current form, considered a radically new approach to planning educational organization, has, in less than 15 years, seen diffusion in countries worldwide with highly diverse cultural, social and economic backgrounds. They have begun to embrace the idea and to initiate reforms in the name of this idea, as shown above with reference to Jakobi's (2006) work. Which poses the question, 'Is LLL an equally appropriate response to the functional needs in all those countries?' More generally, 'Why is it so taken for granted that education and LLL actually *can* achieve what they are supposed to achieve (employment, development, more equality)?'

In reaction to critical functionalist approaches, one might ask, 'Why is it that elites (global capital?) need LLL to maintain their dominance?' 'Why do they, presumably, seek to improve the lives of the dispossessed through such mass-scale obfuscation by telling them to learn more and longer in order to gain in status and importance and quality of life?' And, if 'Education for All' became the dominant paradigm in development discourse in the 1990s, 'Why should lifelong learning be more selective in scope?' If it is assumed that an "Educational Washington Consensus" exists, that is to say that certain national states and organizations are suspected of imposing their vision of education on other states using international organizations, 'Why is it that so many allegedly opposed – and, as we will see, much more than assumed – organizations use the notion in similar terms?' These include organizations that are completely independent from state influences and in opposition to global capital. Further, if these powers (rich countries? global business?) exert influence, 'Why in the realm of education and why through international actors in the first place?'

The latter question brings us to the discussion of conflict theory. If actors struggle to dominate social discourse and social organization, 'Why have they made education their arena in the first place (i.e., why has education become so important)?' If a conflict between national states (including powerful ones) and international organizations is assumed, 'Why do states not limit their support for these organizations?'

Apart from an analytical double standard (welcoming the "good" organizations, shunning the "bad" ones), we have to theoretically cope with some empirical facts. International actors are created by nation states and new ones continue to emerge. Many of them are universal, all of them voluntary in membership. They are funded by nation states and are listened to. Assuming permanent conflict between states and international organizations raises difficulties in explaining all these realities, especially when confronted with highly integrated regional formations like the EU.

Moreover, mass scale introduction of compulsory education and curricular standardization took place worldwide before the social sciences talked about globalization, marketization and international education governance. Thus, it seems plausible that today's international actors do not demand something from states which is not already part of their horizon (which does not mean it is within reach).

Interestingly, commitment to education, as bundled in the Education for All initiative, brings together seemingly antagonistic organizations with fairly common assumptions about free public primary, and even secondary, education. Conflict theory, when confronted with notions of universalism and equality (on the substantive side) and convergence or isomorphism (on a more analytical side) soon runs out of explanatory power.

Without denying the value of these approaches for the analysis of other aspects of social life, it seems that they come up against theoretical and analytical borders when facing some empirical facts in education. Partly in reaction to these approaches, a quite different answer has emerged and established itself under the label of sociological neoinstitutionalism,[28] which will be the subject of Chapter 3.

2.2 International organizations and the diffusion of lifelong learning

International organizations have been given growing attention in policy field analyses in recent years. However, the study of IOs in the context of education and LLL (though not only in this context) has so far been marked by certain biases. There is an analytical bias towards

[28] For reasons of simplicity, I will refer to sociological neoinstitutionalism (especially in its world polity extension) simply as *neoinstitutionalism* or *world polity*/ *culture* in this work. International relations scholarship has come to call *constructionist* many positions that resemble the theoretical positions found in sociological neoinstitutionalism.

the big organizations to start with. Among these we can identify strong normative biases in favor of some and against other organizations as a second problem.

Furthermore, IOs are often seen as the handmaiden of powerful states (often the "bad" organizations) and when they act, they act on behalf of these states. Their action is further mostly analyzed as an *inter*action, usually with states (rarely among themselves). Here, multiple interaction mechanisms and outcomes have been proposed under the label of *governance*. Much less attention has been given to what happens within them and how they arrive at the (often very similar) recommendations that are under scrutiny in the literature on the IO-nation state relationship. This section intends to point to the problems that become particularly visible in the analysis on educational governance.

2.2.1 Beyond the "big four" and the "good and the bad organization"

The consensus in the literature on the finding that international organizations have a part in the LLL success story distracts from the fact that we do not even know what actors we have to consider. As should have become clear in Chapter 1, research on IOs has abundantly concentrated on the "big four", WB, UNESCO, OECD and the EU (see Section 1.3.3). This is not without reason, since these organizations presumably raise most of the funds, possess most of the expertise, pursue the most thorough strategies and might, consequentially, exert most of the influence in the field. However, talking about *international* educational regimes or *global* education governance, it appears that this narrow focus is theoretically inconsistent and has consequences for our understanding on the diffusion of LLL, as it obscures significant generic qualities and the effects of international organizations in general. Despite the global range of two of the big four organizations (UNESCO, WB), which are universal with regard to membership, if we want to analyze a global discourse, we have to look at those organizations that have explicitly been created as a voice for areas other than those in the Northern hemisphere, both in terms of their headquarter location and their member countries. When Jakobi (2006:112) detects LLL diffusion in national statements worldwide while attributing much credit to the "emerging phenomenon of global governance" in the guise of "international levels of education policy making", it is analytically short-sighted to look only at the OECD and the EU as the main propellers of diffusion.[29]

[29] It has occasionally been noted that OECD activities involve more than OECD member countries and through the OECD Development Assistance Committee (DAC) the organization might even have a clear operational

Such limitation appears even less tenable if it is considered that scholarship on social policy in general has already come up with a far more nuanced picture of the potential actors involved. In extending the national welfare mix concept into the global policy space, social policy scholarship has tools at hand allowing it to detect policy actors at different levels, of different types and in different sectors (Yeates 2008). More importantly, it overcomes the OECD bias by paying attention to the social policy arrangements that are markedly different in less industrialized countries. Particularly enriching here are references to international non-governmental actors at the intermediate and market level, as well as philanthropic organizations.

In addition, research on global social policy has highlighted the burgeoning of regional bodies that incrementally weave social issues into their regulative fabric (Deacon & Yeates 2006; Van Langenhove et al. 2006).

Table 2.2 shows how weighty the social dimensions of the respective bodies are and where blind spots persist. We can see that virtually all areas have seen the formation of several regional representations that address social issues. Latin America might, perhaps, be the densest region in terms of including supranational social policy networking, particularly with regard to transnational labor and education policies (Zapp 2013a).

Research from this perspective has been less interested in education than in the more conventional social policy areas (social security, pensions, health, etc.), but the analytical implications are highly relevant for a work that looks at the global diffusion of LLL among IOs. I will show in my own analysis that the oversensitivity to a few (albeit important) actors heavily obscures the dynamics in the wider organizational field, which has evolved substantially in the last decades and now includes actors in multiple sites on multiple scales and of multiple types very similar to the global welfare mix found in social policy studies.

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mandate for cooperation and assistance beyond its members (Jakobi 2006; Rutkowski 2007). This does not, however, change the relevance of the argument in principle.

Table 2.1: Track record of regional social policy (Deacon & Ortiz & Zelenev 2007)

Regional institution and actors	Social ideas and objectives expressed in statutes	Policies and instruments		
		Regulation	*Redistribution*	*Provision*
ALBA	+		+	All bodies provide technical support and promote capacity building but do not provide direct social services in member states
APEC				
ASEAN	+			
AU				
CAFIO		+		
CAN			+	
CARICOM		+		
EU	+	+	+	
LAS	+		+	
MERCOSUR	+	+	+	
SAARC		+	+	
SADC	+	+		

A second line of criticism follows Barnett's and Finnemore's (2004) impression that most research on international governance from classical IR scholarship (especially in its neoliberal variant) is marked by a *normative* bias. For most IR scholars anchored in liberal thinking, IOs are a good invention (see Keohane & Nye 2000, for example). They help to solve problems of coordination between states and within them, amid increasing global interdependence. Human rights, democracy, the rule of law, free markets and other modern institutions are all at the heart of IOs' missions, turning them into the spearhead of desirable progress.

Conversely, social policy and education researchers sometimes tend to lean so excessively to one of the poles of an alleged ideological policy paradigm continuum (i.e. the universalist vs. residual social policy continuum), that one might ask if IOs' recommendations are really so coherent in the whole array of policy fields as to allow for such sweeping advocacy or devastating critique. In the same vein, scholarship on LLL addresses the issue with the aim to unpack the neoliberalism reigning in WB, IMF and WTO (DoNóvoa & Dejong-Lambert 2003; Dale 2005; Rutkowski 2007; Centano 2011). Unsurprisingly, these authors usually find what they look for. This is not to fundamentally criticize normative approaches in social sciences, but, analytically, it seems hard to hold that IOs are as monolithic and static in their “thinking” as assumed in these contributions.

Moreover, normative approaches take it for granted that IOs actually *can* solve the problems, for which they have presumably been created (or for which they now recreate themselves). As Abbot and Snidal (1998:5) put it:

> "[International organizations; M.Z.] allow for the centralization of collective activities through a concrete and stable organizational structure and a supportive administrative apparatus. These increase the efficiency of collective activities and enhance the organization's ability to affect the understandings, environment, and interests of states."

This is, for example, the implicit theoretical core in Parreira do Amaral's (2011) regime approach and it is explained through the dominant line of thinking on the relationship between IOs and states. For the most part, accounts from IR, as well as numerous contributions from comparative science, are still heavily anchored in a *statist* framework, within which international actors are only instruments that act on behalf and at the behest of nation states. Here, powerful states generously equip specific IOs in order to fulfill an extended national mandate.

Such assumptions are clearest in the neorealist and liberal IR scholarship that starts from a Hobbesian world where security is the overriding priority of foreign policy and cooperation only a means to the "egoistic" ends of powerful states. In such a world, there is no place for collective goods as motives of state behavior and identity, nor does this theoretical approach provide for the consideration of non-state actors (IOs, NGOs, civil society and so on) as more than just instruments of powerful nation-states to further their interests (classical Waltz 1979; more recently Ikenberry 2001).

Such instrumentalist arguments have continued to be the main tenet in neoliberal IR scholarship, although with a softened view on state actors (Keohane & Nye 2000). If IOs are conceded any meaningful "behavior", it is theorized in terms of transaction costs or principal agent approaches where states still define the rules in case their agents (IOs) have deviated too far from their conceded mandates (Thatcher & Stone Sweet 2002). Even in recognizing the role of knowledge and expertise of IOs and the social processes of international politics (instead of the structure), as in works by Krasner (1983) and Haas (1992), such works still "look for correlation between what states want and what IOs do" (Barnett & Finnemore 2004:29).

In so heavily emphasizing their functionality, these analyses often miss the "pathologies" inherent in the international sector (Barnett & Finnemore 2004). Understanding failures and inconsistencies, or at least dysfunctional phenomena, in the IO context requires a theoretical apparatus that does not contain any *a priori* assumption about what they ought to promote and do (and what they are actually capable of doing).

Furthermore, IOs, especially INGOs, work on issues that are often beyond state interests or the functional requirements emanating from the complex interdependence or multi-level coordination problems so prominently discussed in Krasner (1983), Keohane & Nye (2000) and Hooghe & Marks (2001). The fact that they stand for such thorny issues as human rights, health and education often implies conflict and opposition and, given the high costs for all involved, makes it less plausible to see them as only serving as “boards of directors for ruling states” (Boswell & Chase-Dunn 2000:238).

Normative and functionalist approaches are perhaps useful in explaining why IOs have been created, but they fail to explain how these actors – once created – evolve (often unpredictably) and behave (often in opposition to states). As they do not ascribe much autonomy and authority to IOs, they vastly understate what happens within them. Treated as black boxes, IOs are analyzed in terms of the value they have to nation states, particularly powerful ones. These accounts might, perhaps, be good at explaining why the OECD was created after WWII, but they have difficulties in addressing the fact that the OECD has increasingly incorporated tasks and mandates which were not mentioned in their original mission statements, most prominently the significant work it now does on education. They might be able to explain why the WB was created (as a bank for the reconstruction of Europe), but they cannot account for the fact that it is now the biggest financier, data gatherer and research publisher in education worldwide. Similar evolutions can be found for almost every organization in my sample: once born, international actors seem to grow considerably – not only in budget and staff, but also in their missions and aims and their operational portfolio. IOs' behavior is often challenging for their members. If IOs are treated as mere tools deployed by nation states to solve international coordination problems, this is a fact hard to explain.

Partly as a reaction to the failure of these normative and functionalist state-centric arguments, IR has seen the emergence of a constructivist perspective (Wendt 1999). While Wendt and other pioneers in the field have mostly paid attention to states as the primary actors in the international system, Barnett and Finnemore (2004), for instance, focus on the authority of IOs. They view IOs as bureaucracies displaying the generic traits recurrently highlighted since Max Weber (2005 [1922]). IOs as bureaucracies are apt to efficiently administer and organize modern societies through hierarchy, continuity, impersonality and expertise. The latter is, at the same time, one source of the IOs' authority. Inasmuch as we want physicists to deal with nuclear issues, doctors to handle pandemic diseases and food experts famines, we trust bureaucrats' specialized, professionalized and technical knowledge in dealing with social coordination and entrust authority to the institutions those experts populate.

Two more sources for authority are the rational-legal jurisdiction IOs exert in their domain of action and the delegation of national authority to the international system. States confer authority “upwards” on a regular basis in a myriad of social, political, economic, technological and cultural aspects, giving away some of their authority to inter- or supranational bodies. All this taken together (legal domination, delegation of power and expertise), already accounts for explaining the autonomy IOs dispose of globally. Yet, Barnett and Finnemore (2004:23) add a fourth factor, following their observation that “IOs are often created to embody, serve, or protect some widely shared set of principles and often use this status as a basis of authoritative action.”

This moral authority is derived from the IOs' self-presentation of being impartial and independent from nation-states' interests. The role as the consciousness of the international community or its objective representation is one of the chief objectives of any IO, as it can be seen as a strong ground to legitimize their autonomy *vis-à-vis* nation-states (an assertion almost unimaginable in realist thinking).

At the same time, in stressing the internal bureaucratic culture so strongly, IR constructivists remain mute on the substance of this “widely shared set of principles” (ibid.). As it is the main tenet of this work to shed light on IOs' behavior as autonomous and internally complex organizations, we not only have to turn to approaches that take into account the authority and legitimacy IOs possess in the global system, it is also imperative to ask where this legitimacy comes from and how it is maintained, even under conditions of constant “failure” in the world (e.g. ongoing military conflict, poverty, climate change, human rights violations, recurrent failure to meet EFA and MDG goals). We will see in the Theoretical Framework that world polity theory has more to say on this than the IR strands presented above.

2.2.2 International organizations and educational governance

Research on educational governance has become ample in the last twenty years.[30] Just as for other policy areas, international organizations have come to be seen as crucial actors in these new policy-making networks (see above). Their specific role is usually described in the, by

[30] It is beyond the purpose of this section to provide a detailed account of educational governance contributions. See Parreira do Amaral (2011) for such a review.

now, classic distinction between *coercive* and *normative* (or persuasive) influence mechanisms (Nye 1990; Jacoby 2004). Both mechanisms have also been discussed for education and (although less) for LLL. It is worth clarifying the main arguments here.

For a long time, both IR and research on global social and education policy mainly focused on "hard power" or coercive and regulative instruments. With international organizations often conceptualized as a transmission belt, powerful states are seen as imposing their ideas on IOs, which then impose these ideas on weaker states. In a rational and hard-boiled world, where powerful states compete among each other for dominance, regulative institutions diffused through coercion are the main focus of interest. In the social world of international politics, rules, laws and sanctions are complemented by military, financial, economic and diplomatic factors. With regard to IOs, we already understand WB and IMF conditionalities in their SAPs or in lending in general. Here, financial and technical leverage might prompt states to act as expected. WTO/ GATS might be another example of (controversial) regulation in education (Scherrer 2007). Financial means for shaping LLL implementation have been highlighted by Jakobi (2006) for the EU and the WB.

Sometimes there is disagreement about what "hard" and "soft" apply to. For Dale (2005) the EU's open method of coordination (OMC) is coercive:

> "What we are witnessing, it may be suggested, is the development of forms of learning that might fall under the broad heading of coercion. The best example of this is again the Open Method of Coordination (OMC), often referred to as a form of 'soft governance' that contributes to the 'subtle transformation of states' (Jacobsson, 2002). This involves mechanisms such as benchmarking, peer review and the development of best practice, where in each case a European rather than one or more national definition is used, constructing an alternative and distinct model to be followed that is common to all MS [member states; M.Z.] and at least sits alongside all national models […]." (Dale 2005:145)

Martens (2007) and Jakobi (2006a) refer to the OMC as a soft mechanism. "Soft" in this sense refers to normative mechanisms. In these softer versions, IOs become "knowledge brokers" (Jakobi 2006) or "teachers of norms" (Finnemore 1993) or "norm entrepreneurs" (Barnett & Finnemore 2004). Normative mechanisms have received notable attention in recent years, probably due to a stronger constructionist voice in IR. Barnett and Finnemore (2004), for instance, make out three specific soft mechanisms, which they denote as (1) the *classification* of the world; (2) the *fixing of meanings* and (3) the *diffusion of norms*.

By *classification*, they refer to the taxonomization of economies according to their GNP (UN, IMF, WB), a person's life quality by the Human Development Index (UN), absolute poverty thresholds (UN), famines (FAO), pandemic and diseases in general (WHO), migration and asylum-seeking (UNHCR) and illiteracy (UNESCO and OECD).

IOs further instill these categories with *meanings* (definitions, roles and actions). Development, poverty, security, health, climate, education are all bromides unless they become girded with precise meaning in precise contexts. IOs deploy meaning by framing (metaphors, symbols, suggestive phrasing and so on) to

> "[...] situate events and to interpret problems, to fashion a shared understanding of the world to galvanize sentiments as a way to mobilize and guide social action, and to suggest possible resolutions to current plights." (Barnett & Finnemore 2004:33)

The third mechanism is norm diffusion. In an earlier article Finnemore and Sikkink (1998) shed light on the "life cycle" of norms. In a three-stage diffusion model they depicted how norms emerge, spread and are internalized by relevant actors (Table 2.3).

In answering how norms emerge or where they come from in the first place, Finnemore and Sikkink (1998) focus on the role of *norm entrepreneurs* as "agents having strong notions about appropriate or desirable behavior in their community" (ibid.:896). These norm entrepreneurs can, in principle, be any kind of actor, that is, individuals (e.g. Henri Dunant), organizations (Médecins Sans Frontières) or nation-states (e.g. the Allies after WWII).

Most of the motives behind such behavior can be roughly subsumed under idealism. Even though a change in norms may not affect their situation directly (let alone their material well-being), they engage in struggles that are time-consuming and costly and, sometimes, even little promising. It is also this very idealism that is the basis of diffusion, the mechanism of which the authors simply describe as "persuasion" (ibid. 898). In this sense, norm entrepreneurs appeal to the conscience of other actors trying to evoke the "good" and "noble" that is associated with their ideas.

Table 2.2: Stages of norms (Finnemore & Sikkink 1998)

	Stage 1 **Norm emergence**	**Stage 2** **Norm cascade**	**Stage 3** **Internalization**
Actors	norm entrepreneurs with organizational platforms	states international organizations, networks	law, professions, bureaucracy
Motives	altruism, empathy, ideational, commitment	legitimacy, reputation, esteem	conformity
Dominant mechanisms	persuasion	socialization, institutionalization, demonstration	habit, institutionalization

Soft instruments have received growing interest in research on education in general and lifelong learning in particular with the instrument of classification being the most frequently noted. Heyneman and Lykins (2008) counted 33 international comparative studies. Power (2004:766) felt a “metrological mood” in education and Martens (2007:42) identified the “comparative turn” transforming educational governance into “governance by comparison.” For Rivera (2006), evaluation is next to policy-making and planning the third major tool of international organizations to develop adult education, while Kallo (2006:282 ff.) analyzes OECD soft governance in terms of “strategic consulting, peer pressure, public studies and direct and indirect agenda-setting”.

Jakobi's (2006; 2009) work builds on Barnett and Finnemore (2004) in conceptualizing LLL as a norm. In her analysis of LLL activities from UNESCO, EU, OECD and WB she finds five different instruments of governance. While funding, technical assistance and coordination are more at the coercive, or at least regulative side, dissemination and standard-setting might fall into the normative category.

Table 2.3: Governance instruments of international organizations (Jakobi 2009)

Governance Instrument	Dominant Function	Example
Discursive dissemination	Establishing ideas	UN Promotion of Sustainable Development OECD Promotion of Lifelong Learning
Standard-setting	Prescribing behavior	UN Recommendations OECD Benchmarks
Financial means	Transfer payment	WB Financing EU Project Financing
Coordinative activities	Execute surveillance	EU Open Method of Coordination OECD Peer Reviewing
Technical assistance	Support structures	UNODC Model Laws IAEA Trainings in Radioactive Detection

However, as theoretically useful such distinctions may be, empirically it is often difficult to ascertain what specific mechanism is at work when the ILO impacts on welfare spending (Strang & Chang 1996) and educational leave regulation (Schuetze 1996), UNESCO spreads science bureaucracies worldwide, even where there seems to be no need (Finnemore 1993), and the OECD catapults LLL into the world (Jakobi 2006). Often these empirical ambiguities emanate from methodological problems of how to make IOs' intentions, influence mechanisms and their outcomes analytically amenable.

More importantly, influence of IOs must not be overemphasized. There is solid empirical support that large-scale (worldwide) change occurs within states only marginally affected by IOs. For example, pro-female enrollment policies for higher education, often promoted by IOs, have no direct effect at all at the country level. Worldwide female enrollment in HE has increased dramatically after WWII, but in both countries that adopted policies and those that did not (Bradley & Ramirez 1996). The same holds for the ban on child labor. Ratifying the ILO convention against child labor does not influence countries' behavior in practice (Abu Sharkh 2002). Yet, child labor nevertheless declines worldwide. Cole (2005) shows similar paradoxes for human rights.

It seems that IOs are well-placed to influence other actors by “making them do”, i.e. forcing, tricking, paying, talking, persuading, pleading and socializing. But this influence is not always exerted in a direct way and is not always successfully. It seems more is at work. While constructionists from IR admit that knowledge is socially-constructed, they miss identifying the fact that the actors deploying this knowledge are themselves constructed. Much wider cultural forces might instead prompt actors to instill their identities with new properties, and this may be even truer for IOs themselves than for any other entity (states and individuals). We will see in Chapter 3 that sociological neoinstitutionalism offers a more nuanced vocabulary to describe such phenomena.

Moreover, all governance mechanisms implicitly refer to social or cultural change. With an actor being assumed to exert influence in some way, the status quo becomes altered. This process is, both in the normative and coercive variant, a rational process (i.e. a purposive attempt to influence) and its outcome is usually measured in terms of policy adoption or refusal. The following sections intend to carve out the theoretical and methodological problems that occur if relationships between governance actors are conceived of in such a straightforward way.

2.3 Models of lifelong learning in the context of international organizations

The third puzzle in the study of LLL is both theoretical and methodological in nature and concerns the substance of lifelong learning, i.e. the substance of diffusion. First, in works where the diffusion of LLL is investigated, the concept becomes reduced to a set of variables, which are defined as policies and these, in turn, as legislation. Such treatment, I will argue, leads to a distorted picture of what diffuses or is being diffused.

Second, we will see that models of LLL, as proposed by the literature, bear some serious methodological flaws, which makes it difficult to use them unaltered for my own analytical framework.

2.3.1 What diffuses?

Approaches to policy transfer introduced in the previous sections implicitly suggest that diffusion *is* governance and IOs exert influence *by* diffusion. This is a welcome finding in a work that investigates the scope and content of worldwide diffusion.

In addition to governance mechanisms of diffusion, IR and comparative disciplines have started to track the movements of policies or ideas. Traditionally, most research done on policy transfer in general and education in particular focuses on processes taking place between nation states or nation states and IOs. Of course, there is much reason to look at inter-state processes since it is there that education policies are eventually implemented (or not). However, when Wiseman, Pilton and Lowe (2010:4) state that there is now "an environment of extensive policy borrowing and model transfer from one nation to the next", we have to add that IOs are an important part of this environment. I further agree with them (ibid.) that there is an "increasing availability of internationally comparative educational information" and "'internationalized' models of educational policy", but want to make explicit that it is often through IOs that this information is made available and these models are internationalized (and often produced in the first place).

Although state-IO-relations are of less importance in this work, the concepts to describe them usually underwrite the general importance of IOs and have much to say about specific instruments or mechanisms of diffusion and will be given attention here. The, by now, impressive body of literature on transfer and diffusion has generated a complex grammar on the movement of ideas, both as process and as reception. Jakobi (2012) has done some groundwork in clarifying the conceptual approaches (Table 2.5).

Table 2.4: Movement of education policy (based on Jakobi 2012 and sources indicated in the text; simplified)

Concepts of policy movement		Concepts of policy arrival or reception
adoption	lending	adoption
implementation	transfer	implementation
learning	diffusion	indigenization
borrowing	convergence	hybridization/ creolization

Adoption and *implementation* represent accomplished movement, i.e., arrival or reception. Here, the policy movement is methodologically treated as finished once the policy is translated into a law or a program. Jakobi (2006) herself has analyzed such processes for LLL as ECCE, HE and AE policies.

Learning, *borrowing* and *lending* and *transfer* suppose that there is a relation between actors (actor A draws on actor B's experiences with the latter representing best practice or a good example). In their EU analysis, Lee, Thayer and Madyun (2008) suggest institutional learning. Here, they point to the fact that, in the mid-1990s, the EU commission made, for the first time, a major effort to get involved in education matters. This move took place amidst a period where substantial work on LLL was being initiated by more experienced organizations, such as UNESCO and OECD. They suggest that, in entering a new policy field searching for expertise, EU officials drew on these IOs.

Diffusion refers to cross-national policy adoptions and implementations where no direct relation is necessary. Jakobi's (2006) work lends much support to the diffusion thesis, at least concerning countries. The scope, speed and loose coupling with which the concept flows largely refutes any rationalistic argument that underlies concepts of learning, lending and borrowing. In addition, the limited diversity in countries' contextualization of the LLL idea, leaves little ground for such concepts as translation or indigenization (see later).

Finally, *convergence* means increasing similarity with the focus on the reasons for such convergence. Rutkowski (2007), Schemmann (2007) and Jakobi (2007) see convergence among the "big four" when looking at the *purpose* of LLL.

As policies "morph as they move" (Cowen 2009:315), there is also growing interest in specific reception mechanisms (right column in Table 2.5). Adoption and implementation have already been described above. They refer to "successful" reception.

Maurer (2007) found *indigenization* in his analysis of secondary school curriculum reform in Sri Lanka: he found that extant local cultural and socio-economic material merges with global ideas proposed by external actors, producing a "parallelogram of different forces" (ibid.:273). He sees indigenization as a strategy pursued by local actors that avail themselves of the global menu at hand to successfully weave some new elements into something specific to the local situation. In this sense, some policies of the *New Education Reform* that were later identified as completely out of place (such as massive digitalization) were combined with more culture-sensitive ones (such as practical and technical skills) to meet the specific local demands.

Similar to indigenization are *hybridization* and *creolization*. Maroy (2012:75) identified “hybridisation of (supranational; M.Z.) models with local elements” in analyzing member states' reaction to EU initiatives to enforce evaluation practices and quasi-market principles in education systems.

There are at least four problems with most of these concepts. (1) They have been developed for interstate movement, not for inter-organizational or horizontal movement. Where they describe state-IO-interaction, they sometimes resemble the governance mechanisms from the previous section and bear their own shortcomings.

(2) most of them imply rational behavior, on both the sending and the receiving side, especially when assuming a “learning” process. They do not take into account that actors act under restrictions and might enact laws only on grounds of legitimacy, with the potential for highly detached official policy and actual practice. Further, they ignore that, in complex environments (as is usually the case in social life) with high expectations, solutions might sometimes simply be copied from allegedly successful actors. This mimetic process will receive further attention below.

A (3) problem can be found if looked at the assumed causality. Many accounts on policy diffusion implicitly or explicitly base their arguments on direct relations between sending and receiving units. Nagel (2009), for instance, investigates the Bologna process from a network analysis perspective, Jakobi (2006) treats EU and OECD membership as an independent variable and Chabbott (2003) looks at interaction frequency/density across the organizational field members in the guise of conference participation. Direct contact between actors might certainly influence diffusion, but is by no means a sufficient, or even necessary, condition. Drawing a direct line between policy implemented by actor A and policy implemented by actor B is short-sighted, since other factors might prompt, facilitate and accelerate as well as impede implementation. Among these factors, the wider cultural environment and the substance of diffusion are especially important (see the following point).

Closely related is a (4) point. Although LLL is sometimes treated as a *norm*, its diffusion or transfer is usually measured in terms of an adopted law or program. Such an approximate variable is often the closest we can get to operationalize “flows”. Where ECCE laws are enacted (Jakobi 2006), adult education programs are renamed as LLL programs (Schemmann 2007) or higher education reforms initiated (Schuetze & Slowey 2000) authors speak of successful LLL diffusion.[31] When such action is absent, countries are called “laggards” (Jakobi 2009:145).

Such approaches are all the more problematic when considering that Jakobi (2006) finds low correlation between countries' nominal reference to LLL as an idea and the implementation of policies in ECCE, HE or AE. LLL might well, therefore, be an example of *decoupling* in two ways. First, the nominal reference or commitment to LLL might not imply any actual changes. In the case of IOs, these changes might imply initiating LLL programs and projects, funding of LLL measures, establishing a committee entrusted to elaborate on LLL practices, etc.

Another important implication of decoupling is that the process of diffusion is one of mimesis and the content of such mimesis is not a specific policy bundle, but more abstract models, menus, narratives and scripts, which are institutionalized at and legitimated by powerful cultural accounts that trigger implementation worldwide. Here, we touch on a methodological problem that cannot be solved with quantitative designs.[32] The final section attempts to explore this aspect in more detail.

2.3.2 What is a lifelong learning *model*?

We saw that qualitative studies exploring the meanings inherent in IOs' accounts on LLL are scarce, even more so in a comparative design (Section 1.3.3). What we get here is an idiosyncratic picture of the “big four”. Not only are other actors missing, but even the few studies available are barely comparable, since they are based on different heuristics. Extending the above criticism, if we want to understand a globalizing educational sector, we have to look out for more actors than the big four and we have to look at what those other actors mean by lifelong learning. This problem becomes even graver when taking into account that although some case studies look at global organizations (WB, UNESCO), only the implications for industrialized countries are usually considered. Most of the publications from such organizations are, however, targeted towards a genuinely global public.

[31] The question of what diffuses is only a mirror image of the related question of what is to be compared, which applies, of course, to comparative science in general (see Dale 2005 and Schriewer 2009).
[32] And neoinstitutionalists (Strang & Meyer 1993; Meyer 1996:250), therefore, call not only for more elaborate arguments about the reception of ideas, but, above all, “about the contents of ideas that travel and don't travel.”

A critical note on the *models* of LLL is also necessary. Careful reading of Schuetze and Casey's (2006) *International models of lifelong learning* raises some important questions. ‘What do these models apply to, countries or IOs or both?’, ‘What countries or IOs?’, ‘Where do the conceptual terms (categories) within these models come from, empirical investigation, educational theory or social theory?’ More epistemologically, ‘Are these models ideal types or prototypes (empirically grounded), mere concepts or do they describe the authors’ personal utopia or dystopia?’ Terminology already points to these inconsistencies: *concepts* sit alongside *models* and *types* are often sandwiched between *strategies* and *programs*. Moreover, normative and descriptive, deductive and inductive contributions are often difficult to discern from each other. The same problems can be found in Wiesner and Wolter's (2005) models of the LLL society, although here, at least, the range is specified (OECD countries). Green's (2006) models are confirmatory in that he tests what theory suggests, but analysis is confined to Europe and some other OECD countries and his indicators only consist of participation in adult education courses, which is not very useful in a more qualitative design.

As stated before, these models might serve to sensitize for qualitative analysis, but should also be treated with great caution, inasmuch as they set down a continuum of meanings that still has to be put through a more thorough test.

Another problem is closely related. There might be many (methodological, normative, personal, theoretical) reasons why empirical research on LLL is based on pre-defined notions (often amounting to stylization), but the consequences are often counterproductive. One variant of this stylization is conceptual reduction. Most work on LLL in the context of IOs departs from the assumption that it is adult education that will become changed in a new LLL “system” (Section 1.1.1). Marked by their personal research domain, researchers only look for the implications of LLL models and reforms in the context of specific sector perspectives. Such an approach not only anticipates in which sector LLL might be found, it also unduly anticipates and establishes a specific meaning of LLL (e.g. LLL as adult education). This is all the more difficult to justify when – like most works – they do not even take into consideration the possibility of alternative meanings, consciously ignoring IOs' reference to LLL in different contexts. As seen in Jakobi's (2006) analysis of national education reports, even a broad heuristic focus on three sectors (ECCE, HE, AE) did not prove to be highly correlated with the reforms eventually initiated by countries. Therefore, at least from the nation state perspective, there is no clear sector that could possibly reflect LLL as a whole. This is an important finding and we will explore some explanations for this further below in this section and in the Theoretical Framework.

In any of these cases, such Procrustean handling of the concept in the literature provides an inaccurate picture. A minor consequence of this situation is disagreement and misunderstanding between and within disciplines, as the example of periodization shows. Some start their analysis in the 1990s (Jakobi 2006), others in the 1960s (Dewe & Weber 2007) and a third group points to even earlier roots (Centano 2011). Some see the 1980s as a “valley of decreasing interest” (Dehmel 2006:51), others as a phase of softening up (Jakobi 2006). Again, others stress the importance of this very decade in preparing a “neoliberalized” variant of LLL (Lee, Thayer & Madyun 2008).

A graver consequence follows from this definitional blur considering that some actors are suddenly discovered as new agents of LLL even though they had been involved in educational sectors that some associate with LLL (and others not) for a long time before the mid-1990s. The strong role suddenly attributed to the WB and the OECD exemplifies such cases.

Another form of stylization occurs when researchers attempt to conceptualize global policy-making in notions directly borrowed from national processes. This is true for both conflict theory and functionalist accounts and for the extension of welfare regime theory into the realm of IOs, as in global social policy research, which, all taken together, makes for the largest part of LLL analyses.

The problems with functionalist ideas about LLL are exacerbated for several reasons when looking at less industrialized areas. If LLL has been made imperative since knowledge has become the primary engine for economic development, ‘How can the same concept be as helpful in countries where even universal primary education has not been achieved?’ Two answers are interesting: either the concept becomes adjusted to different contexts and we have to investigate whether there are different models or meanings in different areas in order to understand the global LLL diffusion. Or, the LLL models remain unchanged, which brings us back to the initial question.

The functionality of LLL is taken for granted, both in analyzing countries' and IOs' positions. We will see that functionalist explanations in IOs' works equally dominate the train of reasoning. Thus, epistemologically, scholarly analyses and IOs' descriptions highly match. They only differ in the questions of how to implement it correctly.

These quarrels, in turn, are visible in conflict theory accounts where (often stylized) cleavages between strong public funding for LLL and individualized market models and more emancipatory (and sometimes humanistic) notions of LLL are thought to compete with neoliberal vocational LLL versions. Here, the normative bias, as found in the study of IOs, is repeated, as some authors prefer one LLL model over another. I would hold that such *a priori* assumptions of ideological cleavages might obscure much of the complexity within IOs and, more importantly, the emergence of new ideologies or even a post-ideological era. To put it simply, the presupposed focus on divergence might hide trends of convergence. This is not to deny conflict. Indeed, I will explicitly look out for different and perhaps antagonistic types of LLL and education held by different actors. However, as the few empirical comparative works on LLL (and the more numerous on education) have shown, the global diffusion of an idea often involves increasing similarities. The causes for such convergence are, however, rarely spelled out.

2.4 Conclusion

Two empirical puzzles and one more theoretical problem have been discussed in the preceding sections. (1) I tried to question whether the rise and diffusion of LLL could be solely (if at all) explained by functionalist approaches. Just as educational expansion in earlier periods was triggered by more than direct functional economic and social requirements (see following Chapter for more detail), it is again now assumed that LLL is much better conceived of as a highly valued cultural good and the symbolic core of a much more complex ideological narrative. We already know that the rapid diffusion among countries supports such assumptions and that the empirical study on organizational diffusion might further corroborate this argument.

(2), more on the theoretical side, I discussed approaches dealing with the question of how to understand IOs and their role in diffusion processes. Rather than concentrating on the most prominent organizations, I advocate a much larger lens through which to detect interest and activities in education in many more, and often new, IOs.

Moreover, rather than being powerful nations' tools and toys, I opt for conceding them much more autonomy than is usually done stressing their highly legitimated status as knowledgeable, professionalized and disinterested guardians of common moral goods. Contrary to most approaches that share this assumption, I want to emphasize that they themselves are only as autonomous as their scripted identity allows them to be.

Furthermore, based on their conception as autonomous “knowledge brokers”, IOs' role in the diffusion or transfer of ideas is to be understood best in terms of normative and cognitive (instead of coercive) impact.

(3) if argued that LLL is better treated as an institution than as a policy as it carries much cultural and ideological material; therefore it is imperative to search for more evidence

pointing in this direction. So far, LLL has unduly been underestimated both theoretically (as a functional necessity, an instrument to dominate countries' education policies and a vehicle for neoliberal thinking on education), conceptually (as an unspecified continuum of deductive ideal types or models) and analytically. The latter is clearly manifest in the numerous studies that attempt to carve out the implications of LLL for adult education. I argued that what is missing is a phenomenological (non-normative) empirical investigation across organizations, i.e., at a level beyond policy implementation (the state) and where these ideas come from, or are at least elaborated the most. This latter aspect cannot be overemphasized. If international actors are assumed to be the locus where ideas are born and elaborated, it is imperative to gain insight into how these ideas are expressed. In this sense, LLL turns into an example for the fabrication of an idea or, more generally, knowledge. From this point, we can knit the “making of lifelong learning” together with its diffusion. We will see in Chapter 3 how tracing the evolution and nature of an idea can be theoretically backed and methodologically structured.

3. Theoretical framework

The following sections intends to address the puzzles identified in the previous chapter and prepare my own analytical framework, drawing on the main tenets of sociological neoinstitutionalism. In this work LLL is treated as an institution and its diffusion as institutionalization. Its diffusion mainly takes place as a process of mimesis which, in turn, is strongly facilitated by its "theorized" character. Theorization as condition, mechanism and content of diffusion finds strong supporters in international organizations.

3.1 Lifelong learning as an institution

Institutionalists have come to analytically distinguish different types of institutions (Table 3.1).[33] The first kind – *regulative* institutions – is self-evident. We (almost) all attempt to play by the rules society has come up with trying to avoid sanctions and punishment. Yet, coercive or enforceable authority has to be reinforced by *norms* that create expectations built into society. "Proper" or "decent" behavior is codified by moral authorities that decide what is "right" and what is "wrong". Here, it is the "logic of appropriateness" (March & Olson 1996:249) that underpin social life.

What is more important for this work, however, is the third pillar, which brings us to the original tenets of the sociology of knowledge. The *cognitive* pillar rests on the interest in institutions as "shared conceptions that constitute the nature of social reality and the frames through which meaning is made [...]" and the permanent process of "mediating between the external world of stimuli and the response of the individual organism [as; M.Z.] a collection of internalized symbolic representations of the world" that has so prominently been emphasized by Berger and Luckmann (1966), for example (Scott 2001:57).

Empirically, institutions might display overlapping characteristics and institutionalization processes overlapping mechanisms. Thus, recurring sanctions might become norms that then become taken for granted and vice versa.[34] This work assumes the opposite process and it is, perhaps, important to note that, in stressing the primarily cognitive, cultural, constitutive and

[33] This cannot be an exhaustive discussion on institutions. See Steinmo (2001) for a discussion about the "old" institutionalists, Rhodes (2006) for the emergence of new institutionalisms after WWII, Immergut (1998) for the similarities between the new institutionalisms, Meyer and Walgenbach (2007) and Peters (2007) for a comparative compendium and DiMaggio and Powell (1991) for a review of sociological institutionalism. Drori and Krücken (2009) provide a brief outline of the development of world polity institutionalism.
[34] This has somewhat divided the neoinstitutionalisms. See Strang and Sine (2002) for a discussion.

ontological nature and effect of institutions, this work differs from the main line of thinking in the literature, especially the body of contributions from economics, political science and sociology that is based on realist[35] assumptions.

Table 3.1: Three pillars of institutions (Scott 1995)

	Pillars		
	Regulative	Normative	Cognitive
Basis of compliance	Expedience	Social obligation	Taken-for-grantedness Shared understanding
Basis of order	Regulative rules	Binding expectations	Constitutive schema
Mechanisms	Coercive	Normative	Mimetic
Logic	Instrumentality	Appropriateness	Orthodoxy
Indicators	Rules Laws Sanctions	Certification Accreditation	Common beliefs Shared logics of action
Basis of legitimacy	Legally sanctioned	Morally governed	Comprehensible Recognizable Culturally supported

To make the distinction between institutional types clearer, we may explore the cognitive form in more detail. Meyer and Rowan – in their seminal *Institutionalized Organizations. Formal Structure as Myth and Ceremony* (1977) – attach three qualities to institutions: (1) they are *rule-like*, which means they are seemingly objective (taken for granted or simply "natural"), external and of long duration. This quality implies that culture and structure become the same in such a way that culturally-dependent institutions impose their constitutive schema on human action.[36]

(2) inasmuch as they are *rational* prescriptions, institutions do not remain vague, abstract or intangible, but suggest concrete patterns of actor definition and action (what and how organizations, professions and even technologies are and are supposed to do). It is important to note here that it is this ontological and constitutive nature of institutions that impacts on the

[35] Meyer (2009) uses *realist* as an umbrella term to subsume those theories that are micro-social in their analysis and rationalistic in their assumption about human action. This includes *functionalist, structuralist* and *rational-choice institutionalist* theories in sociology and the *realist* and *institutionalist* school of thought in political science, particularly in IR scholarship. However, even some of the founding fathers of sociological neoinstitutionalism, DiMaggio (1988) for instance, have subsequently revised their positions and might also fall in this category.

[36] Here, neoinstitutionalists move close to the understanding of institutions in cultural anthropology. In Gehlen's (1975 [1956]: 212) words, they become the "nature artificielle" of human beings and are at the same time "independent and obvious" ("*das Verselbständigte und Selbstverständliche*"); (ibid.: 86);

definition of actors (their creation and identity) *and* their action. Thus, when Mark Blyth (2003) states that "structures do not come with an instruction sheet"[37], it is institutions that imply those structures;

(3) institutions are described as *myths* that create legitimacy (sometimes adherence, always cultural support) and are not necessarily dependent on the *real*, empirically proved functional superiority of a given organizational procedure. In replacing the term *institutions* with that of *rational institutional myths* defined as "[...] rationalized and impersonal prescriptions that identify various social purposes as technical ones and specify in a rule-like way the appropriate means to pursue these technical purposes rationally", Meyer and Rowan (1977:341) further sharpen the constructivist argument. These myths are in an organizational (later world-societal) context:

> "[…] highly institutionalized and this in some measure beyond the discretion of any individual participant or organization. They must, therefore, be taken for granted as legitimate, apart from evaluations of their impact on work outcomes" (ibid.).

3.1.1 World culture and institutions

Where do those institutions or myths come from? Put simply, an actors' immediate and wider environment; in other words its culture. The notion of culture goes far beyond an understanding of it as values, customs or any expressive form (music, arts, or clothing, for instance). It is, instead, to be seen as implying the institutional models of society itself. These models are supported by "cultural theories, ideologies, and prescriptions about how society works or should work to attain collective purposes […]" (Meyer, Boli & Thomas 1987:2).[38] Among these overarching collective purposes are (at least formally) justice or equality and progress.

Following the premises of the sociology of knowledge, Meyer, Boli and Thomas (1987:2) conceptualize Western society "as essentially a cultural project organizing human activity to forge the proper links between the moral and natural worlds". To achieve those ends, society and the state have been organized as purposive entities or as means to the ends mentioned above. This process of social organization is referred to by Meyer et al. (1987) as

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[37] *Structures Do Not Come with an Instruction Sheet* is the title of his article published in *Perspectives on Politics*.

[38] More precisely, "Culture has both an ontological aspect, assigning reality to actors and action, to means and ends; and it has a significatory aspect, endowing actor and action, means and ends, with meaning and legitimacy." (Meyer, Boli & Thomas 1987:6)

rationalization. While the term was still confined to organizations at the early stage of theoretical elaboration it later served to describe a construction method implying “the structuring of everyday life within standardized impersonal rules that constitute social organization as a means to collective purpose” (ibid.:29). Rationalization carries a cultural ideological character, although ideology does not necessarily mean politics:[39]

> “rather than seeing ideology masking unjust conditions of power or material domination, rationalization […] is fundamentally a cultural process that constitutes and elaborates social entities as actors with ontological standing in the collective project of progress and justice” (Drori, Meyer & Hwang 2009:23).

Inasmuch as modern societies are cultural projects, constructed according to a specific principle and around specific collective purposes, social agency itself is equally to be seen as the result of permanent cultural construction. Agency – defined as the “legitimated representation of some legitimated principal” (Meyer & Jepperson 2000:101) – as it now exists, is the result of a long religious and post-religious development. This development can be described as the “ongoing relocation into society of agency originally located in transcendental authority (gods) or in natural forces environing the social system” (ibid.). In the course of Enlightenment, transcendental agency was incrementally secularized and translated into worldly entities, implying a transfer of social agency from God to the church, from the church to the state and, later, to individuals and the citizenship attached to it. It is the agentic response to Weber's *Entzauberung der Welt* (disenchantment of the world) and by-product of the rationalization by which it is accompanied. Neither God nor the church are to be called upon in quest for salvation, but the state and the individual are to blame if progress and justice (instead of salvation) are not achieved.[40]

Speaking of agency, world polity theory recognizes three modern actors that have come to be perceived as the most legitimated ones: states, formal organizations and individuals. The cultural script contains instructions for all of these actors. Every actor on the world society stage draws upon models, prescriptions, blueprints and role models. It is important to make clear that the term *actor* is to be taken literally here.

[39] See Mannheim (1995 [1929]) for a similar use of the term.
[40] And indeed, Boli, Thomas and Meyer (1987) attribute a quasi-religious character to world-cultural accounts. See Berger, Berger and Kellner (1975:59) for a similar argument.

Instead of seeing *individuals* as "some supposedly natural or primordial entity [...]" they are one of the "most culturally elaborated and legally supported constructions of the modern system […] (Meyer 1988:56f.). Institutionalized life phases (from ECCE to retirement) and a wide range of counselors (from teachers to therapists) help in turning life into an "orderly project" (Meyer 1986a:200).

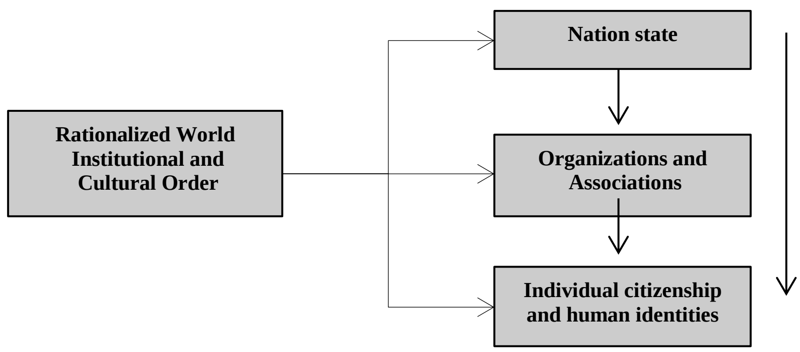
Organizations are structured around goals of efficiency, paying high prices for external consultants and readily copying other, seemingly successful, organizations believing that there is a truly efficient way to structure organizational life.

This is also true in the case of *nation-states*. In an emblematic phrase, world polity thinking on nation-state actors could be summarized as "no nation-state is an island" (Meyer et al. 1997); states turn to other states and IOs looking for institutional designs (including constitutions, armies, education); (see below).

However, this reciprocal "inspiration" leading to isomorphism has an overarching meta-script that reflects the myths and principles described as rationality, progress and justice. Those myths underpin the construction of actor identity and its maintenance as they are the ultimate source of legitimacy, and they do so more and more, globally.

The reference to *scripts* is to indicate the understanding of agency in world polity theory. Contrary to "realist" theories, world polity theory takes a somewhat radical phenomenological or constructivist position (Figure 3.1).

Figure 3.1: The World as enactment of culture (Meyer et al. 1997)



In using Goffman's (1959) social psychological perspective of the theatrical presentation of the self in everyday life, neoinstitutionalists attempt to dethrone "the hard-boiled calculation of interests assumed by rationalistic actor-centric approaches" (Meyer et al. 1997:151). In this sense, rationalistic theories, and the functionalist or conflict theoretical assumptions they might contain, are cultural expressions themselves and can only be explained by drawing on the notion of *culture* (and are not depictions of a natural or primordial preference structure).

Further, as in Goffman's description of social interaction, actors perform on a setting made up of a front stage and a back stage. In this sense, all world-societal actors (individuals, organizations and states) recognize a formal and an informal activity structure, with the two often being decoupled from each other (see below).

3.1.2 Education as an institution

Education has always been at the core of empirical efforts from a neoinstitutionalist perspective and many of the now more general theoretical arguments arose out of the analysis of global educational expansion. Neoinstitutionalists were puzzled by the fact that "despite much variation in level of industrialization, class structure, and political regime, the ideological and organizational responses of the various countries to challenges to state power were strikingly similar" (Ramirez & Boli 1987:9). These responses included national declarations of interest in mass education, compulsory enrollment legislation, establishment of public education agencies (ministries or departments) and public supervision.

In explaining this puzzle, the authors rely on the notion of myth to characterize the constructs of modern societies: the individual, the national, progress, socialization, and the state, in other words "the secular procedure for constructing the individual" (Boli, Ramirez & Meyer 1985:150) and the rise of the nation-state and the construction of a national society (Ramirez & Boli 1987). As the result of long centuries of Reformation and Counter-Reformation, the expansion of capitalism and the institutionalization of the state and interstate system, these myths came to constitute the institutionalized environment surrounding and shaping the then-emerging nation-state identity, at whose core had been education. It becomes evident that this position fundamentally differs from the functionalist and conflict theoretical accounts introduced earlier in this work.

An iterative process of empirical works and theory-building followed to further back up the institutionalist argument for education. Studies on the enrollment in primary and secondary education have been most prominent, finding universal compulsory primary education legislation worldwide and (formal) enrollment for more than 90% of the world's children (Meyer et al. 1977; Ramirez & Ventresca 1992; Meyer, Ramirez & Soysal 1992).

Similarly, dramatic increases have been reported for higher education where enrollment expands by factors of ten and twenty for the period after 1950 (Meyer & Schofer 2004). Less developed countries in Africa or Asia have now higher enrollments than did core OECD countries like Germany or England thirty years ago. More universities have been founded in the decades after 1945 than in all centuries before. For neoinstitutionalists, higher education has become

> "part of a global model of society and of education. […] gaining power on a worldwide scale not because the world's societies are so similar but because their goal similarly focus on socio-economic progress and because education is seen in all dominant world ideologies as the main means to achieve progress." (ibid.:60).

Further, universities keep eliminating access barriers for certain groups (e.g. for women, see Bradley & Ramirez 1996). Additionally, Jakobi (2006) was able to show a globally increasing interest in vocational education. This is the main result of her study, presented in the previous chapter.

Not only have formal enrollment rates been studied, so too have structure and content of education. Benavot & Riddle (1988) show worldwide standardization in the form of the 6-3-3 years model advanced by UNESCO. In an analysis containing between 31 and 82 countries in the period from 1920 to 1986[41], Benavot et al. (1991) found that a core of liberal subjects[42] had emerged, dominating curricula in highly diverse countries across the world (including very poor and very rich countries). Similar trends towards the American "social studies" model and a de-territorialized and de-nationalized curriculum stressing global humanity and the general ecosystem have been backed by Wong (1991) and Rauner (1998). Pedagogically, a cross-national shift away from canonical learning towards active student-centered learning is documented for science studies in McEneaney's (1998) analysis.

With regard to the political organization of education, ministries of education have become a universal reality (Ramirez & Ventresca 1992) and professionalized (often state-controlled) teacher training is advanced, even in cases where local realities are far from favorable (Meyer 1998).

Neoinstitutionalists argue that explaining such large-scale trends of educationalization and "world educational standardization" (Benavot et al. 1991:91) requires jettisoning functional and conflict theoretical tenets. Instead, they propose to turn to historical, institutional and cognitive forces that emanate from the Western, Christian, post-Enlightenment tradition. As

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[41] This variation is due to lack in data coverage. Information about curricula in the period prior to WWII was patchier than in the decades following it.

[42] Containing instruction in (official) language, mathematics, natural science, liberal or general social sciences, the arts, and physical education.

these forces are becoming increasingly global in structure and impact, they condense into a set of collectively shared, highly legitimated cultural principles (progress and justice) that make for the fabric of world polity or world culture.[43] Similar trends towards homogeneity or isomorphism have later been studied in the same large cross-national longitudinal designs for other areas of social life, including human rights, the environment, management, law and welfare policies.[44]

It is this empirical body on worldwide educational change and the theoretical focus on the role of international organizations that turns neoinstitutionalist theory into a highly useful point of departure for this study.

3.2 Diffusion and theorization

We saw earlier in this work (Sections 2.2.2 and 2.3.1) that most research on the movement of ideas is marked by rationalistic and functionalistic assumptions. Both sending and receiving processes (policy transfer, borrowing and lending, adoption and imposition, etc.) suggest that either the sender or adopter rationally chooses a policy from the menu at hand. This conceptualization does not change when policies are replaced by ideas, concepts or models. They are short-sighted, inasmuch as they do not see the cultural construction and structuration at work, spurred by the fact that, in “the contemporary world, marked by the obliteration of nonmodern communities, both practice and adopter are likely to be modern” (Strang & Meyer 1993:510). Only upon encountering obstacles in the form of nonmodern societies, does the cultural boundedness of practices becomes visible as such.

Understanding the construction of social reality means making the culture involved visible by accompanying the institutionalization process. Institutionalization here “is the process by which a given set of units and a pattern of activities come to be normatively and cognitively held in place, and practically taken for granted as lawful (whether as a matter of formal law, custom, or knowledge)” (Meyer, Boli & Thomas 1987:2).

And, again, we have to consider the cultural roots that render institutionalization in modern societies so distinct.

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[43] Early contributions preferred *world polity*. More lately, *world culture* or *world society* have also been used to describe the approach. Note that in any case *world* denotes the departure from the more meso-sociological analyses in earlier organization studies and a growing interest in macro-sociological global phenomena. The recently introduced *society* might point to the growing integration of social theory.

[44] See Drori and Krücken (2009) for a compilation.

> "In the Western tradition, rules become institutionalized as they are linked more closely to universal moral authority and lawful order in nature. They are institutionalized as they become more complete and integrated accounts of social activity in a given domain and as they provide more explanations of more aspects of that activity. They are institutionalized as they become more invisible and eliminate more alternatives. Hence, they become institutionalized as they become less challengeable and less subject to manipulation by the people involved." (ibid.1987:37).

Institutionalization, as it is defined here, implies diffusion, since institutions either spread to areas of human activity where there have not been institutions before or diffusion leads to the substitution of established institutions by new ones. The effect of a given new institution on the actor and her or his action implies change. Upon entering into areas of social life, new practices and norms – usually in patterned forms – invoke affective, behavioral and cognitive, at the least symbolic or ceremonial, change. If diffusion or institutionalization of a given set of rules becomes the single most legitimated pattern of activity, we may speak of isomorphism (Meyer & Rowan 1977; Scott 2001).

We can further specify what conditions facilitates diffusion if we draw again on the legitimating myths of world culture: rationality and universality. Taking these principles at face value, diffusion in modern societies can be seen as *theorization*. This deserves further mention.

In the neoinstitutionalist perspective, the rational adoption of a given innovation (be it an idea, a social or technological practice, organizational form or identity) is only half the story. Again, starting from the constructivist position of an externally-generated identity-formation, Strang and Meyer (1993:493) identify *theorization* as the prerequisite and accelerator of diffusion processes. By theorization they mean "[...] the self-conscious development and specification of abstract categories and the formulation of patterned relationships such as chains of cause and effect." These abstract *cultural categories* are made of actors whose "cognitive map identifies reference groups that bound social comparison processes." (ibid.:491). Among the social entities or actors are individuals, organizations and nation-states. The underlying theorization suggests perceptions of strong similarity and their cultural linkages then outstrip any direct relations in creating diffusion. Put simply, organizations recognize each other as such, as they presumably share the same form and functioning. They seem, to us, as internally consistent, and much policy-making that is accompanied by professions reinforces this impression. However, they only suggest their coherence through built-in theories or general *models*.[45]

Theoretical models generally contain a good deal of abstraction, simplification, typologies and generalizations about cause and effect chains. They can vary in complexity and abstraction (from “smoking is harmful” to the “analysis of trade patterns and location of economic activity"[46]), but they tend to higher levels of abstraction to allow for universal relevance in the specific and related categories. Theorization is not necessarily scientific in the strict sense, but is much more successful if so. The theories proposed have to resonate with the cultural environment they meet or, in other words, they have to be institutionalizable if they do not want to be decried as specialized, marginal, exotic or even esoteric. In modern, rationalized societies functional models are therefore all the more successful:

> “The seductiveness of the model, thus, arises because of the functional theories involved fit the culture of the system itself, and its language for describing itself. Therein lies the fundamental error of naive uses of the model: they do not take into acccount that the model itself is a main cultural element, and works as culture more than as some sort of technical reality.” (Meyer 1992:91).

Theorization does not only spell out the cultural category, nor does it confine itself to instilling those categories with plausible identity traits. It also defines *adopters*. Theorization identifies *adopting populations*, which again supposedly share a similar identity and social practice. They are homogeneous in the *theoretical* perspective and receive their respective script of how to behave appropriately. Strang and Meyer (1993) mention the example of psychological research discovering children's need for creative play, which might result in curricular reform or the discovery of different forms of autism or dyslexia, leading, at the same time, to homogenization (within the new population) and heterogenization (when compared to other populations).[47]

As a consequence, individuals are advised to adopt theorized, that is to say, generalized therapies, organizations are to embrace universalized management schemes and nation states are to pursue generic strategies for economic growth.

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[45] Similarly, DiMaggio (1988:15) calls those models “public theories” defined as “legitimating accounts that organizational entrepreneurs advance” about specific issue areas such as the labor market, the consumer market and so on. He differs, however, in assuming a rational and strategic behavior.

[46] The 2008 Sveriges Riksbank Prize in Economic Sciences in Memory of Alfred Nobel was awarded to Paul Krugman for his work on this subject.

[47] This assertion is close to Wenning's (1999) work on the German education system, yet with different conclusions.

Once the category is defined (e.g. the state) and the adopter is selected (e.g. schools, teachers, students), theorists also specify practices (e.g. curricular reform). Armed with notions of efficiency, justice or progress, simplified and abstracted accounts of practices are proposed to change the *status quo* for the better.

That said, it becomes evident that diffusion is based on identity-generation and group-definition and that theorization itself is both a condition for and the mechanism by which diffusion takes place. Less often stated, since it might seem trivial, is that theories and theorization (as a mode of describing social reality) are also the *content* of diffusion.

> "If theorization shapes diffusion, what flows is not a copy of some practice existing elsewhere. When theorists are the carriers of the practice or theorization itself is the diffusion mechanism, it is the theoretical model that is likely to flow. Such models are neither complete nor unbiased depictions of existing practices. Instead, actual practices are interpreted as partial, flawed, or corrupt implementations of theoretical ones." (Strang & Meyer 1993:493)

The more theorized models become legitimated in organizing political, economic, organizational and, always, social worlds, – as is usually the case in policy-making –, the more the actual practices of individuals, organizations and states are under scrutiny and the more likely the observer (usually a social scientist) will find *decoupling*.

Decoupling can be found between models and practices, i.e. between the ideally assumed motivations and capacities and the actual motivations and capacities of actors. This is true for individuals, organizations and states alike, since all might decouple their formal, symbolic and ceremonial commitment from actual, informal behavior, as with the Goffmanian (1959) every-day individual, the "garbage can" organization (Cohen, March & Olsen 1972) and the imaginary island society (Meyer et al. 1997).

Especially important becomes the concept of decoupling in the context of a work that looks at the diffusion of world cultural models beyond the OECD (the core of world culture). Here, the neoinstitutionalist notion of globalization describing "the expanded flow of instrumental culture around the world", which means that "[…] common models of social order become authoritative in many different social settings" (Meyer 2000:235), helps to understand what happens if models flow to those areas where resources and culture are less susceptible for the easy adoption of a theorized model. Meyer et al. (1997:154) describe the causes:

> "Decoupling is endemic because nation-states are modeled on an external culture that cannot simply be imported wholesale as a fully functioning system […]. World culture contains a good many variants of the dominant models, which leads to the eclectic adoption of conflicting principles. [...] Some external elements are easier to copy than

> others, and many external elements are inconsistent with local practices, requirements, and cost structures. Even more problematic, world cultural models are highly idealized and internally inconsistent, making them in principle impossible to actualize […].”

Chronic reform efforts follow and might even become pathological. As a consequence,

> “One can see the manic quality of formal organizing most clearly in the peripheries of the modern system, where external pressures make elaborate organizations seem crucial in the struggle against failure and entropy.”

Thus, the more world cultural blueprints of development (see Chabbott 2003 in 1.3.2) penetrate countries, the more their internal structure demands to be elaborated. Further, the more this internal structure needs to be elaborated according to externally-generated beliefs, the more it removes itself from local needs *and* local capabilities:

> “The structuration of the nation-state greatly exceeds any functional requirements of society, especially in peripheral countries. Impoverished countries routinely establish universities producing overqualified personnel, national planning agencies writing unrealistic five-year plans, national airlines that require heavy subsidization, and freeways leading nowhere – forms of “development” that are functionally quite irrational.” (Meyer at al. 1997:156)

That is not to say that states should not establish universities, or not plan their economy or whatever the development model in question proposes, it is only to point that, more often than not, universalistic claims of general applicability are more of a mythical and culturally-supported credo than a convincing example of evidence-based policy-making. The argument has encountered great controversies, since it attacks the core of both descriptive and normative functional theories.

In general, this model of diffusion, centering on institutionalization, theorization and decoupling, fundamentally differs from the simple assumption of rational actors picking the best option in order to maximize utility – with utility being an objective measure and preferences of actors unchanging and stable. Inasmuch as theorization establishes a new logic of appropriateness and orthodoxy, it also constitutes what the best (or rational) choice is. The model also departs from the assumption that direct interaction is necessary for diffusion. Admittedly, such a condition might spur diffusion, but it is neither necessary nor sufficient. Instead, theorization “facilitates communication between strangers by providing a language that does not presume directly shared experience” (Strang & Meyer 1993:496).

3.3 International organizations as theorists

If world culture is made of scripts and diffusion conditioned by and made of theorization, it is imperative to elaborate more on the scriptwriter or *theorists*. As we have already seen, world society is basically conceptualized around three kinds of actors: states, organizations and individuals.

These actors are surrounded by an exponentially growing number of (increasingly globally) organized professional associations, non-governmental and intergovernmental organizations that serve as "others" (see below). They provide advice on any number of areas of modern life: legal, economic, social, political, educational, medical, recreational and religious.

To be clear, all these surrounding actors (or rather entities) might be active in creating cultural material, adding model after model to structure and penetrate ever more areas of social and individual worlds, but they are not less affected by the institutionalized myths. On the contrary, they are themselves actors in an historical-cultural drama, modernity, that is far beyond their influence. To emphasize this quality, neoinstitutionalists frequently refer to these actors as agents of wider cultural goods or "rationalized others" – a reference to Mead's generalized others who serve as a fund of expectations of how to act in world society (Meyer at al. 1997:165).

They derive much of their authority from the fact that they seem to accumulate rationalistic and universalistic knowledge within their bodies. This knowledge, in turn, is generated by its highly professionalized and scientific personnel. World polity researchers point to the powerful role of these architects of the world polity edifice:

> "The new religious elites are the professionals, researchers, scientists, and intellectuals who write secularized and unconditionally universalistic versions of the salvation story, along with the managers, legislators, and policy-makers who believe the story fervently and pursue it relentlessly." (Meyer et al. 1997:174)

It is this combination of apparently objective and disinterested organizations, operating only on behalf of the world cultural myths of progress and justice together with the scientific and professional models and methods to put them into practice, that gives so much credibility and legitimacy to IOs. In this sense, they are "active champions of central elements of world culture" and showcase "instruments of shared modernity" (Meyer et al. 1997:164).

The activities of the actors already indicate some of the features of the current world polity as being (1) expansive, (2) heterogeneous, (3) dynamic and (4) loosely organized or decentralized (Drori et al. 2003).

World polity is (1) expansive, in that the number of nation-states, formal organizations and IOs (both governmental and non-governmental) are rapidly increasing in numbers in virtually all world regions (albeit often based in Western societies).

It is also (2) heterogeneous in both type of organization and substantive issues. Nation-actors (as the principal actors in world society) sit alongside IGOs and INGOs as well as social movements, forming a multi-actor web with multiple knots and vertically-structured levels. The set of actors described in governance research, and as depicted in the global welfare mix, may suffice to demonstrate this heterogeneity (see Section 2.2.1). For IOs, we can say that, while being heterogeneous in terms of type, they are, nonetheless, bound by common goals and principles (progress and rationality) and we can treat them as organized in a global organizational field of development, as in Chabbott's (2003) work (Section 1.3.2).

Its dynamic is the (3) characteristic and clearly articulated in the context of historic turning points. Drori et al. (2003) point to the late 19th century (Enlightenment merging with European nationalism), the end of WWI and WWII and the fall of the Berlin Wall as moments of change in world polity. The world wars in particular initially led to stagnation or reduction of world-societal integration; their end, however, ushered in all the more effort to bring nations together, as documented by the rise of IOs. Not only is the field of actors involved dynamic (*polity*), but so is world *culture* itself (as content or material of world polity). While ecological concerns did not appear on the international agenda before the 1970s, it can be called an overriding priority (at least ceremonially) ever since (Meyer et al. 1997). The reverse dynamic can be observed for eugenics. Pushed to the macabre limits in Nazi Germany, it lost its legitimacy afterwards and has (almost) completely disappeared from the front stage of international politics (Barrett & Frank 1999). Education might perfectly serve as another example.

Ultimately, (4) world polity is described as loosely coupled and decentralized. It is there where neoinstitutionalists move close to political science and borrow its *governance* concept. World polity has not repeated on a global level what national societies have done (or let do) on a national. Although nation-states might be the key actors in this governance web, untiringly referring to their sovereignty, they are by no means the sole ones. They share the world stage with other actors. Among those are international civil society organizations and state-backed IOs. Of the latter, the UN system is a salient example that world culture can create and keep together IOs as vehicles for myth-like missions, but not equip them with the power to enforce that mission.

The mechanisms of loosely-coupled compliance replicate at the world cultural level in that actors formally commit themselves to soft (moral) law (ratifying a human rights convention, for instance), but do not automatically comply to them “back stage” (or do so with delay in some instances).

What follows from this statelessness is (a) that “almost all the interests that push for sociopolitical regulation in the world work toward building a broad world polity of shared rules and models, rather than trying to assemble a stronger world state bureaucracy” (Meyer 2000:239). These interests are articulated by diverse actors (from nation-states to social movements and intellectuals) and are diverse (and often contradictory) in nature. Their contradictions derive from myths that are sometimes hard to reconcile (liberty and equality, socioeconomic progress and sustainability). These diverse interests are further translated into sometimes soft, sometimes binding, cultural (and scientifically backed) rules of how to plan (or not plan) an economy, how to build education systems, how to design welfare policies and how to protect individual rights. The channels through which those rules are expressed are often IOs.

A (b) consequence of this decentralized structure is that, as long as there is no controlling force, world polity is likely to expand, in that new problems are identified, culturally (including scientifically) elaborated and internationalized (see the recent attention given to early childhood care and education). The identification of these problems (usually by scientists) is highly praised and prized[48] and their role in diffusing world cultural institutions is crucial.

If we recall the dominant conceptualization of these IOs in the discipline that is traditionally most concerned with it, political science in its IR strand, we see that neoinstitutionalists hold profoundly different arguments. Instead of imagining international actors as acting at the behest and on the behalf of powerful nations, world polity theory conceives of them as autonomous agents of wider principles. Instead of stressing their capacities to solve problems as in neoliberal/ institutionalist regime theory (Krasner 1983; Parreira do Amaral 2011), for instance, sociological institutionalists point to legitimated and idealistic globally-available models, decoupling and pathologies (Meyer et al. 1997). And, instead of stressing imposition,

[48] Nobel Prizes are only one (albeit telling) indication for this. Intellectuals concerned about world problems in general are highly regarded, all the more true for scientists (Drori et al. 2003).

coercion and regulation, as in neorealist IR and some contributions from comparative education, the main source of authority for IOs in world culture explanations is their worldwide legitimacy.

Note that even constructionists in IR, while emphasizing normative and cognitive instruments of governance in often very specific areas (a legacy of regime theory), make no reference to the wider social and cultural structure, in which these norms are embedded, how they hold together or were they come from, historically.[49] Similar criticism holds true in the case of global social policy studies (Deacon 2007) where ideas and ideologies have come to "matter"; they remain analytically and theoretically isolated.

3.4 Implications for the study of lifelong learning and analytical framework

Unlike in previous chapters I want to conclude with an analytical framework that allows sharpening the focus in the following empirical investigations. The framework intends to bring together the relevant assumptions from world polity thinking and an additional element from other strands, notably global social policy research and international relations scholarship. The additional element is politico-ideological conflict and the divergent positions on policy issues that follow from it.

We saw that comparatists from education and social policy stress the contestedness of ideas in the international realm, while neoinstitutionalists focus on worldwide cultural/institutional processes of isomorphism. The former occasionally dismiss neoinstitutionalism as an analytical route on account of their lack of conflict vocabulary.[50]

Far from negating conflict, neoinstitutionalists, with their macroscopic focus, nonetheless emphasize that conflict arises from modernization itself as "internal contradictions and inconsistencies in world-cultural models (that, M.Z.) make certain forms of struggle inevitable in world society" (Meyer et al. 1997:168-169). The most prominent contradictions are between such highly valued goods as equality (versus liberty), progress (versus justice and equality), standardization (versus diversity and individuality) and efficiency (versus individuality and equality). These contradictions can occur on different levels of world society, i.e. on the individual, organizational or national level, where "adherents of competing

[49] See Finnemore (1996) for a similar argument.
[50] Such positions can be found in Schriewer (2007) and Deacon (2010).

models suspiciously regard others as violators of quasi-sacred definitions and boundaries" (ibid.:172).

If we translate Deacon's (2007) global class struggle into the belief system (Scott 1994) that reigns in the global organization field of education, it becomes possible to direct our attention to the potential exclusiveness, or contestedness, of beliefs in global education-building, as shown in Table 3.2.

It would then be possible to identify different belief systems, as expressed in potentially competing models of LLL and the specific constellation in which they are ordered (from one single dominant to many dominant systems).

Table 3.2: Extent of exclusiveness of belief systems in organizational fields (Scott 1994)

one single, exclusive and dominating belief system	single dominant belief system with alternative secondary forms	meta-institutional belief systems overarching contextual variation	two or more strong, competing or conflicting belief systems

We saw in Chapter 1 that comparative education researchers propose to speak of different models of lifelong learning. Such variety would allow distinguishing the cleavages in the material produced by IOs.

In this reading, world polity would not only be heterogeneous, expansive and dynamic, but also contested. However, we have to add another form of contestation. We know from Chabbott's (2003:89) work, which is perhaps closest to this work in scope and level of analysis (though not in methodology), that two highly disputed claims exist in the field of international development: (1) "universally applicable scientific knowledge and (2) objective, essentially apolitical decision making". While the latter can be indirectly found in the politico-ideological conflicts described above, the critical view on the use of knowledge might direct our attention again to the epistemological nature of modernity, its rationality and universalism that translates into theorization as a condition for, mechanism and content of diffusion.

Aside from this additional focus on conflict, it is helpful to recall that education in neoinstitutionalism has been characterized as (1) "as institutionally chartered to be universal, standardized, and rationalized"; (2) as "very highly institutionalized at a very general collective level"; and (3) as "institutionally chartered to conduct the socialization of the individual as the central social unit" (Boli, Ramirez & Meyer 1985:147-149). This carries important implications for the analysis of LLL.

The first element in the definition is an epistemological one and we saw in this section that theorization is at the heart of diffusion processes and based on these very principles of universality, standardization and rationality.

When Leuze, Martens and Rusconi (2007:9) state that neoinstitutionalists "demonstrate that IOs do matter and have a significant impact on the global diffusion of a model; however, they leave open the question how governance is exercised", the authors miss the important point that theorization of a model is the prerequisite, condition and substance of governance; put simply, diffusion by theorization is governance. This holds true in light of all the normative governance mechanisms discussed in Section 2.2.2.

An analysis of LLL models and their theorization would, then, need to pay heed to such features as one explanation for their potentially fast and global diffusion. It would be in line with the theorization argument to look for the definition of adopters, the assumed links between LLL and the legitimated goals in modern societies (development and justice). However, bearing in mind that LLL models are abstracted, stylized and idealized, it would not be surprising to find some evidence of decoupling, especially where the claims are most unrealistic, i.e., in poorer areas. Further, we can display these epistemological features as primarily cultural ones (Western and modern) by closely examining their ideological character when meeting nonmodern adopting populations.

Further, the "very general collective level" mentioned in the (2) element can be specified by saying that it is world culture where institutionalization occurs. Analogously, for LLL, this work assumes that it is currently undergoing a world cultural institutionalization. We see some evidence for such an assumption on the nation state level in Jakobi's (2006) work. I will, instead, search for such institutionalization indicators in the statements of a wide variety of organizations that might be considered as representing world culture much more directly. Instances of world cultural manifestations in LLL documents might, for example, be represented by strong references to education and LLL as a human right.

The (3) argument is more a substantive and ontological one, as it concerns the content of education and LLL and the entity that is constructed within this content. As seen in an earlier chapter, the construction of the individual can be seen reinforced through the rise of LLL, in that the system-based education of individuals shifts towards the individualized learning process (see Section 1.1.1). Now that we assume LLL gains much ground in nation states around the world, presumably paralleled by IOs around the world, it would only be plausible to foresee a proliferation of notions of individuality, since these represent the ultimate locus of action in the eyes of actors (IOs) that do not serve national (let alone nationalist) ends, but the purpose of more abstract and general goods (i.e. human rights).

Figure 3.2 below “zooms in” on the upper part of Chabbott's (2003) top-down process of world cultural dynamics. It is here where my analysis is located. The level of analysis is macroscopic and the analytical unit organizational. The ellipse in the middle of the model contains those actors for which we can ascertain their role in the organizational field of education. The question marks indicate the large number of organizations that might be part of this field, but of which we do not as yet know for sure. The dotted line around the ellipse is to make clear that the boundaries are highly fluid, with organizations entering and leaving at given moments or being present in numerous organizational fields at the same time. The field is permeable, both with regard to its members *and* with regard to the cultural material that flows through it. This is important to note, since it highlights the constructed quality of organizations (Meyer 2010).

The field is believed to both produce and diffuse either a single dominant model of LLL or different, and possibly conflicting, models of LLL. Regardless, we can state that the organizational field is likely to be expansive (in number, size and “output”, publications, for example) and dynamic. The latter would not least be found in recent commitments to education and LLL.

From much neoinstitutionalist empirical work on education, we can already assume that models of LLL are necessarily models of development (both individual and collective). From more theoretical accounts, we can deduce that the content of LLL is likely to be expressed in theorized epistemology.

In order to explain both the existence and status of IOs and the emergence and nature of LLL, we have to move to the upper level, where world cultural goals and principles legitimate IOs, since these represent the goals and principles like no other actor in world society. We can deduce from this assumption that organizations that represent such goals as progress and development (or more narrowly growth), as expressed in their missions, mandates and aims, are likely to embrace education and lifelong learning, inasmuch as they have come to be seen as the ultimate means to achieve those goals. It is this middle ground that is to be explored in the quantitative analysis when looking at the possibly heterogeneous, but substantially unified composition and the expansive and dynamic behavior of the field.

Moreover, world culture does not only shape the organizational field, it largely determines what this field produces (or enacts), as indicated by the flashes that directly meet the level of outcome. The epistemological range of features built-into models of lifelong learning is not infinite. On the contrary, world culture holds a more or less narrow set of core ideas that form the pillars of one inclusive or integrated model, or more than one model that would rest more heavily on one of the pillars.

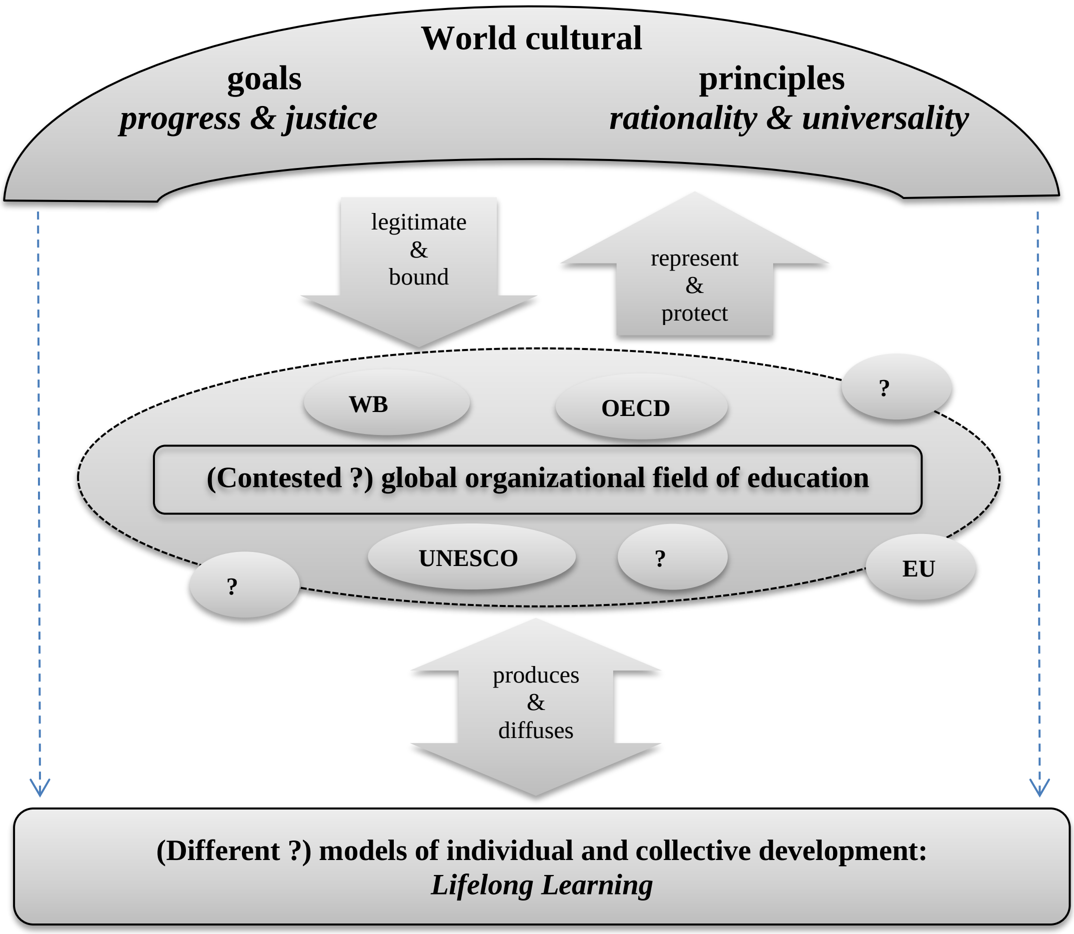
It is the main task of the qualitative work to identify these pillars and their relevance for specific actors and their relation to each other. It is these relations to each other that would allow speaking of a structural model of LLL.

In this sense, LLL is likely to be pinned to precise means of individual and collective development, with a strong emphasis on equity (or equality), as, for example, in discussing access to education for underprivileged groups. The models we met in Chapter 1, which each put a premium on different notions of development (from holistic to economic), might serve as a continuum to delineate types of LLL.

With regard to principles, we can expect LLL to be formulated in de-contextualized, de-temporalized and de-localized, in short, theorized, epistemology (*universality*). The specific *rational* aspect is its scientific underpinning. We saw that early models of LLL, as advanced by CoE, UNESCO and OECD, were strongly idealistic and made their way without much to say on the *evidenced* benefits of education. It is likely that such ideals are still there in LLL as the cherished goals. According to this model, however, they would not suffice[51] and LLL would now be promoted with the support of an extensive range of scientific contributions (from education, sociology, psychology, economics, law and so on) that shows the exact effects of education on a wide array of individual and collective phenomena.

[51] As little as would arguments based on religion (or spiritual/transcendental/ superstitious accounts), tradition, kinship or the nation-state.

Figure 3.2.: A world cultural model of the emergence and spread of lifelong learning (own account)



4. Methodology

Research in this work intends to test several hypotheses and answer several research questions simultaneously; each of these steps is best addressed in a distinct way (Table 4.1). In detail, this means combining quantitative with qualitative methods. While the emergence of a global organizational field of education and the overall diffusion of the LLL idea might be well demonstrated in longitudinal models, organizations' positions towards LLL is best explored by a qualitative in-depth analysis of relevant official documents. Such an approach might be called *mixed method* or *perspective triangulation* design; although not the more common *between-method triangulation*, since different research goals are addressed by different strategies (Flick 2007).

Table 4.1: Synopsis of study design

Analytical problem	**Hypotheses/ research questions**	**Variables/ Heuristic categories**	**Methodical approach**
Quantitative analysis			
(1) *Heterogeneity, boundedness and expansion of the organizational field*	The field is heterogeneous, but bound by a single belief system made of development, progress and growth. The field is expansive in foundations, staff, budget, members and publications.	- mission statements - foundations - staff - budget - members - publication type	trend analysis quantitative content analysis
(2) *Dynamics and diffusion in the organizational field*	IOs enlarge their mission committing themselves to education and LLL. There is a significant increase in the number of organizations referring to LLL in the period 1990-2013.	- reference to education - reference to LLL	quantitative content analysis regression analysis
Qualitative analysis			
(3) *Substance of diffusion*	Do IOs have and promote a model of LLL? Are there different and/ or conflicting models of LLL?	- educational actors - purpose of education - governance of education - sectors of education - welfare contexts	qualitative analysis/ GTM

The following sections will explain the study design and the methodical approaches for each of these two subsequent steps.

4.1 Statistical analysis

4.1.1 Hypotheses and definitions

Based on the empirical indicators and theoretical assumptions introduced in Chapter 3 (theoretical and analytical framework), this work intends to investigate whether the global organizational field of education, as conceived of as analogous to features of world polity, is (1) heterogeneous, but bound by a single belief system, (2) expansive and (3) dynamic.

H1: The organizational fieldof education is heterogeneous by type, staff, budget, publications, age and area, but bound by a single common belief system made of notions of development, progress and growth.

H2: The organizational fieldof education has expanded in the period from 1954 to 2013.

H2.1: The organizational field of education experiences significant growth in foundations of international organizations over time.

H2.2: Once created, international organizations experience significant growth in members (member countries or individual members) over time.

H2.3: Once created, international organizations experience significant growth in full-time, paid staff over time.

H2.4: Once created, international organizations experience significant growth in budget over time.

H2.5: Once created, international organizations experience significant growth in types of publications over time.

Definition of the period (1954-2013) is motivated by the finding that world polity considerably emerged and expanded after WWII (Drori et al. 2003; see previous chapter). At the same time, as we will see below, data is difficult to obtain for the earliest decades and many of the organizations from the sample are rather recent ones. The aim is to trace back the evolution of the field as far as possible without unduly reducing the sample.

H3: The organizational field is dynamic.

H3.1: Once created, international organizations enlarge their mission, i.e start to become interested and active in educational matters in general, as operationalized through reference to education in publications.

H3.2: Once created, international organizations enlarge their mission, i.e. start to become interested and active in lifelong learning, as operationalized through reference to lifelong learning in publications.

H3.3: The diffusion of lifelong learning does not vary with the type of international organization, its geographical location or age.

The filter[52] in H3.1 and H3.2 are defined dictionaries of key terms for four languages (English, French, Spanish and Portuguese; Appendix B.1) This filter is a narrower semantic focus compared to earlier studies where *lifelong learning* was seen as equivalent to and used interchangeably with *lifelong education*, *continuous education*, *lifelong training* and other related, but – in my view – not identically connoted terms (Jakobi 2006). Such a broad semantic scope risks losing a grip on what LLL, as it now can be found, means. Above all, the inclusion of earlier concepts, such as *lifelong education*, might blur the boundaries even though an organization might use the term while meaning LLL. For these cases, this study can not control.

Definitions of organizational types, geographical areas and age (H3.3) can be found in Appendix A. With regard to area, literature on LLL and world polity diffusion in general suggests to see diffusion regardless of any specific location.

4.1.2 Data collection and sampling I: selecting organizations

The sampling design is based on a purposive strategy. The primary consideration of this work is to reconstruct an historical process and to describe a phenomenon, rather than estimating the prevalence of a certain feature in a larger study population (IOs in general).

There are five overlapping and mutually corroborating empirical and theoretical criteria for selecting organizations. (1) based on the available body of empirical evidence, I will include those organization that showed themselves interested in or committed to educational goals, in particular with explicit reference to LLL and its predecessors, *permanent education* (Council of Europe), *lifelong education* (UNESCO) and *recurrent education* (OECD); (see 1.3.1). Moreover, previous studies, as presented in Section 1.2.1 and 1.3.3, have already investigated work done by WB, ILO and Commonwealth of Learning. To limit the field, other

[52] The vast majority of documents were in PDF-format. I decided to use Adobe Reader 9 and its elaborated search function, thereby allowing searching of entire folders and outputting detailed lists with those files containing the words searched for. Only three documents were screenshots, which have been analyzed manually.

organizations (e.g. UNDP) that have been identified as having abandoned work on education are not considered (Jones 2006).

(2) in contrast to this “safe” approach, I deliberately include organizations that have, so far, been completely out of the scope of the relevant literature on LLL. Among these are development banks, global philanthropy organizations, international trade unions and business organizations as well as regional intergovernmental bodies mainly located in non-OECD regions. Given the fact that such organizations have increasingly committed themselves to social policy issues (for example, see the global welfare mix in Section 2.2.1), and since social policy and education policy can be considered being of some propinquity, the inclusion of primarily social policy actors in the analysis might reveal their hitherto neglected interest and potential relevance in educational matters.

(3) historically, labor unions and business associations have been strongly involved in adult education. There is a vast literature[53] that shows the role of these actors in training during 19th century industrialization. Labor unions have also been important in educating workers in more political and civic matters (including class struggle). In German-speaking and some Scandinavian countries, employers still assume a significant role in the training of young workers (the so-called dual system).

The relevant literature on LLL provides a (4) selection criteria. Many contributions situate LLL in the context of a global knowledge economy (Hasan 1996; Jakobi 2006). One of the *a priori* models of LLL has even been defined in human capital terms. There are IOs that – at first glance – have no overt and direct interest in LLL matters (such as mainly economic organizations, like NAFTA). Excluding organizations (WTO, global and regional development banks, trade unions, regional bodies and free trade associations) that deal with economic (financial, labor and trade) issues would, therefore, mean turning a blind eye to a potentially fruitful analytical avenue that brings together the debate on the so-called global knowledge economy and the role attributed to LLL therein.

A (5) remark will be made regarding the interest in national donor agencies. They are an exception, inasmuch as they are national organizations (internationally-oriented national organizations). This means that decision-making and funding differ from the others. However, there are many reasons to include them. First, they are considered international organizations

[53] See literature from footnote #3 in Section 1.1.2.

in the literature, sometimes as internationally-oriented national organizations (Union of International Associations 2008), sometimes as transnational actors (Orenstein 2008:42). The main criterion was the total aid volume for education, which has been rising continuously since the 1990s. Following this measure, the main donor countries are those situated in the EU and North America (see OECD CRS 2014). The case for development agencies in the so called BRICS states (Brazil, Russia, India, China, and South Africa) is exploratory.[54]

A more personal reason for such an interest in national agencies has been my own professional experience in 2010 in a government-funded multinational institution, the European Technology and Training Center in Erbil, Iraq. There, German, Swedish and British development agencies, together with USAID, UNESCO and several private business lobby groups, had an important role in shaping the Iraqi-Kurdish policy discourse in education and training.

Roughly following the definitions from the UIA Yearbooks of International Organizations, the organizations selected[55] can be distinguished as:

(1) Multilateral intergovernmental organizations (IGOs)[56]
(2) Multilateral regional intergovernmental organizations (regional IGOs)
(3) Multilateral regional and financial intergovernmental organizations (regional development banks)
(4) Bilateral internationally-oriented national organizations (development agencies)
(5) International non-governmental organizations (INGOs)
   (5.1) International business organizations (business INGOs)
   (5.2) International labor organizations (labor INGOs)
   (5.3) International philanthropic organizations (philanthropic INGOs)

Most of these organizations are more or less known to researchers from the field, others less so. The selection of specific organizations from each of the segments has been made using quantitative indicators (volume of annual budget for philanthropic agencies and national donor agencies) and geographic patterns (from all areas for business and labor associations,

[54] Research on the BRICS in development cooperation is scant, but see Reuters (2014) for an analysis of aid volumes. Spain's AECID has been included since it has a strong focus on Latin America where other organizations are less present.
[55] See Appendix A for a complete list.
[56] In brackets are the terms and abbreviations used in this work.

donor agencies and regional bodies). Of great help in the selection process was the Yearbook of International Organizations from the Union of International Associations (UIA) (see below).

4.1.3 Data collection and sampling II: data on organizations

Originally, it was intended to collect data on sample parameters (organizations' staff, budget etc.) through primary sources, i.e. the organizations themselves. For this purpose, a short questionnaire was constructed including questions about internal structure, staff and budget, as well as the record on educational work (Appendix D). The questionnaire was piloted in six organizations: WB, UNESCO, EU, EBRD, GIZ and Gates Foundation. Despite several attempts at sending the questionnaire to different departments (e.g. public relations, human resources, statistics and archives) and talking to different persons responsible on the phone, the result remained highly unsatisfactory.[57] None of the organizations answered the request by completing the questionnaire; two repeatedly advised me to contact specific persons in specific departments, who after contacting them directly, did not react. Another organization sent a list of very recent publications advising me to look for the requested information myself. This list, however, was incomplete and too recent (2010-2012) to be used as a source.

As a consequence, information had to be obtained from secondary sources, namely the Yearbook of International Organizations (YIO), published by the Union of International Association (UIA), a Brussels-based not-for-profit research association founded in 1907 and now under UN mandate. The YIO has been published since 1950 and contains data on more than 60,000 organizations, which are the primary source for data collection.

The main advantage is that data collection is done in a standardized approach at the UIA and has only changed little since its beginning. The Yearbook also contains much of the information that would have been obtained in the questionnaires, such as data on foundation, aims, staff and budget. This assures some degree of validity and reliability, which is often a major concern when using secondary sources.

The main pitfall, however, lies in the fact that data is patchy, particularly with regard to longitudinal data, inasmuch as the UIA itself depends on the international organizations to

[57] I, nonetheless, want to thank M. Rauhmayer from the WB Paris office, W. Maut from the UNESCO Institute for Lifelong Learning, M. Orenstein, J. Chwieroth, the people from the League of Nations research cluster Heidelberg and J. W. Meyer for advising me on how to construct the data set.

deliver data. This, together with the fact that many organizations from the sample have been founded relatively lately (see Appendix A), leads to a situation of high incompleteness in data for earlier decades.

4.1.4 Data collection and sampling III: selecting documents for quantitative analysis

As with the collection of data on organizations, the retrieval of relevant documents providing reliable information on organizations' work on education and LLL has been made equally difficult because organizations did not respond to the requests.

Document collection was, therefore, done on-line in three ways. (1) on each organization's website using a web developer tool (page source research)[58]; (2) the internal website search engine or – in case this was not fruitful – through (3) *Google* and *Google Scholar, Yahoo* and other minor research engines. Here, it was checked against the organization's name (both abbreviated and full name) linked with the terms from the dictionaries defined above.

Altogether, a search for organizations' documents containing any reference to the specific key words was performed for 20 minutes maximum. This time also includes downloading and the taking of screen shots. The time span of 20 minutes was not always fully utilized. In cases where no document was found after a considerable lapse of time (more than 10 minutes), the search ended earlier. Otherwise, as many documents as possible were downloaded during the 20 minutes. When the number of documents exceeded the number of documents that could be downloaded within 20 minutes, the exact and full number of all documents, as given by the search engine, was used in the final count.

In those cases were no documents were found, I did not contact the organization to ascertain whether such documents existed in archives. It is assumed that, if education and/ or LLL are important matters to an organization, these should have been made available for the public. If not, such interest cannot be of major importance. Consequently, these uninterested organizations will be documented as such and excluded in the subsequent steps of this work.

I decided to use publicly available documents, so that the study could be easily replicated, although there is reason to believe that publicly and easily available documents (especially large reports and easily available project documents) have been made accessible by an

[58] I want to thank H. Lesourd for this advice and K. Engelhardt for helping me organizing the data.

organization for strategic purposes (many documents – most particularly project documents – are only provided on an internal website). However, this argument can be reversed: an organization without any publicly available information about its interest in and commitment to education and LLL is not likely to be of any interest in my study.

Furthermore, it is important to define (1) the type of documents selected and (2) the period from which the documents were selected. The search for documents was only framed by the target key word “education”, a time frame for search (20 minutes; see above) and the fact that the documents did not contain a disclaimer, i.e., the organization takes full responsibility for the content. That means I excluded all those documents that could be subsumed under the category of “research paper”, e.g. discussion papers, working papers and proper policy research papers. This is due to the fact that the views represented in these documents are disclaimed by the organization, even though it might have financed the research in the first place. However, as they reflect the views of the individual researcher, they cannot be regarded as an official document.

In those cases where documents had been published jointly by a consortium of organizations (the ILO and WTO are the only case here), the document became part of the individual organizations' document pool, since each organization is expected to approve of a document's entire content before publication.

No other limiting factors (e.g. additional terms, such as adult education, abbreviations such as ECCE or a specific type of document) have been considered. This open search was done intentionally so as to not confine results by focusing on a specific education sector, project type or document type. With regard to the latter, the final sample of documents may, then, contain official reports, conference summaries and minutes, press releases, project appraisals and evaluations, loan contracts and even interviews with staff, as published in internal communications.

I deliberately did not look for a specific period of time from which to draw the documents. The EFA year, 1990, can, however, be seen as a theoretically-informed starting point for investigation (Chapter 1 and below). The search process ended in the fall of 2013. The period from which documents were selected, then depended on on four factors:

A (1) technical factor, more precisely the time the organization started to make use of IT, sophisticated scanning technology (for older documents) and readable PDF data format documents. Search and screening software are often not able to read machine-typed or poorly scanned documents. The earlier an organization introduced IT and PDF formats, the more likely it is to find these documents through the Adobe search engine and the longer becomes the "education and LLL record" for this organization in my analysis. While IT made its way into data processing in most organizations in the mid- and late 1980s, PDF formatting only started in the early 1990s, as can be seen when looking at the UNESCO or WB reports in this transitional period, since these organizations turn out to be frontrunners in the use of IT. Technological changes coincided with the developments in the field of global education governance, for which the *Education for All* conference in Jomtien, Thailand, in 1990 is a significant indicator, and with an international interest in LLL, which is often linked to the OECD publication, *Lifelong Learning for All* (1996).

A (2) related factor depends on the organization's publication policy. Even if technological conditions are favorable, it is up to the organization to decide what documents are made publicly available. Some smaller organizations take a more restrictive stance than their bigger counterparts (GIZ versus WB for instance) in this regard.

A (3) very obvious factor is the organization itself, i.e. its age. Some organizations in the sample only came into existence a few years ago (such as the Union for the Mediterranean or UNASUR), while others have been working in the field for more than a century (e.g. labor INGOs). In those cases where an organization is to be seen as a successor to a markedly different earlier one (with regard to its internal structure, as with GATS and WTO, for example), the documents of the preceding organization have not been taken into account, but only those of the now current one.

Most importantly (4), documents in the final sample had to reflect the starting point of an organization's interest in education and LLL. Provided that the technological factor, the publication policy and the age of the organizations are all favorable, the organization's interest in and work on the subject are the most determining, and for this work, the most relevant arguments. It is assumed that, if there is no written and published evidence for an organization's interest in education or LLL, that organization either has no interest at all in these issues, wants (for some reason) not to show it or uses markedly different terms than those selected for this analysis. In all three cases, the organization will not form part of the analysis.

A document is included in the final sample if it mentions, at least once, a term from the defined dictionary. I am aware of the fact that such a lexical filter risks excluding those organizations that – without making it explicit – actually work in those sectors that have been defined as the LLL core sectors (ECCE, HE, AE). Two reasons will be given to justify this decision. First, findings for LLL references will considerably reduce the data set, making it more manageable and receptive for qualitative methods. Second, it is the proper objective of this study to assess the degree of diffusion of a concept that has come to be widely, explicitly and, perhaps, purposefully called *lifelong learning*, not *lifelong education* or *permanent education* or any other related term that might have existed earlier.

4.2 Qualitative analysis

4.2.1 Research questions

RQ 1: What is lifelong learning as proposed by international organizations in their documents?

The first research question (RQ) is deliberately wide. It is assumed that lifelong learning describes a model of education or of the educational system. A model of LLL is more than a nominal reference to LLL, as operationalized above in the quantitative analysis. It instead refers to an actors' explicit and systematic reflection on LLL. This reflection does not need to be scientific, but it should be based on a clear understanding of what *lifelong* and *learning* mean.

I define that a model needs to contain at least two conceptual categories (e.g. causes and benefits of LLL) to be considered a model. It might include the categories already provided in the literature on LLL, such as the role of the learner and other actors or the mode of learning (formal, non-formal and informal). It can also include new concepts and categories that might emerge in the course of the analysis. The aim is to code until a maximum of elements of possible conceptual models have been retrieved, that is, until the material is saturated. If a considerable number of documents have been analyzed and no new categories emerge, saturation has been reached (see below for more details).

RQ 2: What is a central category in these models?

Grounded Theory Methodology (GTM) assumes that some categories turn out to be more important in explaining a phenomenon than others (see below). One central category might, eventually, emerge as the umbrella under which all other concepts and categories can be subsumed. Such a central category will be looked out for in the analysis. It will then be scrutinized in greater detail than other categories (through axial and selective coding) and the sections or sequences that contain this category will be subject to more in-depth word-by-word and line-by-line analysis.

RQ 3: Do the models inherent in organizations' publications allow for the construction of different types of lifelong learning?

The categories that emerge while analyzing organizations' statements might be understood as typical characteristics for a lifelong learning model. In the most extreme case, they might – if taken together – represent a prototype, in other cases a less exposed empirical type that is constituted by a specific combination of characteristics, i.e. elements of models (Kluge 1999). Based on the literature on lifelong learning and social policy, it can be assumed that more than one type emerges and that these types are opposed to each other.

An important note needs to be sounded regarding the relationship between variables or categories. Capecchi (1968: 13) suggests different types, such as "the causal type, the input-output type, the functional type", and emphasizes the propinquity of *type* and *model*. He (ibid.) prefers models over types "when the whole of these relationships (between variables, M.Z.) is sufficiently structural." Of course, a pre-determined threshold for a "sufficiently structured" set of variable relations can not be given, but this avenue will be pursued further upon analysis.

RQ 4: Do the inductively generated categories and types differ from those proposed in the literature?

As described in Section 1.1.2, literature on LLL already recognizes some (stylized) assumptions about what elements LLL models can be composed of. It will be examined to see if those assumptions can be confirmed in the context of the organizations and their documents from the sample.

4.2.2 Data collection and sampling IV: selecting documents for qualitative analysis

As touched upon above in the context of organizational sampling, theoretical sampling means to choose cases (here organizations and their documents) based on defined criteria until saturation is reached. In many cases, the number of documents was very small and these have all been included. Where the number of documents was much greater than what could be considered reasonable (the maximum was 18 documents for the EU), the selection criterion that mattered most in this work was to create maximal contrast among organizations and among documents.

Contrasting *organizations* means to alternately look at small vs. large ones, global vs. regional ones, governmental vs. non-governmental, old vs. more recent ones. Contrasting *documents*, in turn, means to jump from older to younger ones, from technical (e.g. project evaluations and loan agreements) to those written for a wide audience (e.g. global monitoring reports on Education for All) and from short notes (e.g. press releases) to large compendia (e.g. world development report). It is assumed that, by mixing the sample, information retrieval becomes richer. By shedding light on the phenomenon from different angles, each subject to internal rules of decision-making (as with loan agreements) and formatting, one might get a grip on different vocabularies and styles of presentation as well as references and above all – if then compared across types of documents – the organizations' essential understanding of the subject.

Appendix C.1 provides a bibliography of all 252 documents used in the analysis. In some cases, the number of documents analyzed is very small, although more documents referring to LLL were found in the quantitative check. This can be explained by what might be called *organization saturation*. When a specific organization's statements was thought to be fully captured by one single document, in the most extreme case, and the reading of additional documents did not yield any new information, this latter document was not included in the list. The bibliography only contains documents that actually enriched the analysis. Additionally, the whole document has usually been taken into account as the context of LLL. However, where documents were very large (as with EFA Global Monitoring or World Development Reports), only chapters and sections where LLL is mentioned have been investigated. Although the number of documents might seem very large compared to usual qualitative studies, it has to be noted that the vast majority of documents barely exceed one or two pages, limiting the whole data set to a more accessible amount.

4.2.3 Documents as data

Documents feature several advantages compared to other forms of data. They are often free, or at least cheap, to obtain. They are easily accessible in times of ubiquitous ICT. They provide access to information from and on areas and milieus, which are otherwise hard to obtain, as in the case of geographically distant regions or international policy-makers and the political surroundings composed of experts, official political staff or project managers.

However, qualitative research has so far been outweighed by quantitative designs in the study of IOs, including from a neoinstitutionalist perspective.[59] This is not without reason.

[59] A similar lack has been bemoaned in the context of organization studies in general (von Rosenstiel 2007).

Neoinstitutionalists have pointed to the fact that documents can serve to generate legitimacy for an environment that expects certain features to be part of organizational structure and action (rationality, efficiency and progress and justice, in our case) and to protect against too close scrutiny (Meyer & Rowan 1977).[60]

At the same time, official policy documents have been analyzed through quantitative content analysis in some important works[61], stressing the fact that such facade behavior might well strengthen the argument for a highly important, externally-provided (world cultural) legitimacy. We might here ask, as do with Meyer, Boli and Thomas (1987:6) "Where do these legitimacy problems come from? […] What is gained and from what source, when individuals or organizations dress their motives and questionable competence in acceptable guise?"

Taking into account the risks associated with the use of primary documents produced by the organization itself in the context of a highly institutionalized world cultural good (education) and for a highly diverse audience, including experts (practical and more academic ones), policy-makers, NGOs and activists, documents are, in this study, nonetheless treated as "institutionalized traces" (Wolff 2007:503; translation M.Z.). Documents are considered as *consciously* or *deliberately* produced in certain formats and for a specific audience (or audiences), containing information about the producer's activities and intentions. I agree here with Gusfield (1976) that documents can be considered windows allowing insight into the inside.

Besides the fact that documents need to be seen as information containers, they are also to be understood as communicative media. It then needs to be a researcher's task to discover and a method's asset to systematically display the messages encapsulated in the documents. The latter point is particularly important. The often-made distinction between primary and secondary data is helpful here. In a strict sense, documents produced by the organizations in the sample are secondary data (as opposed to data obtained directly from people, eyewitnesses or first-hand accounts through interviews, observation or questionnaires) just like government statistics, school text books or any piece of literature. However, the same documents become primary data "if the content is being analyzed for political value" (Harber 1997:115). Loosely

[60] Similar judgment came from other organization researchers before and after these neoinstitutionalist contributions. Goffman (1972) showed that documents only serve to display institutional normalcy and to legitimate the standard operating procedures in mental hospitals. Gusfield (1976) stressed the rhetorical character of documents in general. In a similar vein, Altheide and Johnson (1980) see documents as instruments of bureaucratic propaganda.

[61] For example, Drori (2006) on governance and Hwang (2006) on strategic planning.

borrowing from this perspective, I want to stress that documents in this work are analyzed for *cultural* value. In this sense, the approach in this work is more an ethnographic one, where documents replace the field trip and provide “standardized artifacts” (Wolff 2007:503; translation M.Z.) that allow reconstructing processes of sense-making and cultural change. This is in line with an understanding of GTM that moves closer to ethnographic works (Charmaz 2011).

I would like to emphasize a third characteristic of the documents analyzed. On many occasions, scholarship on globalization has called for the generation of transnational data as one condition for a new “methodological transnationalism” (Vertovec 1999:2; Yeates 2008:2; also Kaghram & Levitt 2008) or “methodological cosmopolitanism” (Beck 1998:115f.).[62] Against the backdrop of the theoretical account in the previous chapter and the conceptualization of the quality of documents as carriers of cultural knowledge, I treat the data retrieved from the documents as *world cultural* data. Thus, the objects of analysis might well be meso-sociological (organization), while the data provided by them are macro-level, world cultural ones.

4.2.4 A note on grounded theory methodology (GTM)

GTM has been chosen since (1) it provides a rich toolbox of analytical techniques that can be adapted to the requirements of the research process; (2) it shares some important theoretical roots with sociological neoinstitutionalism (symbolic interactionism); (3) it has, since its beginnings, frequently been used to analyze documents (e.g. Clarke 1998; Bowker & Star 1999). This section intends to present the most important techniques of GTM and touch on the epistemological fundamentals, inasmuch as it is necessary to understand its propinquity with neoinstitutionalism.

GTM emerged in the late 1960s with the publication of *The Discovery of Grounded Theory. Strategies for Qualitative Research* (Glaser & Strauss 1967), which was meant to be understood as a response to the “overemphasis in current sociology on the verification of theory, and a resultant de-emphasis on the prior step of discovering what concepts and

[62] It is beyond the purpose of this section to discuss the theoretical implications of each of these approaches to transnationalism. But see Adick (2004), for example, for a discussion on transnational organizations in education.

hypotheses are relevant for the area that one wishes to research". Drawing on bibliographic data, GTM has since become "the most prominent among the so-called qualitative approaches to data-analysis" (Titscher et al. 2000:74).

Since GTM was never meant to be a specific method, but more a style of doing research, its subsequent conceptualization, implementation and reception, as proposed by the founders themselves and their followers, took different courses, so that now several "schools" of GTM can be distinguished.[63]

This work uses the GTM approach as proposed by Strauss himself and his most important student Corbin and only partially draws upon Glaser's version. This mix is mainly motivated by two reasons. First, Corbin and Strauss (2008) offer the most elaborated apparatus in terms of theoretical reflection and methodical implementation providing a framework for coding and clear guidance in the proper technique of coding (including handbooks and material on class sessions and coding in teams), as well as some criteria for quality in building GTM (see below). Their coding paradigm is heavily (but not solely) anchored in micro-sociological thinking. Inspired by such scholars as Dewey and Mead, Strauss and Corbin offer a perspective that is interested in the interpretative and phenomenological analysis of (inter)actions of individuals and between them. This is compatible with neoinstitutionalist arguments that put a strong emphasis on understanding actors' behavior.[64]

Additionally, the lens I chose in my work is carved for the observation of macro-sociological phenomena (the world cultural scripts for actors) and their epistemological properties (models or types). As we will see, such an approach finds somewhat more support in Glaser's coding *paradigms* (or *families* as he calls them).

Despite such variety, some technical GTM cornerstones are shared among the majority of GTM scholars. Among these are (1) theoretical sensitivity, (2) theoretical sampling, (3) coding, (4) constant comparisons between codes and (5) the writing of memos to feed back data into the development of theory. These essentials are not only a mere set of tools, they are

[63] Usually, three distinct strands are mentioned. One is closely linked to the works of Strauss and Corbin. A second path opened when Glaser (1992) started to defend his way of doing GTM as the "classic" and "original" way. A third more recent strand is associated with the name of Charmaz. She proposes a more constructivist version of GTM (see for example Charmaz 2011). However, as Kelle (2011) points out, the cleavage between Strauss's and Glaser's versions has been unduly overemphasized by the latter, sometimes for other reasons than methodological ones.

[64] Note, for instance, that such neoinstitutionalist concepts as *actorhood* or *agentic actor* are not only at the heart of the theoretical corpus, they are genuine conceptual innovations in social theory debates introduced by neoinstitutionalists.

methodological elements that underline GTM's main objective to initiate an ongoing iteration between doing and thinking, that is to say, data collection and analysis on the one hand and reflection and theory-building on the other. The following sections will present the major GTM techniques.

Theoretical sensitivity

Theoretical sensitivity basically means to be “sensitive to thinking about data in theoretical terms” (Strauss 1987:22). These theoretical terms can emerge as original ones during analysis, but are usually informed by prior knowledge about the subject. As Kelle (2011) noted, it would be naïve to presume that a purely inductivistic analysis would be possible. The definitions and models of LLL presented in the first chapter provide such sensitivity, but only as initial orientation and not as a definitive analytical matrix as in Mayring's (2003) more deductive content analysis, for example.

Moreover, neoinstitutionalist insights into the characteristics of education (high degree of institutionalization, universalization and strong role of the individual) also aid in demarcating possibly relevant themes in the research process.

Theoretical Sampling

One of the major tenets of GTM is that data collection and data analysis are as simultaneous as possible. Starting analysis with one bundle of data, from which an initial and still fuzzy (or very low-level) concept might arise, the researcher is to go on collecting data “from places, people, and events that will maximize opportunities to develop concepts in terms of their properties and dimensions, uncover variations, and identify relationships between concepts” (Corbin & Strauss 2008:143). In order to uncover variations, cases drawn upon for analysis may be of maximal contrast or from the margins of the heuristic spectrum.

In the context of this work, theoretical sampling has been facilitated by the large amount of data already collected for quantitative analysis. Data from highly diverse types of organizations and documents were already at hand, making it easy to diversify sources.

This process of theoretical sampling is indicated as long as new codes, concepts and categories, i.e., heuristic value or explanatory power, emerge. Once this innovative process peters out, *theoretical saturation* has been achieved and the concepts generated are supposed to fully reflect what the data contain. The process of theoretical sampling in this study is illustrated in detail in Section 4.4.1

Coding

Coding the empirical (text) material is the basis for any qualitative data analysis. The coding process of identifying relevant empirical indicators that stand for at first less and later more and more abstract concepts, is – at least at the beginning of analysis – supposed to be guided by as few theoretical assumptions as possible in order to guarantee an unbiased and strongly inductive research. But even such *open coding* – often done word-by-word and line-by-line in relevant sections of the text – is not done without the help of some parameters supporting the analyst in directing attention to those concepts that might yield more insight into the phenomenon than other, more insignificant, ones. For such rough filtering, GTM scholars propose coding *families* (Glaser 1978) or coding *paradigms* (Strauss 1987; Strauss & Corbin 1990).

Glaser (1978) distinguishes between open coding and theoretical coding. While the former generates *substantive codes, ad hoc codes* or *in-vivo codes* based on the empirical substance (often paraphrased incidents from the empirical material), theoretical coding aims at showing "how the substantive codes may relate to each other as hypotheses to be integrated into a theory" (ibid.:72). For theoretical codes to emerge, the analyst is recommended to make use of coding families that help to focus on specific aspects of the phenomenon. These coding families comprise theoretical concepts from a vast array of social scientific, socio-psychological and philosophical scholarship (see Table 4.2).

Table 4.2: General coding families as proposed by Glaser (1978)

Six C's	Theoretical	Consensus	Dimension	Mainline	Models
Process	Ordering or elaboration	Interactive	Reading	Means-Goal	Type
Degree	Unit	Identity-Self	Cutting Point	Strategy	Cultural

Many of these terms assist in directing analysts' attention towards specific contents in the text, preventing them from drowning in data or getting distracted by hypersensitive unbiased openness. We will see shortly that Glaser's coding families offer additional help in the search for more macro-sociological phenomena (as contained in the cultural family, for instance) than in Strauss's version.

While agreeing with Glaser starting an analysis by open coding, Strauss (1987), and later Corbin and Strauss (2008), proposed to initiate the process by raising questions of what, who, how, when and how long, where, why and by what means, as well as for what reasons. Their *open coding*, during which *in-vivo codes* (similar to Glaser's *substantive codes*) emerge, is followed by *axial coding*. In axial coding, only one coding paradigm is recommended to structure coding. It is Glaser's C-family, consisting of context, causes, (intervening) conditions, consequences and strategies.

Such limitation has been criticized by Glaser (1992) for forcing theory, instead of letting it emerge. Corbin and Strauss's proposition is, however, to be seen as an "empty heuristic frame" (Mey & Mruck 2011:42; translation M.Z.) to be filled with the specific context variables in question.

Grounded theorists' disagreement notwithstanding, these two sides of GTM understanding can be reconciled as long as their shared perception of the need of *theoretical sensitivity* is maintained. I agree with Bryant and Charmaz (2007:18) about a researcher's liberty to explicitly adjust the coding procedure according to the research interest.

I opt for adding the *cultural* code family to the fundamental C-family.[65] Including the cultural family is helpful, as this work is inspired by neoinstitutionalist theory and interested in the global diffusion of world cultural blueprints, as manifested in organizations' written statements. The cultural (ideational or ideological) aspect of LLL models is crucial for this work since it is assumed that world cultural myths of progress and justice are reflected in LLL models. Further, it might hint at cultural conflicts in the institutionalization of LLL.

These families help to code the text material in more accordance to the research questions formulated for this step without unduly screening off attention from other (until now unknown) categories and dimensions.

Besides open coding and the more detailed axial coding explained above, Corbin and Strauss (1990) propose *selective coding*. This technique often appears near the end of data analysis as it seeks to integrate categories into a comprehensive conceptual theory. Selective coding wants to subsume prior categories under a core category which possesses the most explanatory power and integrating potential. This step also includes the search for negative cases that help to extend or vary the theory (instead of refuting it).

Although the terminology might suggest a successive order of coding (beginning with open and ending with selective coding), such a rigid proceeding is not prescribed as imperative, but more as a "rule of thumb". Depending on the process of data analysis, and especially on finding key categories selective coding might initiate at an earlier stage. If, however, the

[65] Unfortunately, Glaser's *type* and *model* families are not useful in the context of this work, as they are too general.

alleged key category turns out to be of less integrating power than assumed earlier, the analyst might return to a more open coding scheme.

Constant Comparisons

While coding can be understood as a technical term describing the procedure of giving an indicator (an incident from the text) a name – first a concrete one, becoming gradually more abstract – the search for indicators from which codes and concepts emerge is done through *constant comparison* or *dimensionalizing*. These two terms co-exist and refer to the fact that indicators (incidents) contain “variations of a property along a range” (Corbin & Strauss 2008:45). Such comparisons can be done by comparing incidents from the data with each other, finding similarities or differences in their properties (or sub-dimensions) or with theoretically conceivable incidents which are not in the data, and could even be absurd to some extent in order to fully reflect what data can possibly stand for. These techniques of comparing or contrasting, pooling and classifying of cases and their dimensions need to be accompanied by *theoretical sampling*, allowing the inclusion of those cases that might yield maximal contrast or similarity.

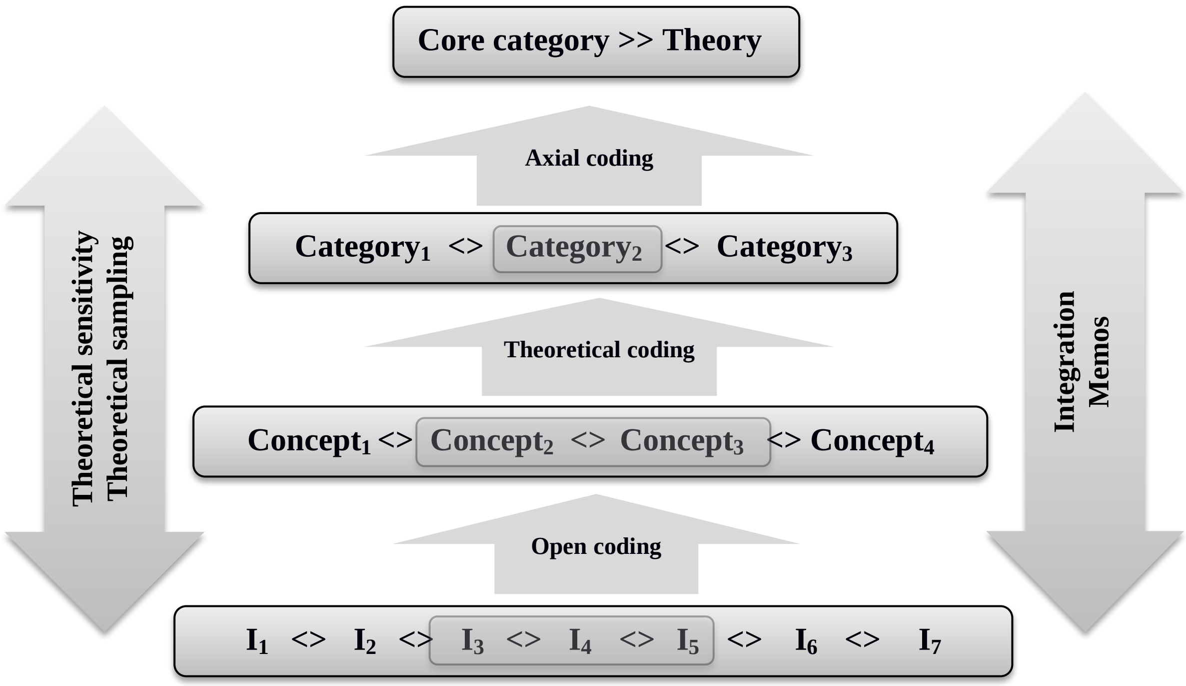
Memos

Sampling, coding and comparing will be accompanied by memos. Memos are nothing more than “written records of analysis” (Corbin & Strauss 2008:117). They less resemble the notes taken by an observer in the field than a reflection of doing analysis. Memos can be more theoretical in nature (when linking indicators to concepts or concepts to categories) or more operational (when deciding on how the sample is to be extended, for instance). Memos are supposed to be written as analysis is proceeding. As soon as potentially relevant thoughts, insights or problems emerge, the coding process is to be interrupted and memos are given priority. Such documentation of reflections, analysis strategies and theory generation is not only technically helpful, it can also be considered as being part of quality assurance, as it renders transparent trains of reasoning (individual or collective, as in team work), sampling strategies and theoretical conclusions.

A typical GTM analysis process goes from text to theory, that is, from concrete to abstract. Texts contain incidents or indicators. In my work, most documents are already written in a very formal and scientific as well as conceptual language, so in-vivo codes are already very abstract and theoretically relevant codes can be directly taken from the documents.

On a more abstract level, concepts (or sub-categories) may condense into categories. These categories are as much a product of conceptual, data-grounded thinking as of a researcher's *theoretical sensitivity*. Theoretical background, professional experience, biography and intuition may all be part of such sensitivity. The mutual enrichment of scientific methodical procedure and creativity has been called the “controlled harnessing of a researcher's subjectivity” (Muckel 2011:340; translation M.Z.). This is what facilitates the leap from data to theory and allows producing innovative perspectives on social phenomena.[66]

Figure 4.1: From text to theory[67] (own account)



The emerging theory is to be seen as one of middle range, valid in the context to which the data refers. For this work, a theory of LLL is to be seen as an *integration* of relationships of several categories into a model that reflects such LLL facets as alleged causal relationships, temporal or process implications and context conditions.

[66] This *abductive* nature of GT methodology has been highlighted by Reichertz (2011).
[67] The concept-indicator model is based on Strauss (1987), whereas the higher-level operations stem from my interpretation of the analysis procedure in GTM literature.

Figure 4.1 above shows how a typical GTM process might look. In my own analysis, I additionally decided to group categories into larger category families to facilitate orientation in the complex data structure.

4.2.5 A note on quality in qualitative research and the use of software

Steinke (2007) distinguishes between three “camps” in the discussion on quality in qualitative research. One group of researchers proposes to adapt the criteria established in quantitative research (objectivity, reliability and validity) to qualitative methods (Mayring 1983). Another position holds that qualitative research has to come up with its own criteria. Among those criteria member check, triangulation and authenticity might be best known. In a third camp, postmodernists disdain any attempt to establish general criteria at all, stating that any rigid reference system would be at odds with the premises of constructivism.

My own position sits somewhat uncomfortably between the first two camps, fearing that a categorical refusal of quality criteria is likely to lead to methodical eclecticism and excessive subjectivity in interpretation. At the same time, the very reason why qualitative research emerged was to systematically reject standardized measurements. In this section, I want to outline criteria specifically created for qualitative methods in general and grounded theory in particular (the second position as above).

Many catalogs have been written by both individual scholars and professional associations defining criteria of “good qualitative research”. A (still thin) consensus seems to take shape that some quality control, or at least “quality management”, is needed (Flick 2004; Lamnek 2010). I share this feeling and agree with Corbin and Strauss (2008:298) in that qualitative research is as much a “scientific” as it is a “creative” and “artistic” challenge. One could add that is also a handicraft, teachable and learnable, and whose techniques should not be hidden behind researchers' magic gloves. Quality management in qualitative research would then have to reflect all these aspects. Needless to say that qualitative research as art cannot be subject to a discussion about quality control.

Regarding the scientific and technical quality of qualitative research, however, it might be useful to point to some common assumptions about quality requirements, as they can be found in both continental and Anglo-Saxon contributions.

A first and essential quality criterion is *appropriateness* of a method. Although very soft in definition, most text books and in-depth monographs refer to it as the dependency of a method choice on the research question (Lamnek 2010:129). The question, ‘Who refers to lifelong learning?’ requires an approach different to that of ‘How do those who refer to it, do so?’

Even within the latter, a focus on deductive theory-testing might need a more standardized approach than an inductive exploration, for instance.

Furthermore, Flick (2004) calls for quality management where the *procedure* of analysis is subjected to clear requirements, i.e., goal-setting and *transparency* in the process of goal-achieving. This includes the training of all researchers involved (if more than one) and cross-checking among researchers' findings (see Corbin & Strauss 2008:303). It is Important here to render transparent how interpretations become coded, categorized and conceptualized through the documentation of memos, notes, diagrams and synopses. Most of these claims seek to enhance *intersubjectivity* and *credibility*.[68]

As a third proposition, Lamnek (2010:19), among others, directs attention to *openness*. While standardized tools of data collection and analysis risk reducing insights by filtering information even before retrieval, it would be one of the main tenets of qualitative research to do justice to the *complexity* of the phenomenon studied through inductive data coding. Openness, therefore, also means tolerance against ambiguities and contradictions in the data, as well as unexpected turns during analysis that might direct the focus of interpretation away from originally assumed avenues.

In line with the tenets of the sociology of knowledge and the tradition of hermeneutics,[69] *reflexivity* needs to be mentioned as a fourth criterion. The relationship between researcher and object to be researched is communicative and reflexive, in that every meaning is constructed by and through the context with which it is embedded. Both the symbolic and social context matter in the analysis and the subsequent theory-building process. The mutual enrichment of symbolic interactionism as a theoretical school and grounded theory as an analytical tool kit reflect the roots of this claim for reflexivity. It is, therefore, imperative to (critically) observe one's own knowledge, approach and interpretation of results since – as Marshall and Rossman (2006:72) have pertinently pointed out – “the researcher is the instrument”.

[68] *Credibility* is a term already used by Glaser and Strauss (1967:225) to avoid any discussion on validity and reliability. It can be understood as how believable findings are.
[69] Earlier discussions on reflexivity in research have been led by Husserl, Schütze, Berger and Luckmann. See Lamnek 2010:26ff. for a review.

Following Corbin's and Strauss's (2008) call for teamwork, I presented some of my early material (two uncoded documents and, later, two key passages of coded documents) in my class on qualitative methods during winter term 2012/13. Participants (BA and MA students from psychology and social and education sciences) had been made familiar with key ideas from GTM, but were largely unfamiliar with the topic. The objective was to cross-check my own observations and stimulate views from "naive" observers.

In a second step, identical sections of documents that I had already coded were given to two research fellows to see if reading and re-coding corresponded with each other, regardless of the researcher. A "softened" reliability measure has been used to test my personal results with those from a fellow coder (90% coding agreement).

In order to render the full analytical process (from selection of documents to interpretation of findings) more transparent, I will provide as much documentation as possible. Appendices C.1-C.6 provide relevant documents, indicators and codings. Additional notes on memos and intercoder agreement supplement this.

Such quality assurance as part of a transparent audit trail can be further facilitated by the use of software. I agree with Corbin & Strauss (2008:310) in that computers "do not do the thinking but enhance creativity by analyzing data different ways". They also help to organize data (documents bundled in sets), analysis (codes bundled in families), reflections (memos connected to codes and documents) and processing and presentation (through visualization of relations between codes and documents).

First attempts in qualitative data analysis (QDA) have been made, using paper and pencil. After some familiarity with the "conceptual thinking" that is behind coding, I used several different QDA software. Among these were the open source programs RQDA and Textpack and two commercial products (Atlas.ti and Maxqda). Unlike the open source programs, commercial software has a more user-friendly interface, allowing for the coding of PDF documents and, more importantly, the visualization of code relations. I used RQDA for basic operations for as long as possible, deciding to switch to Atlas.ti and Maxqda for more sophisticated operations at a later stage.

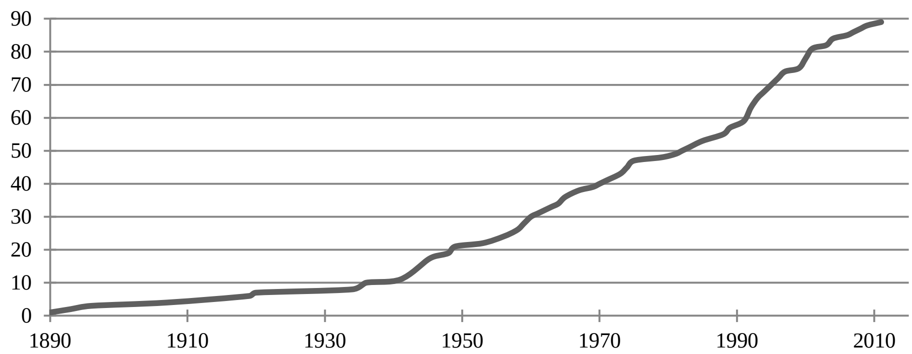
5. Results

5.1 Results of statistical analysis

5.1.1 Heterogeneity in an expansive field

Overall expansion of the field[70] is documented by organizations' foundations, which increase significantly during the period (*H.2*). While many Europe-based worker representations, such as the International Metalworkers Federation (IMWF, 1893), date from the late 19th century, most universal membership IGOs (the UN system, for instance) were founded around or immediately after 1945. In the post-WWII period, foundations considerably increased with another slight boost after 1990 (Figure 5.1). Regional bodies saw an initital impetus in the 1960s and 1970s and a second in the 1990s. The youngest organizations in the sample are the Union for the Mediterranean (UfM), founded in 2008, and the GIZ (2011 as the year of re-foundation)

Figure 5.1: Cumulative count of international organizations[71] (by year of foundation; N=89)



The foundation pattern is in line with observations from neoinstitutionalist research on the expansion of IOs and reflects the general exponential long-term trend as documented by the UIA, starting with less than 1,000 organizations in 1900 and now numbering more than 35,000 IOs (both governmental and non-governmental) (Boli & Thomas 1999; UIA 2008:36)

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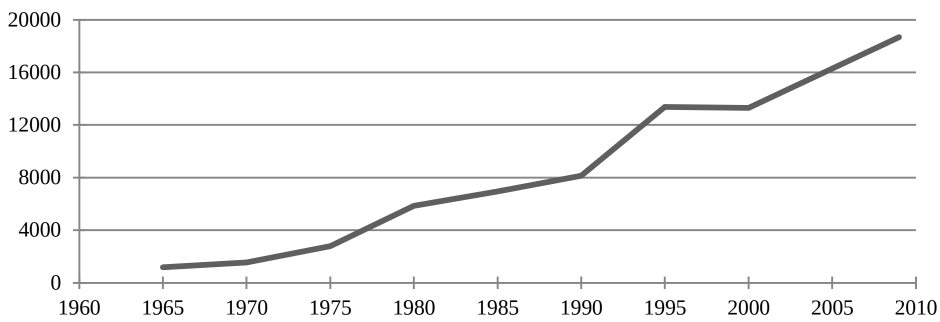
[70] Sample size N=88. From the original sample, the Asian Trade Promotion Forum (ATPF), the Asociación Industrial Latino- Americana (AILA), the South Asian Regional Trade Union Council (SARTU), the Maghreb Union (AMU) and ChinaAid have been excluded since there was either no website available or there was no information in the UIA Yearbooks of International Organizations, from which all other data was collected. All data is available from the author. All statistical analyses have been done with XLSTAT. For all tests in this section assumptions have been checked before computation.

[71] For foundations, the WB is divided into IBRD and IDA, for other variables the latter two have been summed up to one WB variable.

In order to measure whether there are positive trends for key parameters of the field, I calculated the averages for budget, staff, members (both countries and other members, i.e. workers for trade unions) and publication types.[72] Due to the lack of continuous time series information, the averages displayed below reflect developments for smaller sub-samples (Table B.1 in Appendix B.2) making it largely impossible to thoroughly investigate trends for specific groups of organizations (by type or area for instance).[73] The aim was to balance maximal length for the time series with a considerable number of organizations.

For all indicators, a clear positive trend can be reported for a period that spans up to 55 years (for publications), pointing to high multicollinearity.[74]

Figure 5.2: Average increase in budget (N=7; in billion US$)

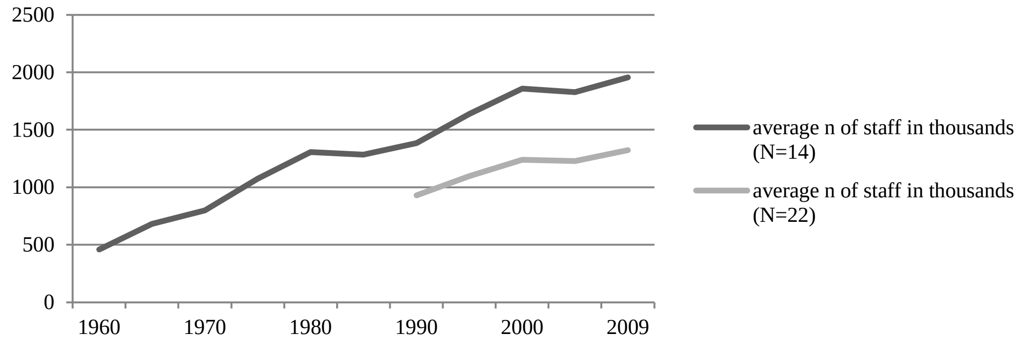


Budgets significantly increased in the time after 1965, with particular changes in the 1990s.

For fourteen organizations, the increase in paid staff occurred by factor four over a period of fifty years.

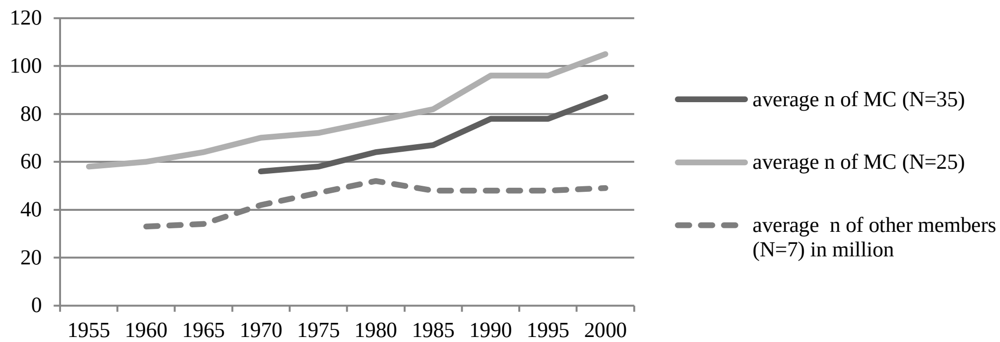
[72] Since it was impossible to obtain reliable data on publications over time, different *types* of publications (as indicated by their titles) have been used as an alternative indicator.
[73] See UIA (2008:258) for a description of the problem with particular regard to staff. Particularly difficult was obtaining comparable data on budgets since early data is often in foreign currencies (which sometimes no longer exist). These have been converted into US$ from 1990 on, using the Quanda converter (http://quanda.com). Another problem occurs when assessing budgets as financial organizations often use artificial units or drawing rights. Special drawing rights (for IMF, for instance) have been converted into US$ from 1990 on through Sauder (http://fx.sauder. ubc.ca/SDR.html).
[74] Due to methodological problems (missing values, no normal distribution, unequal variances), regression analysis to check for multicollinearity has not been possible. Theoretically, one might assume that more members lead to higher budgets, which translates into more personnel to administer these new members. The fact that new states emerge which join already existing organizations or found new ones might, in turn, point to world cultural diffusion processes (Meyer et al. 1997).

Figure 5.3: Average increase in staff



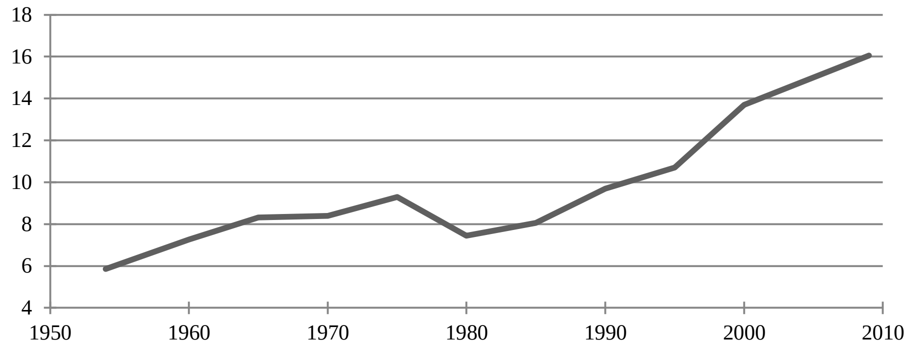
The field integrated more members over the time observed. Countries have increasingly joined the field, while numbers for the seven trade unions have been stagnating since the 1980s.

Figure 5.4: Average increase in members



The trend for publication types is particularly poignant. While twenty-one organizations published only six different types of publications in the mid-1950s, this number had tripled by 2010. This reflects the overall positive trend reported by the UIA (2002; 2006; 2008) that the total number of publications produced by all international organizations has risen from 20,500 to 34,500 in ten years (1996-2006).

Figure 5.5: Average increase in publication types (N=20)



In order to see whether these trends are significant changes over time, nonparametric Mann-Kendall and Sen tests[75] have been performed.

Significant positive trends with strong correlation and change values can be reported for all variables except for *other members* and the smaller *member country* and *staff* sub-samples, where the tests might miss the trend due to the small number of observations (Appendix B.2).

As already mentioned, data is not symmetrically distributed. This is due to the fact that a considerable number of organizations show low values for all variables and another considerable number of organizations high values. Half of the field's 41,000 (full-time, paid) employees work in four organizations (UNICEF; WB; WHO; IMF) (Figure 4.7). Particularly salient is asymmetry in g distribution. Here, two organizations dispose of 97% of the sample's financial means. More equally distributed is the field's publication diversity (548 types in total), where half of it comes from eleven organizations (Figure 5.8).

[75] See Appendix B.2 for further description.

Figure 5.6: Staff distribution (N=53; 2009

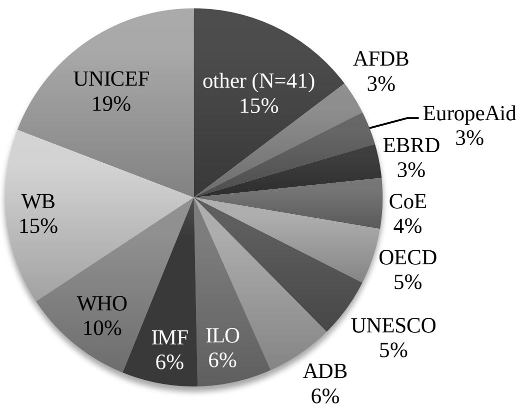


Figure 5.7: Budget distribution (N=24; 2009)

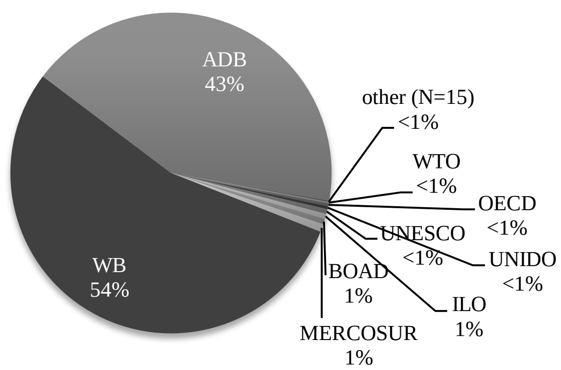
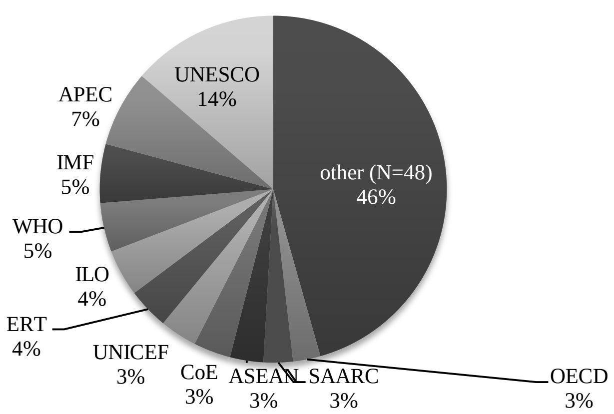


Figure 5.8: Publication type distribution (N=59; 2009)



Although the asymmetric distribution of the dependent variables might be considered methodologically unwelcome, it points to the theoretically-interesting finding that the sample is divided into one large group with high values for parameters and another one with low values (see discussion).

5.2.2 Diffusion of education and lifelong learning in a dynamic and bounded field

It was assumed that the organizational field is loosely bound by shared goals of progress and development (*H.1*).[76] Indeed, 66% (N=47) refer to these goals in their current statement of aims. Interestingly, the reverse picture exists when looking at how many organizations explicitly refer to education or learning. Here, 20% (N=14) of the sample mention one of these two goals and, of these, two have only a single reference to education without a reference to development (i.e. CCL; IUF) and only 12 make a reference to both education and development.

Table 5.1: Explicit references to development and education in organizations' statements of aims

		aim reference to development[1]		Total
		not mentioned	mentioned	
aim reference to education	not mentioned	22	35	57
	mentioned	2	12	14
Total		24	47	71

[1] Search words were development; progress; growth.

If we compare those organizations that only refer to development with those that mention development and education in their statements, we have a significant difference ($p <. 001$) between these two groups (Table B.5 in Appendix B.2) There is, however, no significant difference between specific groups of organizations (old vs. new or specific types) that explains more frequent references to education. We may cautiously interpret this situation as a general concern for development across the heterogeneous organizational field in the sample that is not accompanied by a similar concern for education.

While education was rarely on the agenda at the beginning of organizations' work, we can assume the contrary for the current period (1990-2013). The quantitative analysis shows that the vast majority of organizations from the sample has some interest in or attaches some

[76] Only one organization (ETUC) refers to growth alone.

importance to education.[77] All organizations, independent of type, mission, age or any other variable, mention education at least once in their available documents. *H.3.1* can be confirmed.

The numbers are less sweeping when it comes to LLL (*H.3.2*), but 63 out of 88 explicitly refer to the idea in their documents (71.5%). The asymmetries that have been found for e field parameters above are similarly salient in organizations' publication records, with a small group of organizations accounting for most of the published material.

The "big four" that we were introduced to in the literature review account for 76% (or 711,000 documents in total) of educational material and 74% (or 20,500 documents in total) of LLL material (933,669 total N of documents referring to education and 27,720 total N of documents referring to LLL) (see Figures 5.9 and 5.10).

The composition of the groups changes depending on the variable. Despite the hierarchical composition that largely reflects the structure of the field in terms of the budget, personnel and types of publications above, we can see that a large number of organizations, which have so far remained underresearched, show considerable interest in educational matters (see Appendix B.2). Among these, we find a whole array of organization types from the sample. Both business (BusinessEurope, BIAC and UEAPME) and labor organizations (UNI and EI) are mentioned here. Furthermore, development actors have largely discovered LLL. Bilateral agencies are strong actors, judging by the numbers (EuropeAid, USAID), as are development banks (AFDB and IADB). Some regional bodies are also part of the high-interest group. OAS, APEC and CARICOM not only represent three different areas, two of them (APEC and CARICOM) have been primarily seen as economic bodies. They still might be so, but they have certainly entered (at least implicitly) the discourse on LLL.

[77] Since no qualitative analysis has been done for these *education* documents, I propose two interpretations. One is more cautious (shows interest in education) another bolder (attaches importance to education). Similar interpretations hold for the number of lifelong learning documents. I do not assume that organizations in substantial numbers refer to education in negative terms. This assumption is indirectly backed by the subsequent qualitative analysis, where such positions could not be found.

Figure 5.9: Distribution of publications with reference to education (N=88)

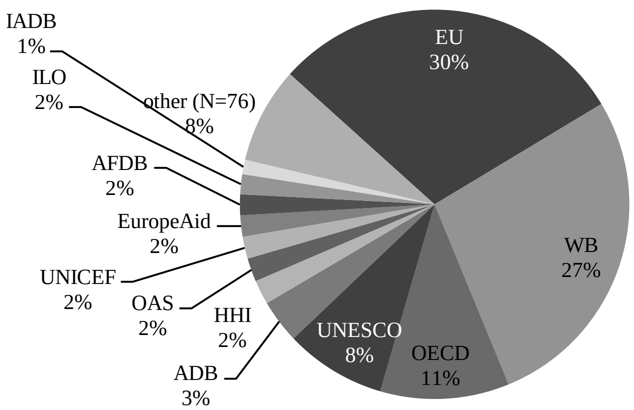
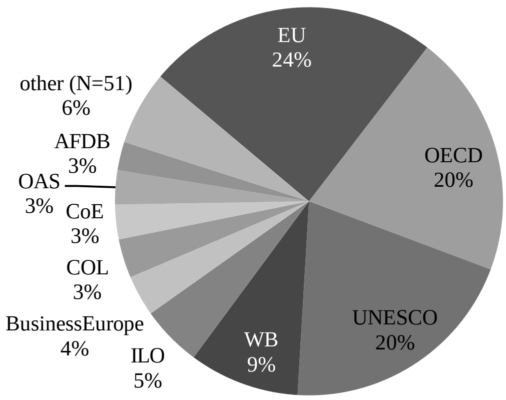


Figure 5.10: Distribution of publications with reference to LLL (N=63)



In some cases, the number of documents referring to education is very close to (CoE, ILO, CAN) or even exceeds (UEAPME) that of the documents on education.[78]

However, these numbers are to be treated with caution for the methodological reasons outlined above and when it comes to deducing implications for the interpretation of the field composition. As we will see, some organizations (the philanthropic INGOs and PPD) use LLL only in an internal recruitment context, others display high numbers of LLL documents in the search process, but have little actually published material available (CoE). Most

[78] The anomaly in the case of the CoE might also be explained by the specifities of the internal search engine.

importantly, some publish very few documents that refer to the idea of LLL, but these few documents are very rich in information (see Section 5.2.1 below).

In order to capture the dynamic of the diffusion process over the period 1990-2013, the first published document containing a reference to LLL has been used as an approximate variable for the interest in LLL. While the starting year for the observation period had *a priori* been decided based on more theoretical suggestions, the first document from the sample (UNESCO) was indeed from 1990 where lifelong *learning* and lifelong *education* are still used in parallel (a situation that can only be found in EU documents from the years 1993 and 1995).

Figure 5.11 shows that diffusion is slow until the millennium, when it achieves an initial momentum. Until 1999 only five organizations (UNESCO, EU, UNICEF, OECD, WHO; see Table B.8 in Appendix B.2 for a detailed time line) had mentioned LLL in their documents. A second, and more important tipping point, occurs around years 2006-2008, when more than half of the sample has referred to the idea.

In order to specify the kind of increase and its significance, I processed the time series in two different regression models[79], one linear and another logarithmic (see parameters in Appendix B.2). Both models have almost identical estimates and yield significant results (p=.049 for the linear model and p=.048 for the logarithmic model) with a small, but acceptable R^2 = .165 (R^2=.166 for the logarithmic model). We can say that there is a significant increase in the number of organizations referring to LLL over the period from 1990 to 2013. At least in this simple model, time as an independent variable matters.

[79] Simple linear regression has been used since the trend in the time series is of interest, not the likelihood and predictability for organizations' LLL reference (as in logistic regression) or the rate and "risk" of organizations' reference (as in event history models). Only one outlier might be considered problematic (the value for 2006), but it is still below 3 degrees (see Figure B.1 in Appendix B.2).

Figure 5.11: The diffusion of LLL over a period of 23 years

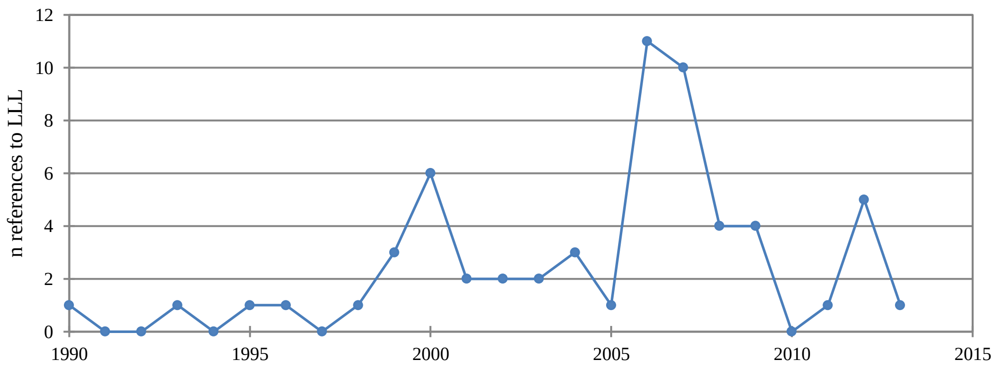
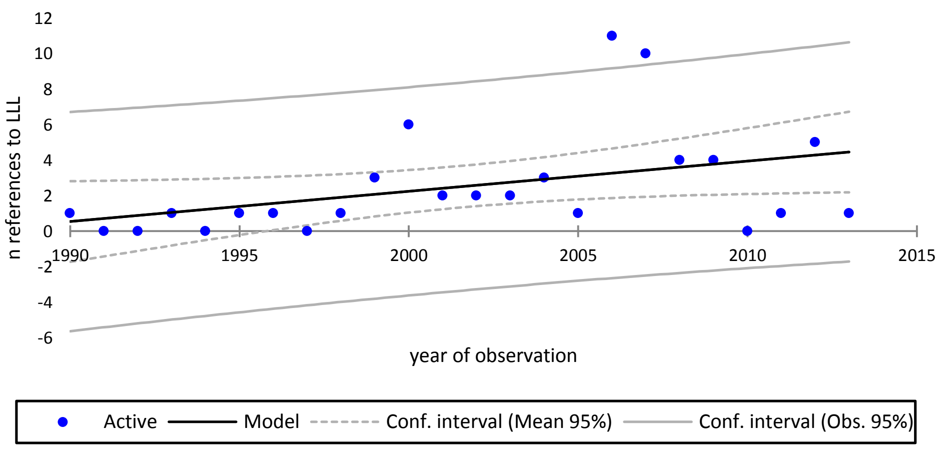


Figure 5.12: Regression analysis of references to LLL by of observation (R^2=0.165)



Further specifying what other factors might influence organizations' reference to LLL and time until reference (*H.3.3*), I tested[80] for significant differences between three contextual variables/ covariates: the type of organization, the geographical area the organization represents and the age of organizations.[81]

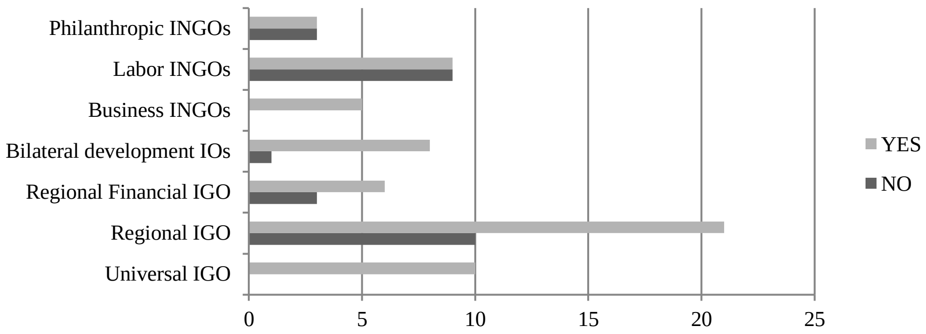
Looking at patterns of frequency in mentioning the idea, it is clear that universal membership IGOs and business INGOs are more unanimously interested (but not very significantly:

[80] This would be a typical ANOVA design. However, ANOVA is only robust to unequal group variances (which is the case in my sample) when the groups are of equal or near equal size (which is not the case in my sample). I chose nonparametric tests that do not require this assumption, but which do not allow checking on interaction effects of explanatory variables.

[81] See Appendix A for organizations by types, age and area. A new organization is defined as one with foundation after 1990, i.e. during period of observation.

p=.03). Significant differences cannot be ascertained if we compare older organizations to those founded after 1990 or those located in specific geographical areas (see Table B.5 in Appendix B.2 for test results).

Figure 5.13: Reference frequency by type of organization



If we look further to see whether there is any pattern in the diffusion over time, as in the time it takes the organization to mention lifelong learning for the first time (its "waiting time" or "life time"), the interesting result here is that newly founded organizations are significantly quicker in adopting LLL. A Mann-Whitney test indicates that it takes them 6.5 years less (*Mdn* = 8.50 versus 15 years) to introduce the concept compared to older already established organizations (*p*=.011). However, this difference disappears if the type of organization or the geographical area is used as independent variables. Newly founded organizations are, thus, not more frequently interested in LLL, but, if they are interested, it takes them less time to pick up the concept. We will return to this finding in the discussion.

5.2 Insights from qualitative analysis

5.2.1 From codes to categories: “grounding” lifelong learning

To give an idea of the initial coding procedure, Table 4.4 presents the order in which the first ten documents were analyzed. Starting with the CoE as the historical organization that initiated the discussion on LLL in the early 1960s, I then turned to the development discourse, both in a bilateral (USAID) and multilateral (UNESCO) context. Although remaining global in scope the fourth organization in the analysis is limited to a certain type of audience, namely metalworkers (IMWF). Contrasting workers' representations with those from organized business (BIAC) has been another example of GTM's flip-flopping technique. Staying in the financial realm I jumped back to multilateral governmental development actors (IDB) and ended this first analytic route with a philanthropic INGO (Gates Foundation).

These first analytic steps were accompanied by both drawbacks and much encouragement. Regarding the former, the CoE's internal search engine seems to have been programmed as equaling *LLL* with *education* (see the anomaly in Tables B.6 and B.7 in Appendix B.2). Indeed, documents explicitly containing *lifelong learning* have been scarce. This should caution us in judging the quantitative data.

Secondly, LLL in the Gates Foundation has only been used as an internal strategy of further education. This is also true for other philanthropic INGOs and the IGO PPD. All the organizations' documents on LLL are, therefore, excluded from further analysis. The final sample then contains 252 documents from 59 organizations (see Appendix C.1).

Two things further made the GTM process somewhat strenuous at this early phase. First, due to the fact that the material is marked by an already high degree of abstraction, further abstraction was only done where necessary and possible. The challenge was to not replicate the theory already inherent in the material by only laying bare the relations among arguments, which have not been spelled out as such. Such pooling and clustering of arguments would have more resembled the conventional content analysis (as in Mayring 2003). Only relatively late in the process of analysis (after two thirds of the analysis period) did real “grounding” occur. Late categories are often those that show small quantitative representation in the sample and a higher degree of abstraction and complexity, notably in the *epistemic family*, which might be explained through increasing familiarity with the material and the GTM coding techniques.

Second, prior knowledge pushed analysis into specific directions for too long. The theoretical considerations and models from Sections 1.1.1, 1.1.2 and 2.1.2 fueled my attempt to create distinct and opposed types of LLL. The dimensions, as outlined in Table 1.1, while

Table 5.2: First phase of analysis

CoE	CoE (2007) *CDED Summary Progress Report.* Strasbourg.
	CoE (2008) *Bologna Process Template for National Reports: 2007-2009.*
USAID	USAID (2003) *FY 2003 Performance and Accountability Report.* Washington DC.
	USAID (2005) *Education Strategy. Improving Lives Through Learning*. Washington DC.
	USAID (2006) *Year 1. Annual Report.* Washington DC.
	USAID (2007) *Final Evaluation. Managing Basic Education (MBE) Project.* Washington DC.
	USAID (2011a) *Government of Greece and USAID form a Partnership for Development Assistance in Afghanistan.* Washington DC.
	USAID (2011b) *Hope Arrives on Two Wheels in Hirat.* Hirat.
UNESCO	UNESCO (1990) *Final report, World Conference on Education for All: Meeting Basic Learning Needs.* Jomtien.
	UNESCO (1994) *Lifelong learning for the 21st century.* Rome.
	UNESCO (1996) *Reort, Learning the Treasure Within.* Paris.
	UNESCO (2000) *The Dakar Framework for Action.* Darkar.
	UNESCO (2001) *Technical and Vocational Education an Training for the Twenty first Century.* Paris.
	UNESCO (2004) *Higher Education in a Globalized Society. UNESCO Education Position Paper.* Paris.
	UNESCO (2007a) *Educational Panorama 2007: achievements and challenges.* Santiago.
	UNESCO (2007b) *Report, Strong foundations. Early childhood care and education.* Paris.
	UNESCO (2008) *Jakarta Strategy Paper on South-South Policy Forum, on Lifelong Learning as the key to Sustainable Development.* Jakarta.
	UNESCO (2009) F*inal report, confintea VI, sixth international conference on adult education.* Hamburg.
	UNESCO (2010a) *Report, Reaching the marginalized.* Paris.
	UNESCO (2010b) *Good Practices in TVET Reform.* Paris.
	UNESCO (2011a) *UNESCO and "Everyone has the right to education".* Paris.
	UNESCO (2011b) *Report, Overcoming inequality: why governance matters.* Paris.
	UNESCO (2012) *Report, Youth and skills: Putting education to work*. Paris.
IMWF	IMF (2002) *Stress and Burnout. A growing Problem for Non-Manual Workers.* Geneva.
	IMF (2004a) *Getting a grip on white-collar workers.* Geneva.
	IMF (2004b) *Organising Non-Manual Workers – Follow-up.* Geneva.
	IMF (2005a) I*MF Action Programme 2005-2009.* Vienna.
	IMF (2005b) *Reports of Affiliates.* Vienna.
	IMF (2006) *Organising the unorganised: Career development and lifelong learning. A key issue for non-manual workers.* Geneva.
	IMF (2009a) *Reports of Affiliates.* Gothenburg.
	IMF (2009b) *Report of the Secretariat.* Gothenburg.
BIAC	BIAC (2001a) *Joint Meeting of Management and Trade Union Experts on "Firms, Workers and the Changing Workplace: Considerations for the Old and the New Economy".* Paris.
	BIAC (2001b) *Innovation and Global Sustainable Growth.* Paris.
	BIAC (2003) *"Age Management: Which Responsibilities for the Partners Involved?*. Paris.
	BIAC (2005a) *OECD Social Policy Ministerial "Extending Opportunities: How Active Social Policy Can Benefit Us All".*
	BIAC (2005b) I*nternationalisation of Research and Development.* Paris.
	BIAC (2007) *OECD Expansion and the Global Importance of ts Work on Investemnt, ClimateChange, and Innovation.* Paris.
	BIAC (2011) *OECD Meeting of Social Policy Ministers. Building a Fairer Future: The Role for Social Policy.* Paris.
IDB	IDB (unknown) *Projects & Operations Evaluation: On-going Activities.* Jeddah.
	IBD (2006a) *A Vision for Human Digity. Vision 1440H.* Dubai.
	IBD (2006b) *Minutes of the Third IDB 1440H Vision Commission Meeting.* Kuala Lumpur.
Gates Foundation	Gates (2002) *The CAD*LAC Center Receives $250,000 Grant from the Bill & Melinda Gates Foundation to Fund Community Learning Center in Wapato*. Press Release.
	Gates (2000) *Gay City Health Project*. Grant appraisal.

preventing from drowning in data, seduced me into prematurely attributing text segments to categories, often blocking openness for new insights. The methodological debate on *emerging* vs. *forcing* of grounded theories, on which I touched in 4.2.4, has indeed been felt during coding. I would, therefore, disagree with Kelle (2011) who states that the difference between these two strategies is of minor relevance.

Despite such hurdles, most categories that eventually made their way into the complete code/category system had already been touched upon at this early stage. Indeed, discoveries of new and substantial categories petered out over time. At a later stage, analysis was marked by a high rate of repetition of arguments, leading to a process of sorting organizations along the categorical lines drawn in an earlier phase. The concept system was refined during analysis to avoid overlaps or misunderstandings. Intercoder-reliability was checked at the end of this first phase for a limited set of codes and documents with a satisfying result (95%; see Appendix C.6).

What emerged after analyzing roughly 40 documents was a "data map" that contains 25 categories and 155 concepts or sub-categories, organized in five category families (see Tables in Appendices C.2 and C.3). For all organizations in the sample, a minimal model of at least two related concepts can be confirmed (*RQ.1*). These stem mostly from *Family I* (Table 5.3).

Table 5.3: Category families

Family I: causes, conditions, consequences
Family II: populations
Family III: educational implications
Family IV: governance
Family V: epistemic family – contexts, meanings, inconsistencies

Despite the fact that this data map is much more detailed and complex, due to its empirical propinquity, some of these families and categories can already be found in the literature (except the welfare context) (*RQ.4*). At the same time, they were misleading as they suggested the existence of coherent and conflicting types of LLL models, often using one central category (the purpose of LLL) as the main pivot for these types (*RQ.3*). For several reasons, such type-building has not proven to be feasible or analytically fruitful (see memo in Appendix C.4). In order to construct a type, one first needs a sufficiently integrating category that represents this type (by rendering it internally coherent and externally distinct from other types). However, organizations are either mute on or unified in certain important (and thorny) issues. They are unified in the belief that LLL has manifold purposes or in stating that a private-public mix is the best choice for the provision, at the same time they are mostly silent on, for example, the funding of LLL sectors.

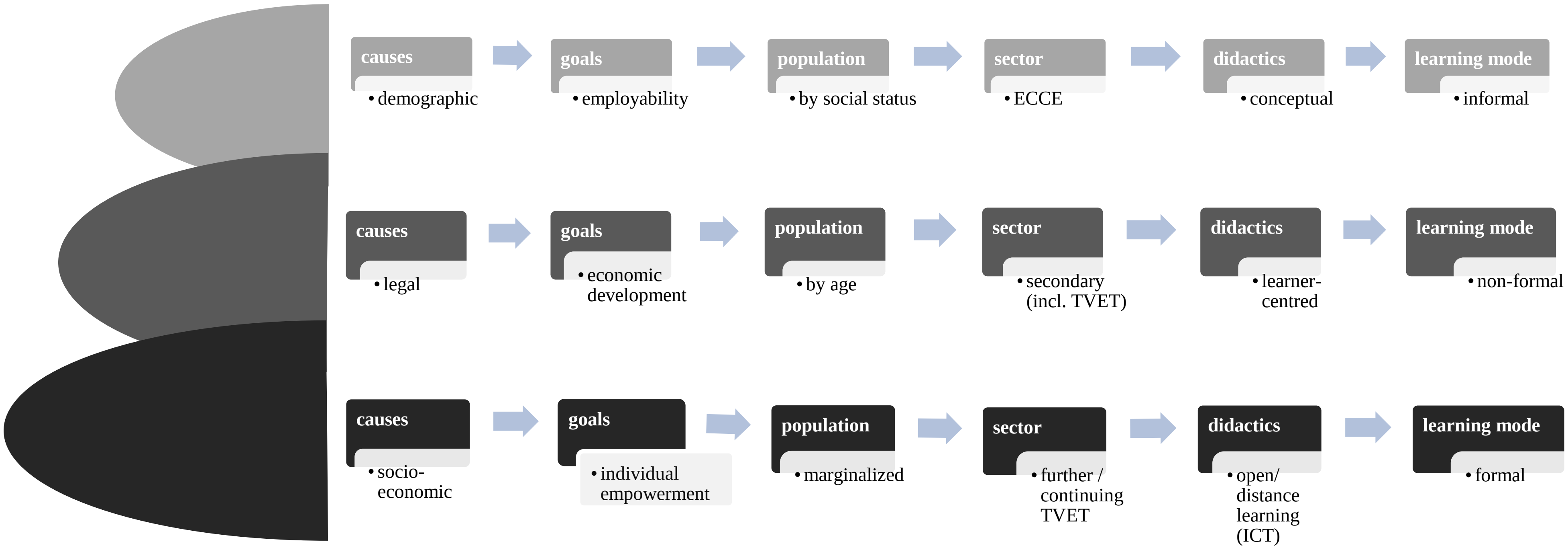
Furthermore, it has not been possible to distinguish LLL as a *development concept* for less industrialized countries and a *reform concept* for more industrialized ones. One of the remarkable features of LLL is its global uniformity in most of the core subjects.

Moreover, at some points of the analysis, the impression took shape that there might be a LLL type defined by its area or cultural roots. In this sense, there might have been an Asian, Islamic or European LLL type. However, upon further investigation, much "uniqueness" in these types turned out to be part of a cross-organizational, universal portfolio of shared causes, goals and educational implications.

In order to illustrate the diversity in the most frequently mentioned (that is, by the greatest number of organizations) concepts, Figure 5.14 below shows the three most represented categories, along with their codes. As we can see, judged by the number of organizations, LLL can be called a means of individual empowerment as a response to socioeconomic challenges. This empowerment is, above all, targeted to the most marginalized groups by vocationally training them via ICT (the first row of Figure 4.15). However, moving upwards we find additional causes (human rights and demographics), additional goals and groups (the elderly, the youngest and the poor) and different sectors (secondary and ECCE). Other categories are missing, mostly from the *governance family*, where issues of funding and provision are discussed.

Based on the analytic implications described above, I decided to focus more on the commonalities instead of the differences across the sample. We will see in the next section that such a strategy allowed the building of a grounded theory of LLL upon one central or key category (*RQ.2*) to which all organizations refer and to which all other categories can be related.

Figure 5.14: Most frequently mentioned categories and concepts



5.2.2 The lifelong learner

It has been argued that LLL might imply many fundamental changes for national education and training systems (Chapter 1). By close examination, however, such systemic prescriptions are the exception rather than the rule in the documents analyzed. Recommendations or policy proposals for reforming systems are rare and often repeat what had been already articulated long before LLL was put on the agenda (e. g. de-centralization) or what is mainly discussed separately from LLL (e.g. quality control).

The degree of abstraction that marks the model of a possible LLL *system* contrasts with the detailed picture of the lifelong learning *individual* who is at the core of virtually all contributions analyzed. As explicated in the theory section, diffusion works best when specific adopting populations are well-defined in the theorized models (Meyer & Strang 1993). Paradoxically, organizations from the sample direct their LLL recommendations to such a myriad of learner populations that it appears less plausible to differentiate between different types of learners and related LLL concepts. This finding deserves further mention.

The most obvious and remarkable criterion which organizations use to select populations is *educational*. LLL is for both those with little education and those at the upper end of the educational ladder. Mostly (but not exclusively) in developing regions, LLL is targeted towards the illiterate, out-of-school children, drop-outs or early school leavers (OAS 2001:36; PIF 2007:12; SAARC 2010c:37; AFDB 2007b:16; AFD 2006:7; JICA 2007:19). Mostly at home in richer countries (but again not exclusively) are calls for LLL for “secondary students, higher education students, PhD students, non-traditional students and the non-skilled (EU 2012:4; CoEDB 2006:8; EFPS 2011:18; BIAC 2001:4; UEAPME 2008:3). If all these educational criteria are taken together, we might argue that LLL is for both “the knowledge-haves and knowledge have-nots” (OECD 2004:2) and for both the “educational poor and educational rich” (UNESCO 2009:43 f.).

Equally broadly defined are those groups that can be pooled together based on more *socioeconomic* criteria. Here, four large segments stand out: the unemployed, the underemployed, the informally employed (often self-employed or rural workers) and the formally employed. While the three first groups are expected to increase their employability through LLL, it should not surprise that the formally employed workers are also mentioned. This latter group is highly diverse: traditional sector workers, rural workers, manual and non-manual workers and employees in small and medium-size enterprises. If we add the occupations that have been mentioned in detail, teachers are particularly worth including

(Con. IV.2). They all have "to update skills" (EU 2000:11) in order to "keep pace with the complexity and dynamics of economic and social development" (GIZ 2011a:1).

Neither is there a clear pattern when it comes to defining *age* groups addressed in LLL documents. References range from the unborn (UNESCO 2010a:43; WB 2013:175) to older workers (most labor and business INGOs) and the retired (EU 2001:13; WB 2003b:58). LLL is thought to be apt to address both "youth bulges" (WB 2013:207) and the "aging of our populations" (CoEDB 2006:8)

If there is any pattern at all in these target groups, it might be the status of being *marginalized* in some way. This marginalization can be based on gender or location, ethnic and religious background, migration status or handicap, conflict-ridden or disaster areas and diseases (Con. II.1). These "most in need" (*los mas necesitados*; translation M.Z., CAN 2004: no page), "most vulnerable" (e.g. ECOSOC 2011:24), "under-represented" (e.g. DFID 2011c:11), "unreached" (e.g. SAARC 2010c:10) and "underserved" (e.g. IMF 2012b:185) are, by implication, those with least access to LLL and, therefore, given all the more attention.

What takes shape here is a paradoxical pattern. The more organizations specify their target groups, the more it becomes evident that nobody is missing. Organizations (perhaps without wanting it) realize what the OECD (1996), in its prominent account, has called *Lifelong Learning for All*. Each organization, by making categorical statements, contributes to the *universality* of LLL. It becomes universal with regard to the life span and the educational, socioeconomic, ethnic, cultural and geographic background.

I will argue in the following section that the very fact that the idea cannot be ascribed to a single, well-defined target population (including countries) turns it into a far more significant phenomenon as it reveals much wider assumptions and expectations about what the *lifelong learner* and the *modern individual in general* is able to do and be like. If LLL is, literally, for all it becomes imperative to look at what it, ideally, takes to become such a lifelong learner. We will see that it seems plausible to relate most of the categories found in the analysis to the individual learner as the integrating core of the lifelong learning model.

What for and why?

There is, to begin with, a dramatic emphasis on what LLL is to bring about in an individual's life. In order to make the centrality of the individual in IOs causal arguments more comprehensible, I used several (partly overlapping) concepts (Con. I.8, I.10, I.12 and I.13). There might well be additional collective goals associated with LLL, such as economic growth, social cohesion or ecologically-friendly behavior, but, judged by quantity[82] and quality, goals linked to the individual learner (from employability to lower fertility) outweigh the collective ones by far.

LLL is, above all, empowerment (or *capacitación* or *responsabilisation*). Empowerment can be economic, which moves it closer to employability (Con. I.10):

> "Employability can best be defined as 'possession of qualities and competences to meet the ever-changing needs of the market and the organisation, as well as the pace of technological change." (ERT 2001:6)

Economic empowerment or employability are important goals in LLL documents and can apply to children, youth, women, students, farmers or, simply, learners.

Economic empowerment does not stand alone and is always accompanied by the more general idea that people take "ownership and control of their own endeavours and destinies" (WHO 2007a:38). It can also take the form of emancipation, although this latter term is rare and is usually applied to women (EU 1995a:2; JICA 2010a:46) or disadvantaged social groups (DFID 2004:1).

Such strong calls for empowerment are always linked to the equally strong belief in individuals' capacities and potential for personal development. This is true for children where ECCE is the first step of "the continuum of lifelong learning for children to maximize their potential as individuals and as members of a productive society" (WB 2003a:56).

But it also goes for handicapped persons:

> "The development by persons with disabilities of their personality, talents and creativity, as well as their mental and physical abilities, to their fullest potential; [… in order; M.Z.] to participate effectively in a free society." (DFID 2011b:20)

And for migrants, where "Adult learning is especially relevant […] as it offers an opportunity to develop their potential" (EU 2011a:123).

Eventually, it again becomes clear that it applies to all people:

> "Education and skills development underpin any strategy of human development and productivity as it is through education that the necessary skills, knowledge and

[82] With 492 findings in 97 documents from 37 organizations, *empowerment* is among the most frequently mentioned concepts in the whole sample.

> aptitudes are acquired, and the creative abilities of individuals released, to open the way to a better life and society." (IMF 2012b:74)

LLL triggers personal development, not only as ECCE or initial education, but in the guise of TVET, which "has much to contribute to holistic human development" (ECOSOC 2011:82). Sometimes "key skills" as part of the LLL curriculum (see below) become simply "personal development tools" (UNESCO 2000:66).

The WB (2011b:13) feels obliged to stress that

> "The development benefits of education extend well beyond work productivity and growth to include better health, reduced fertility, an enhanced ability to adopt new technologies and/or cope with economic shocks, more civic participation, and even more environmentally friendly behavior."

In a similar vein AFD (no date:1):

> "Education has measurable and undeniable effects on demographic development, health, economic growth, environment, social cohesion and peace.[83]"

It is within this often vague realm of concrete economic effects on one side and more vague emotional, physical and mental effects on the other, that turns education for most organizations into a key element of their strategies. Education is here understood as the ultimate means to reach "personal fulfilment, well-being, and happiness" (EU 2011a:22). Such statements can even become transcendental:

> "After all, Happiness in this world and in the Hereafter can be attained when right knowledge is accompanied by ethical action." (IDB 2006a:24)

All this implies a burden for those who educate as

> "The future happiness and success of children and young people and of the societies in which they live depend on schools and the teachers and staff within them." (EI 2012:4)

Arguments about what difference LLL can make in individuals' lives can also be reversed by looking at the causes for LLL. Here, we find arguments that range from economic and demographic changes to more individual-centred human rights. Trade unions ask if there is a right to LLL (IMWF 2006:15; UNI 2006b:23) and UNESCO (2007a:18) confirms that "the right to education is the right to life-long learning" and that "illiteracy is a violation of human rights and a global blight on the human condition" (2010a.94; also 2005a:46).

[83]"*l'éducation a des effets mesurables et incontestables sur la démographie, la santé, la croissance économique, l'environnement, la cohésion sociale et la paix*."

DFID (2011b:20) reminds readers of the fact that the *UN Convention on the Rights of Persons with Disabilities* mentions in *Article 24* that “States Parties shall ensure an inclusive education system at all levels and lifelong learning [...]”. Finally, the EU (2001:30) “will evaluate existing mechanisms providing individual rights to basic skills and/or lifelong learning and their impact on participation in learning opportunities.”

When, where and how?

LLL starts with ECCE and stretches well into late work life. This is the common reading in the literature and can be confirmed through the available documents. In addition, some actors discuss new elements, which have so far remained unnoticed.

First, LLL starts *before* birth. Informed by findings from neurological science, actors place the beginning of learning ever more back to the “period from about three months before birth [...]” as this phase “[...] is critical to the formation of neural pathways, while the first three years are marked by rapid development of language and memory” (UNESCO 2010a:43; also WB 2013:175). This very early period is for all the 15 organizations in the category the foundation for LLL. Such a consensus is, above all, nurtured by the assumption that “human capital is cumulative”, with particular importance of the “first 1000 days” when “ensuring adequate nutrition, health, and cognitive stimulation through a nurturing environment [...] raises returns to later child investments significantly” (WB 2013:86-87).

Second, it can be said that LLL is above all a *transitory* concept. Education and training systems are to become more coherent, finally merging into a “seamless system” (CARICOM 2009:9). LLL is supposed to tackle critical transition moments in a learner’s life: birth (e.g. UNESCO 2010a), from ECCE to primary school (e.g. WB 2013), from primary to secondary education (e.g. OECD 1996), from secondary to tertiary education (e.g. AFDB 2004) or the labor market (most IOs), from HE to work (e.g LAS 2008), from one job to another (most employer and employee representations) and from working to retirement (e.g. EBRD 2008).

These passages are regarded as life course events and organizations seem very concerned about risks involved. Hence, the multiple proposals that aim (a) at guiding learners through the system (see below in the context of the state’s role) and (b) ensuring the visibility and portability of knowledge (Con. IV.30-31). The latter is translated into proposals to facilitate the recognition of prior learning (RPL) as a “system of certification of skills” in which

> “Every person should have the opportunity to have his or her experiences and skills gained through work, through society or through formal and non-formal training assessed, recognized and certified.” (ILO 2000:6)

Such certification systems are taking shape in the guise of the qualification frameworks, emerging worldwide, as we saw earlier in this work. With Gambia and Namibia, two more countries have initiated qualification certification and both East and West Africa are recommended to promote manpower migration and the harmonization of labor markets and education systems (ECOWAS 2009; EAC 2009).

In such efforts to increase portability and permeability (EMWF 2012:1), the importance of non-formally and informally-acquired knowledge is central. This life-wide dimension is exemplified in learning at work, at home or in the community (OECD 1996:121).

Informal knowledge, in turn, is seen with ambiguous feelings. It is both attributed with great potential and knowledge resources, but can unleash these only after formalization (see Section 5.2.3).

Speaking of non-formal and informal settings, we might easily add the role of Information and Communication Technology (ICT), which is often seen as the main medium in these non-traditional learning settings. Organizations across the full range of the sample are convinced that ICT will bring substantial change:

> "We see renewed hope in the emerging technologies that provide undreamed-of opportunities for lifelong learning and that have the potential to enable our countries to leap-frog into the new millennium with hope." (UNESCO 2000:73)

The vast majority of actors make an explicit statement about it or implicitly already use ICT to deliver LLL. The role of ICT is polymorphous. It can take the form of open and distance learning organized at virtual universities (AFDB 2004) along with "digital libraries and resource centers" (UNESCO 2011a:19; also CARICOM 2011:49) and "Education Hot Spots" (USAID 2007:7), creating global "communities of practice" (UNESCO 2011a:19) enabling learners to learn independently and self-directed. ICT promises to reach the hitherto unreached: nomads, rural and remote populations and those wanting to learn " 'round-the-clock' and 'on-the-move' " (EU 2000:19).

ICT is a perfect case in point to show that discourses do not differ substantially between regions of different socioeconomic development. Just as the EU (ibid.) wants to "Provide lifelong learning opportunities as close to learners as possible, in their own communities and supported through ICT-based facilities wherever appropriate […]" as "ICT offers great potential for reaching scattered and isolated populations [...]", organizations from other areas also feel that ICT has "the potential to overcome problems of distance and can be organized in more cost effective ways” (SADC 2007:58). Sometimes ICT simply becomes the “life-long learning tool” (UFM 2012:1).

Either ICT is seen as reaching the unreached or catering for more flexibility and, by this, for more individual learning opportunities. The latter fits well into the broader picture of how organizations imagine learning and teaching to take place. Although this subcategory could roughly be divided into two further themes (more pedagogical discussions on how to teach and more systemic contributions regarding the supply of educational offers), they both converge at the point of learner-centeredness. Systemic arguments hold that educational offers ought to be “tailored to meet individual needs” (IMWF 2006:1) creating a “demand-led” or “learner-driven” (WB 2003b:58) and “customized” (OECD 2008:9) education system where people can store and document their educational assets in “individual learning accounts” (APEC 2004:10; see also Con. III.26).

I loosely subsumed recommendations for *pedagogical* reforms under *active, collaborative and experiental* learning. The organizational field shrinks when it comes to these more specialized learn-theoretical reflections. Here, the UNESCO and OECD do most of the theorization. In its highly academic *21st Century Learning: Research, Innovation and Policy Directions from recent OECD analyses* the OECD (2008:2) states that

> “A set of key findings has emerged from learning sciences research: the importance of learning deeper conceptual understanding, rather than superficial facts and procedures, the importance of learning connected and coherent knowledge, rather than knowledge compartmentalized into distinct subjects and courses, the importance of learning authentic knowledge in its context of use, rather than decontextualized classroom exercises and the importance of learning collaboratively, rather than in isolation.”

Teaching in the future would, then, redefine didactic approaches towards more “active, inclusive and participatory learning” (UNICEF 2012:3) where students make their own “action-based” (CoE 2007:11) learning experience in a more “contextual” and “transversal” curriculum (LAS 2007:32).

Another aspect is the “holistic and inclusive vision of lifelong learning” (UNESCO 2011a:5). Here, the Finnish system is frequently cited as it is where “the opportunities that exist for lifelong learning owe much to the development of a comprehensive and inclusive education and training system and significant investment in human capital” (WB 2003b61).

Sometimes inclusiveness becomes pushed to such an extreme that findings from neuroscience are considered useful for practical consideration. Here, for example, the loss of language capacity in damaged adult brains after strokes, cardiovascular fitness in relation to brain connection activity or the interplay between emotions and learning motivation are investigated up to the point where even the role of pharmacology in education is no longer taboo when discussing whether more equality could be reached if "Extending use of therapeutic drugs that improve memory, attention and energy for human enhancement was a real, social possibility, and may impact fairness and health" (OECD 2004b:10).

Similar to the understanding of teaching and curriculum are changes observed for labor markets:

> "In the knowledge economy, memorization of facts and procedures is not enough for success. Educated workers need a conceptual understanding of complex concepts, and the ability to work with them creatively to generate new ideas, new theories, new products, and new knowledge. They need to be able critically to evaluate what they read, be able to express themselves clearly both verbally and in writing, and understand scientific and mathematical thinking. They need to learn integrated and usable knowledge, rather than the sets of compartmentalised and de-contextualised facts. They need to be able to take responsibility for their own continuing, life-long learning." (OECD 2008:1)

What has been described above as student-centeredness, becomes, here, the call for flexible working time arrangements (ETUC 2006:48 and most other work-related organizations) to pursue studies and "tele-learning/ working" (UEAPME 2004:33).

Who helps?

Instead of looking at what exactly LLL means for other actors, it is easy to mirror these implications by relating them to how they serve the individual learner. Every educational actor mentioned – state, schools, teachers, parents, communities – is considered involved in enabling individuals to become lifelong learners.

For *teachers*, LLL means to "adapt teaching strategies to individual needs" (OECD 2008:9) based on "continual identification of and responses to students' needs" (ibid.:5) and by this creating a "learning environment that is sensitive to their pre-existing structures" (ibid.:9) in order to stimulate "lifelong, purposive, self-planned and self-initiated learning" (PIF 2007:4). Designing "individualized learning plans" (WB 2003b:xx) and "a greater sense of 'managerial' (professional) responsibility for curricula development and change" (ILO 2000a:1) would then be part of their new profile.

Teachers would, in short, become "guides, mentors and mediators" (EU 2000:17; also EI 2012:13) and must serve together with educational personnel "as role models of lifelong learning behaviors and help to facilitate conducive learning environments within the school, the home and the communities" (UNESCO 2009:77).

The role of *states* is usually seen in terms of stimulating LLL, guiding learners in the new system, guaranteeing equal access to learning and monitoring the quality of learning provision, which is sometimes seen at risk due to the "inflation of titles" and the "increasing marketization" (OECD 2004c:18).

Aspects of equity and guidance are particularly interesting. Organizations formulate strong pleas for governments to accept "a special responsibility for those who never reached the first level of vocational qualification in the initial education system" (BIAC 2001a:4). Both business and labor agree that "Public strategies in adult training must above all be targeted at those at risk" (BIAC 2001a:4) and that the "responsibility lies with public policies and should not be left to the individual alone" (ICFTU 2002b:3). This again applies to disadvantaged groups with special emphasis (ILO 2003:1).

Guidance is to become another task for public agencies in the future. The EU introduced the idea of "lifelong guidance" in 2005 for the first time. By 2007, the idea had become a "paradigm":

> "The new paradigm of 'lifelong guidance' contributes to the achievement of the EU goals of economic development, labour market efficiency and occupational and geographical mobility by enhancing the efficiency of investment in education and vocational training, lifelong learning and human capital and workforce development. Traditionally reserved for schools, youth and the unemployed, guidance should become available at any age for any socio-economic group without major obstacles to access. At the same time, the quality of counsellors' preparation, supported by availability of up-to date information, needs to be prioritised in order to orientate learners efficiently and to deliver good service." (EU 2007:37)

Efforts to provide guidance and information are closely observed by Asia, where "individual lifetime learning plans" (or learning accounts and learning passports; APEC 2004:10) are seen as a European invention that are worth considering.

What the future of *schools* may be in this new system has also been given some attention. UNESCO (2009:77) is convinced that

> "The formal school system, however, must be transformed to serve the goal of lifelong learning, striving to guarantee not only access but meaningful, relevant quality learning experiences for all."

Therefore, schools should be given “more autonomy [...] as they develop a base for community life-long learning” (OECS 2001:8) and can become “multimedia centres” or “community learning centres” (OECD 1996:113; also 2008:7).

Compared to suggestions for the state (including schools) and teachers, other actors involved receive less attention. *Parents*, for instance, are to become “key stakeholders” (EAC 2009:78; ECOSOC 2011:20; EU 2005:28) in education, along with social partners and government, where they “actively participate in decision-making through School Boards” (AFDB 2007a:28).

Organizations are less clear on what role *communities*, *trade unions* and (interestingly) *employers* are to fulfill. Some argue that it is imperative to recognize “the role of the social partners in further training, in particular the vital role of employers in providing work experience opportunities” (ILO 2004:3). For trade unions, LLL is part of “Essential obligations of the employer” (IMWF 2006:17).

What?

Considerable efforts have been made by actors to define what a curriculum would need to encompass to do justice to LLL, not without contradictions (see Con. III.8-21). At first glance, curricular recommendations seem to reflect regional differences in that basic skills are more strongly pronounced in the development concept (literacy, numeracy and health education); (Con. III.9). However, where basic skills merge with life skills and (as in some definitions) with the so-called key competencies or meta-competencies, differences disappear and a LLL “core curriculum” emerges:

> “Life skills can be described as ‘a group of psychosocial competencies and interpersonal skills that help people make informed decisions, solve problems, think critically and creatively, communicate effectively, build healthy relationships, empathise with others and cope with and manage their lives in a healthy and productive manner’ (WHO, 2003).” (UNESCO 2007b:56)

There is a further strong agreement on a curriculum beyond any regional, cultural, economic and political differences. More precisely, various actors representing different regions agree on the importance of specific subjects, such as sciences (mathematical-analytical skills and their applications; scientific ways of mastering and applying technological knowledge; information and communication science), social studies (understanding and appreciation of larger society and civic order; cultural, civic and economic studies), humanities (arts and literature), languages (business English; proficiency in three European languages; minority languages) and human rights (see Con. III.11). The latter spans a wide array of more concrete topics ranging from civic education, gender education, peace education and intercultural understanding/ competence to moral reasoning and action, health and disaster prevention (Con. III.11 and III.20).

More often than not, these curricular reforms are considered desirable by actors without specifying the educational level. OECD (1996) favors as early as possible and UNESCO (2001) stresses the importance of such holistic curricula in TVET.

In any case, the centrality of core competences shed light on the learner personality more than on actual subjects or system requirements. They, thus, might reflect a more general opinion on what education ought to convey as in BIAC's (2001b:46) statement:

> "Motivating students to accept change and continue learning throughout their lives should be expressed as a basic curriculum principle."

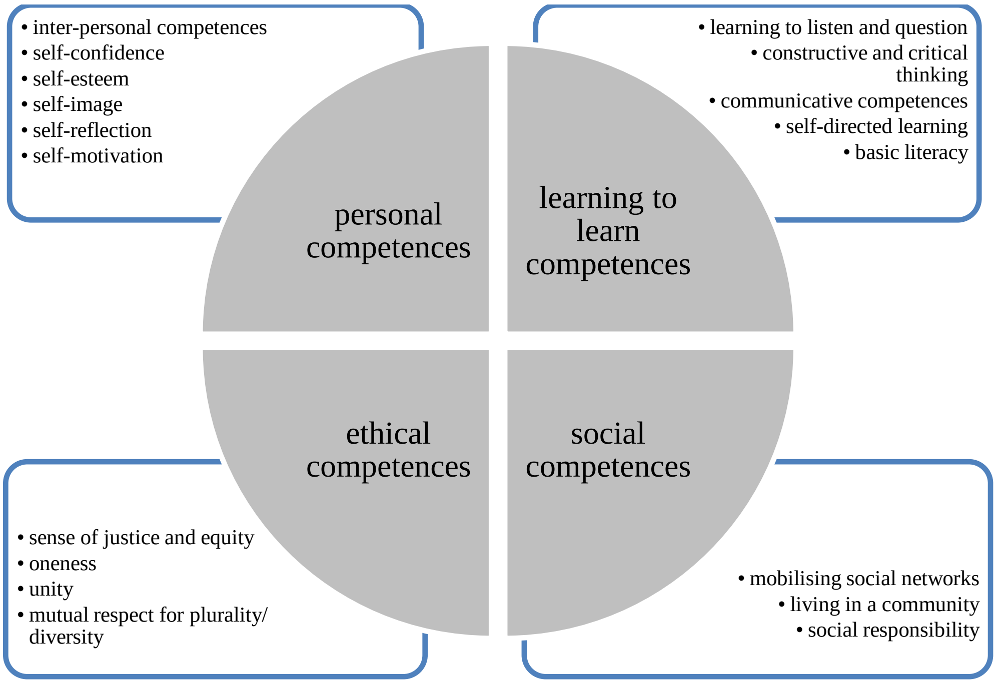
There seems to be a strong consensus on the importance of so-called key competences or LLL competences. Many organizations with diverse missions and from diverse geographical areas, point to a loosely defined battery of key competencies, meta-cognitive skills or, even more general, mental tools or generic skills (Con. III.10 and IV.1). They often revolve around cognitive, social and linguistic skills. The OECD (1996:103-121) alone has identified nine cross-curriculum competencies, the EU (2007c) proposes eight (Table 5.3).

Table 5.3: Cross-curriculum skills and contents proposed by OECD (1996) and EU (2007c)

OECD	EU
- problem-solving - critical thinking - communication - democratic values - understanding of political processes - self-perception - self-confidence - learning to learn - information retrieval skills	- communication in the mother tongue - communication in foreign languages - mathematical competence and basic competences in science and technology - digital competence - learning to learn - social and civic competences - sense of initiative and entrepreneurship - cultural awareness and expression

It becomes quite clear that these "competencies" go beyond technical skills; they also include knowledge, attitudes, dispositions, values and emotional aspects. UNESCO (2008) proposes an even more complex picture (Figure 5.15).

Figure 5.15: Lifelong learning competences (UNESCO 2008)



What is needed?

In line with calls for empowerment and the broad curriculum that targets individual personality and psychology more than knowledge, numerous organizations go on to paint the strikingly well-contoured profile of a prototype of the modern individual at whose core lies the autonomous decision-maker. Of course, this can be the individual as a *learner* or student who – as already touched on in Con. III.25ff. – pursues his studies independently, self-planned and self-initiated. However, the empowerment of the learner also here means "to master the tools of knowledge and build an all-able personality" (LAS 2008:32).

The individual *learner* can also be the future *worker* when organizations advocate the "empowerment of students to make informed career decisions" (OECS 2007:24) or encourage them "to take their professional future in their own hands" ("maîtrise de son avenir professionnel"; AFD 2006:19; translation M.Z.).

If the individual has already entered the labor market, she/he should possess the skills to realize "self-employment opportunities" (UNESCO 2010:2; or EU 2000:11) or "autoempleo" (AECID undated:23). The IMF (2006:108), for instance, states that

> "The concept of lifelong training implies that every employee becomes an actor in his training course, his professional career and his career development."

Given the fact that documents are chosen from a time span often covering more than 20 years, it is possible to report some shifts in organizations' view of the role of the individual. The

OECD is an insightful case in this respect. Nevertheless, in 1996 the organization preferred to see “non-participation not as an individual failing but as a result of structured conditions affecting individuals in manifold, complex ways” (1996:92). It mentions, here, the structural (labor market and financial) and institutional (supply of programs, timing and counseling deficits) barriers that impede learners to involve more in LLL. Later the organization also recognized the “resilience in bureaucratic systems” (2008:8).

Besides structural barriers, the organization has always argued that personal barriers in attitude are perhaps the most challenging ones. When “all must become motivated to learn”, then all “[…] should be actively encouraged to do so, throughout life” (OECD 1996:27). By 2004, however, the OECD (2004c:44) felt that

> “[…] there is an increasingly widespread view among policy makers and social partners that individuals will need to take greater responsibility for their own lifelong learning in the future, including in bearing an increased share of the costs in certain cases.”

Organizations from the sample not only agree in the importance of the individual as an empowered actor in LLL, they are eager to write “scripts” for this new kind of “actor”. It here becomes clear that, what starts as the depiction of a new *learner type*, quickly turns into a much broader desideratum for *individuals in general* who are “to exercise and advance their rights and take control of their destinies” (UNESCO 2009:38). According to UNESCO (1996:21), the millennium requires a change in thinking in general:

> “In the twenty-first century everyone will need to exercise greater independence and judgement combined with a stronger sense of personal responsibility for the attainment of common goals.”

Paradoxically, as much as organizations seek to stress the independence individuals ought to have in their development and transformation, they leave little doubt about where this “unique journey through life” (EU 2000: 17) is to take them and what it takes to get there.

The EU (2000:3) wants to

> “launch a European-wide debate on a comprehensive strategy for implementing lifelong learning at individual and institutional levels, and in all spheres of public and private life.”

Even earlier, the OECD held that for LLL to acquire an “intrinsic (instead of instrumental) value” (OECD 1996: 86) peoples’ “[...] dispositions, values and attitudes [...]” need to become the “realm of legitimate policy intervention” (ibid.:93).

In general, organizations place a dramatic emphasis on this “private life” and the “dispositions, values and attitudes” therein by establishing a firm link between competences, skills, motivation and attitudes as, for instance, with entrepreneurship:

> “Specific psychological traits are associated with entrepreneurship, such as a personal need for achievement, a belief in the effect of personal effort on outcomes, selfconfidence, and a positive attitude toward risk.” (WB 2013:114)

Entrepreneurship might well be one example of such “psychologicalization”, but it is by no means the sole one. What takes shape, then, is an impressive list of characteristics or personality traits to which organizations from all areas and of all types have something to contribute. Table 5.4 provides a selection of personality traits that are considered imperative for lifelong learners.

Table 5.4: The lifelong learning personality (selection)

Statement examples	organization/ reference examples
creativity	BIAC (2007:19); BusinessEurope (2012:4); UEAPME (2003:65); OECD (2004a:2); UNICEF (2012:73); WB (2003b:30); EuroeAid (2010c:211); SNV (2007:15); ASEAN (2009:89); EAC (2009:37); SAARC (2007a:2); OAS (2005b:2); OECS (2002:8);
teamwork	BusinessEurope (2012:4); ERT (2001:7); UEAPME (2002a:2); ILO (2000:3); IMF (2006:53); UNESCO (2000:39); UNICEF (2003:10); WB (1999:iv); APEC (1999:211); SAARC (2007a:21)
responsiveness/ motivation/ spirit of volunteerism/ initiative/ commitment	EI (2012:76); IMF (2012b:75); OECD (2004a:2); UNESCO (2000:27); UNICEF (2003:14); WB (2003b:79); ASEAN (2009:89);
entrepreneurial attitude/ leadership/ business skills	BIAC (2001b:46); ERT (2001:7); EU (2007c:11); IMF (2006:53); UNESCO (2000:27); SAARC (2007a:21)
risk-taking	WB (1999:1); EU (2000:11; 2007c:11); PIF (2005:5); DFID (2011c:13)
healthy/ active/ fit/ reduced risk behavior	UNICEF (2003:10); WHO (1998:109); WB (1999:1)
discipline/ work effort/ reliability	WB (2013:175); USAID (no date:1); APEC (1999:211)
critical awareness/ thinking	UNESCO (2000:27)

Due to the sheer number of suggestions, such a list can only be selective. Other considerations, such as self-confidence, trust, decision-making skills and the omnipresent plea for greater independence and autonomy are to be added. If we also remind ourselves of the core principles of the curricular recommendations above, suggestions become an almost innumerable bundle of cognitive, social, ethical/ moral, behavioral, communicative, emotional skills, competences, qualities, traits, dispositions, values, attitudes and abilities (see Figure 4.17).[84]

Certainly, those features that some might associate with “neoliberal” thinking are visible and more frequently uttered by business associations, but by no means exclusively by them. When Figure 4.17 talks of “pro globalization and pro free market“, it does so based on UNESCO's (2000:53) discussion on educational matters in the Arab world, where the organization counts among the two key priorities for the region “[...] a positive attitude towards globalization, and the challenges of the world market competition and free trade.”

It should also be warned against interpreting this learner as solely an economic actor. We will see in the discussion that economics as a discipline is certainly involved in this model-making, but is supported by wider assumptions about what the “modern man” is supposed to look like.

Figure 5.16 compiles both attitudes and values (e.g. pro human rights) which are conveyed through curricula proposed by IOs, as well as more emotional and behavioral aspects. The fact that analysis has identified such a detailed psychograph might hint at a new quality in educational theorization and at the construction of an actor which has so far always remained implicit, but is now spelled out as such. The following chapter sheds light on the construction of this lifelong learning actor from the wider perspective of its environment and lays bare mechanisms of theorization.

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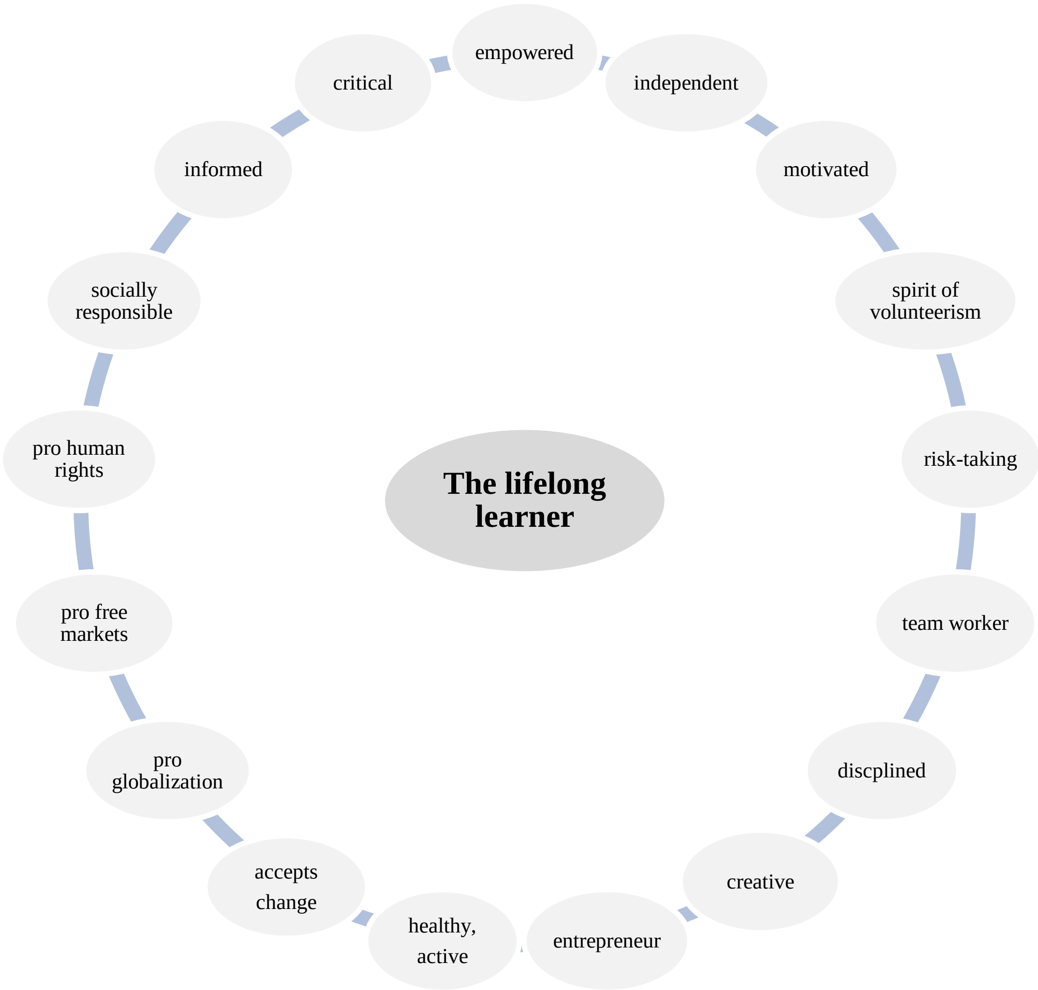
[84] The terminology increases in complexity with its increase in range. See OECD (1996), OECS (2002:8), SAARC (2007a:21), EU (2007c) and UNESCO (2008), which – if taken together – make for almost 40 different competence areas (not including vocational competences).

Figure 5.16: The lifelong learner



5.2.3 Lifelong learning as ideology

Guided by additional coding families (culture) and neoinstitutionalist assumptions of education as an institution and as an ideology, analysis yielded insights beyond the role of the learner. In a more epistemological vein, what emerged might be called a "grounded ideology". I will show in the following section that LLL is a cultural ideology. Ideology, here, carries neither positive nor negative connotations. As noted earlier, the term ideology, for my purpose, describes a "general interpretive scheme" (Drori, Meyer & Hwang 2009:24). The institutionalization of such schemes is marked by the fact that “they become more invisible and eliminate more alternatives” (Meyer, Boli & Thomas 1987:37).

This chapter is organized in four sections. Three represent the world cultural goals and principles (progress/justice, universality and rationality) that are inherent in organizations’ depictions of LLL. The fourth section analyzes lifelong learning in narrative terms, more precisely the dramatic and affective arguments that situate LLL in frames of history and identity.

Each of the themes is treated as problematic in an analytical perspective (as opposed to a normative perspective). They become problematic as they reveal the extraordinary tensions in IOs’ theorizations. Tensions between what LLL is believed to bring about and what is known it actually can (*rationality*), between its universal relevance and the need of contextual adaptation (*universality*), between the celebration of diversity and respect and the de-legitimation of tradition (*progress* and *justice*) and, finally, between the novelty and continuity of the concept that is to simultaneously support local and global identity (narrative).

Each of these tensions, in turn, reveals the ideological character inherent in IOs‘ notions of LLL. Many of the tensions represent uncertainties, dilemmas, inconsistencies and conflicts in argumentation, yet the plea for LLL remains unaltered.

Lifelong learning and the problem of rationality

The theorization of LLL is marked by a peculiar tension between what is *believed* or *theoretically assumed* education and LLL can bring about and what IOs can *ascertain* – based on their analytical apparatus – it actually does bring about. This tension is most visible in organizations that discuss findings from educational research. The WB, as the most research-oriented organization in the sample, is particularly fruitful in this respect.

Based on human capital theory, the WB (2003b:6) states that

> “Technological progress is likely to raise the value of education in producing human capital (Schultz 1975). As developing countries liberalize their trade regimes and open themselves to technology transfer from industrial countries, the value of education rises. Education thus becomes more important.”

In a similar logic, the OECD (1996:32):

> “The share in value-added high technology industries has increased from 1970 to 1991, in some countries more than in others. Although causality cannot be inferred, this link points to a positive relationship between skills, technology, innovation, productivity and competitiveness.”

It seems impossible to determine exactly what the nature of this relationship is, and it is worth noting that the high-tech share had increased before LLL had been put on the agenda. When it comes to assessing the impact of education as a causal factor, the WB (2003b:6) is cautious.

> "Large indirect effects of education, operating through intervening variables, raise the social rates of return significantly, sometimes with long delays. The size of these effects is not clear, however, with some estimates yielding negative and others yielding very high positive values [...]."

In part, the empirical ambiguity is explained by the difference between quantity and quality in education:

> "Research assessing the link between the quantity of education (in terms of enrollment or average years of schooling) and economic growth has been encouraging but somewhat mixed, […] perhaps because ultimately what matters for growth is not the years that students spend in school, but what they learn." (WB 2011b:12)

The AFDB (2007b:5) is aware of the same problem in technical and vocational skills development (TVSD):

> "The many benefits claimed for TVSD (e.g. higher productivity, readiness for technological change, openness to new forms of work organization, and the capacity to attract foreign direct investment) all depend on the quality of the skills acquired, and a dynamic environment in which they can be applied."

What exactly improves quality is difficult to say, as the EU (2001:48) admits when stating that, "At present, the relationship between resources and the quality of lifelong learning remains unclear."

The controversy about the benefits of specific kinds of LLL can also be observed in more country-specific contexts:

> "[…] compared with general education, TVE led to higher earnings in Rwanda, Sri Lanka, and Thailand, more or less equal earnings in Indonesia and India, and lower earnings in Pakistan. […] The reach of TVE in rural areas is often very limited. In some countries, TVE has actually reinforced socioeconomic inequalities rather than fostered social mobility. Poor quality and inequitable access are key constraints in many countries." (WB 2013:176)

Reviewing educational impact in six countries (five in Africa and India) the AFDB (2007b:73) warns that the "[...] 'economic rates of return' literature must be interpreted with great caution" since

> "Changes and complexities in the labour market, especially in contexts where regular waged jobs are an exception rather than the rule, make the validity of data sets used to estimate rates of return highly dubious."

In the same vein, the WB (2012:48) states that “the available literature is controversial on the rates of return to adult education, with some estimates pointing to no or very low returns and others being more sanguine.”

The 'economic rates of return' approach is, however, *one of the very few* econometrically measurable bases of evidence (for policy-making) available. That might be one reason why most of the organizations cling to it, despite its shortcomings.

Rates of return can be measured privately (or internally), as changes in earnings and enhanced employability, or publicly, as higher tax revenues and reduced social transfers. The impact on these rates, however, strongly varies depending on the educational sector and, even more so, on who funds this educational sector. For instance, the EU (2005:15) notes that “[...] countries increasingly expect individuals and firms to contribute to the costs of adult continuing training and higher education where there are high private rates of return.”

Inasmuch as returns on adult education are mostly private, some IOs therefore consider private funding as justified, although these thorny issues remain somewhat marginal in the policy papers (an exception: OECD 2004c for example). The debate changes when discussing primary education:

> “That said, there is compelling evidence that private and public rates of return to education at the primary and secondary levels are sufficiently high to mark this out as a good investment for society.” (UNESCO 2011b:30)

Identical positions can be found in WB (2013:86).

Confronted with empirical complexities in the vocational education sector, the OECD (2007b:11) – like many other organizations – relies on theory-based policy-making:

> “Most educational policy makers believe that there is a link between qualifications systems and lifelong learning; however such a link has never been proven. [...] how can national qualifications systems promote lifelong learning in terms of quantity, quality, efficiency and equitable distribution of learning opportunities? The theoretical links between national qualifications systems and lifelong learning are termed mechanisms and each one should have the capacity to change the qualifications system to make it more conducive to lifelong learning. If such mechanisms can be identified, understood and then transformed into concrete robust relationships, policy makers will be provided with a rationale for reforming qualifications systems with lifelong learning benefits in mind.”

Note that in absence of any empirically-proven link, the theoretically-assumed links make their way into policy-making.

Evidence is not only awkward or absent when assessing educational effects. The effects of more specific reform policies, such as decentralization, an idea often associated with LLL in less industrialized countries, are also subject to controversial findings.

For the IMF (2007b:73; 2012:xviii), for instance, decentralization is an unconditional requisite for good governance in its project partners, Mozambique and Ghana, where it is thought to have a strong impact on combatting corruption. This assumption, however, holds in theory at best, as UNIDO's (2007:28) case study of Bulgaria shows, where “[...] corruption pressures at local levels augment among municipal officials, councillors and mayors most probably related to the process of decentralization […].“

That the recommendation is not purely for those countries considered developing, becomes clear if looking at EU (2011b:21) suggestions for adult education reform where it is believed that “[...] evidence is emerging that decentralisation, increased autonomy and partnership contribute to successful adult learning reform.”

Like most other organizations, the EU does not provide any reference to this evidence. In the same year, UNESCO overtly admits that in theory “[…] decentralized structures offer greater accountability and responsiveness to local problems [...]” but that it “[...] can also weaken education provision and widen inequalities” (UNESCO 2011b:132).

Furthermore, evaluations of projects that aim at decentralization illustrate the difficulties in implementation. After USAID's four-year work in Indonesia, a first field evaluation conceded that “[…] it is not yet clear how the accreditation will be used or how schools can improve their performance” (USAID 2007:5) and that “The display of school budgets clearly has ushered in a new era of openness but, on close inspection, the budgets were nearly identical from school to school and the information in them was generally nothing different from that already widely known” (ibid.:9). Such examples of loose coupling are numerous, and not only with regard to de-centralization.

While, in many cases, empirical evidence is mixed or absent and theory might “iron out” the uncertainties, there are clearer instances of education’s negative effects. Although terms such as over-education or mal-education (wrong education) might evoke strong feelings, they simply point to the fact that education systems and labor markets do not work in conjunction as is often implied in theoretical accounts:

> “Education is not an automatic panacea for delayed employment. In many Arab states, young people with secondary and tertiary education face longer periods of unemployment than their peers with only basic education. Similarly, in several countries of sub-Saharan Africa, including Burundi, Cameroon, Kenya and Nigeria,

> youth with secondary and tertiary education have higher rates of unemployment than those with lower levels of attainment [...]" (UNESCO 2010a:83).

More general, for the Middle East and North Africa, the WB (2013:7) summarizes that "A fairly well-educated and young labor force remains unemployed, or underemployed, and labor productivity stagnates." For East Africa (Kenya, Burundi, Rwanda, Tanzania, Uganda), EAC (2009:77) states that "Most graduates continue to be jobless as demonstrated by the unemployment figures." For Papua New Guinea, PIF (2007:12f.) bemoans that "Each year 80,000 school leavers graduate from educational establishments, but only about 5% are absorbed into formal employment."

The discussion on the benefits and limits of education is particularly interesting when case studies are mentioned. In a country review, EuropeAid (2010c:362) summarizes after more than ten years of sector aid (70 million €) in Tunisia:

> "Support to general education aimed at an improvement of employability opportunities of graduates has not reduced the rates of unemployment of school leavers, because general education is expected to prepare access to higher education. Part of the unemployment problem is linked to the TVET system, which is still underdeveloped in Tunisia, and the capacity of the Tunisian economy to create the appropriate number of jobs fitting the needs of the new generations is still insufficient, whatever the quality of the education system."

In a review of three projects[85] initiated to improve TVET and access to higher education, final evaluations are sober, particularly in the case of Chile:

> "The program delivered education to 250,000 low-income students during 2003–08. Its availability helped increase overall adult enrollment from 2003 through 2006 (Appendix A). However, by 2007, overall adult enrollment had declined to previous levels. […] results on drop-out rates also caused concern. About half of the students did not reach certification, with about a quarter quitting before examinations. There is no assessment available regarding why that happens. […] The Chile Lifelong Learning Project failed to provide access to a technical education with better curricular links across education levels and better tailored to labor markets.[...] enrollment in technical education expanded markedly, doubling between 2002 and 2009. But this was attributable to massive increases in public financial aid for technical education and had little if anything to do with any expansion of the kind of technical education that the project expected to achieve.[...] Although evaluations of impact on doctoral enrollment

[85] Two in Chile and one in Colombia; combined funding volume: roughly 700 million US$; period 2002-2009.

> are not available, the data suggest that this support may have contributed to the expansion of enrollment in national doctoral programs." (WB 2012:11f.).

Many IOs believe that the main cause for such phenomena is the mismatch between what education systems produce and labor markets need. Member states, therefore, have to assure that "education is completely linked to the labor market" (EAC 2009:77), especially in those areas where, for instance, the mismatch between educational attainment and employment can mount up to "a third of employees in members of the Commonwealth of Independent States and Mongolia" (EBRD 2008:61).

BusinessEurope (2012:2-3) sees the problem in neoclassical terms:

> "The unemployment rate of the EU now stands at around 10%. This corresponds to 24.5 million men and women without jobs. At the same time, there are 4 million unfilled vacancies in the EU. The explanation for these conflicting figures is a clear mismatch between the supply and demand of skills. The fact that educational systems' outputs often do not correspond to labour market needs contributes to unemployment, in particular among the young."

As a solution, thirteen organizations recommend anticipating labor market needs. Here, LLL starts to again greatly resemble the "mechanical and old-fashioned manpower planning" that many organizations have come to see as outdated, as it was thought to have "given way to dynamic skills development" (WB 2013:176f.).

However, mismatches are again (still?) the result of "inadequate manpower planning and labour market analysis" (CARICOM 2009:6). Part of this effort to anticipate labor market needs is making educational intervention shorter. For Latvia, the IMF (2013:43) finds that:

> "The labor market has changed more quickly than the supply of VET programs (CEDEFOP, 2012b). The real work environment, technologies, working methods are in a constant transformation, while it takes time and requires substantial financial investment to adjust the study programs and the equipment to the actual situation in the labor market. The MoES (2009) (Ministry of Education and Science; M.Z.) found that, given changing labor market needs, demand increased for VET programs with a relatively short duration."

Organizations hope that education and labor market needs can be brought together, if only the right methods have been found:

> "Experience suggests that the relationship between different aspects of qualifications systems is also important in determining how far they translate into lifelong learning results, but again we need to develop methods and measures to provide concrete evidence to enable governments to fine-tune their qualifications systems and policies." (OECD 2007a:7)

Proposals to “align education more closely to the 'needs' of industry and commerce” (SAARC 2010a:33) also mirror the controversy about what type of education is best, general and liberal or vocational and specialized. Here, business associations are actually more in favor of more general education than most of IOs that have something to say about the issue.[86]

Only one organization (WB) articulates the unpredictability of labor market needs and the possibility of “market failures” as barriers to such planning efforts. Unpredictability of primarily[87] market behavior is mentioned by the WB (2013:175):

> “The importance of skills cannot be over-stated [...]. But caution is needed before jumping from this recognition to the launching of large skills-building programs. The root cause of skill shortages or mismatches might not lie with the education and training system. Shortages and mismatches may instead result from wrong signals generated by market distortions and institutional failures elsewhere in the economy.”

Such large skills-building programs are, however, being launched with the help of IOs in Turkey (250,000 courses per year) and India, where up to 500 million people are to be trained and retrained by 2022 (WB 2013:175).

In other instances, market failures are situated *within* the educational system itself, defined as “drop-outs from education and training or mismatches between supply and demand” (WB 2003b:55) or, in the South Asian context, where countries have “great difficulty in providing educated labour and modern skills due to market failures that yield poor access to postsecondary education in the region” (SAARC 2007a:11f.).

Despite many empirical ambiguities and – it appears – dilemmas, few organizations admit that there might also be obvious risks associated with LLL. Apart from general over-education or mal-education, IMWF (2009:44) sees that

> “[...] the expectation of leaders, citizens, and students of national education systems – that education can be an engine of economic progress and a chance for people to transform and improve their lives – all point to the immense challenges that these systems face and push for ever greater flexibility, all of which increases stress and insecurity among workers.”

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[86] See OECD's (1996:103) account on the European Roundtable of Industrialists in 1995.

[87] But not exclusively: unpredictability of food supply and prices matter in educational work in Ghana (IMF2012b), unpredictability of aid flows matters for all aid-dependent states when planning education (UNESCO 2007b; EuropeAid 2010b),

Moreover, some organizations are aware of widening educational inequality: Reviewing ten years of EFA, UNESCO (2000:13) noted that “growing educational disparities within and between countries are matters for serious concern.” Another ten years later, the picture has not changed (UNESCO 2011b:31). These inequities can be found in the areas of “ECCE, primary and secondary education, TVET and adult literacy” on grounds of “Gender, Poor/vulnerable, HIV/AIDS Disabled/special education needs, Geographic (e.g. region), Conflict-affected areas, Ethnicity, Out-of-school children, Rural/urban, Religion, Not specified” (ibid.). It seems there is inequity in every education sector and with regard to every criterion possible.

Almost unchanged, the argument goes for more industrialized countries, too. The OECD (2004c:21) warns that “the patterns of participation in lifelong learning that prevail so far run the risk of *further undermining* social cohesion rather than *enhancing* it.” Few years later, the tone becomes even darker:

> “On a broader, societal, level, the large structural changes threaten a new polarisation between the knowledge “haves” and “have-nots”. The distribution of learning opportunities is quite uneven. Unemployed individuals have fewer learning opportunities than the employed; those in small and medium-size firms have poorer access than employees of larger firms; opportunities for those with secondary school education or less are significantly fewer than for those with post-secondary education; women are at a relative disadvantage compared to men. The large earnings gaps between those with and without post-secondary education, furthermore, widen over the lifetime. These discrepancies can damage the very basis of democracy.” (OECD 2007b:9)

Rationality might not only refer to the primacy of scientific objective knowledge in the LLL debates, it might also be associated with the behavior of the actors involved. If rationality of the actor is assumed, but his/her action turns out to be marked by the opposite, neoinstitutionalists speak of decoupling.

Sometimes bilateral donor agencies reveal insight into such decoupling phenomena. In the decentralization project in Indonesia mentioned above, USAID (2007:9-11) is bemused:

> “Interestingly, budget information on school fees or other funds collected by school committees were not always available and the several times new classrooms were being constructed, budgets for the project were not displayed. A second "mixed" signal that is difficult to interpret is the fact that a substantial amount of inefficiency was observed in the school system. […] For example, some schools were over-staffed and had very low student/teacher ratios, while others had student/teacher ratios so high (45-50 pupils per class) as to make the application of active learning methods difficult. Another example of inefficiency might be seen in the often heard stories of principals being trained in

> school-based management techniques only to be transferred to another school, leaving one school without a SBM-trained leader and a MBE-trained (Managing Basic Education; M.Z.) principal in a school without a responsive faculty or community."

Similarly, but on a larger scale, in evaluating the evaluation of a "mass functional literacy programme" in Ghana, reaching more than 35,000 people, DFID (2004:1f.) found that:

> "A second problem is that monitoring and reporting procedures were not established until the ODA (Official Development Assistance; M.Z.) project was almost complete. During this period, NFED (Non-formal education division; M.Z.) was so understaffed that it operated on an emergency basis, trying to cope with the massive expansion in numbers of classes with very limited resources and staff. No attention was given to reporting and monitoring. Even when the MIS (Management Information System; M.Z.) was eventually set up, the reporting system was cumbersome and did not provide a clear picture of expenditure, or of numbers of classes and students, in the pilot areas or elsewhere. No baseline studies were carried out. Indeed, there are no reliable data on the project before 1993. Although a rudimentary project framework was prepared by IEC (International Extension College; M.Z.) as part of its original report it was not used for project monitoring. Nor could it be made to form the basis for the evaluation study."

Examples of decoupling are endemic, and not confined to less industrialized countries. They can be found hidden in the frequent references to quality education in my sample and the EFA agenda in general. Occasionally, a fear of quality loss is associated with privatization of educational delivery (OECD 1996; LAS (2008:63). As noted above, sometimes decoupling takes the form of corruption, as when discussing – in brackets – craftsman apprenticeship in Kenya, where "[The reality is that there were very major problems of corruption in the project, and the voucher element proved to be entirely unsustainable.]" (AFDB 2007b:13).

Lifelong learning and the problem of universality

While the theorists of LLL are still searching for more robust and optimistic evidence to corroborate their pleas, they have already started to promote the idea with a paradoxical mix of universal relevance and local contextualization. Such inconsistencies (or internal conflicts?) are sometimes observable if documents are analyzed over time. Discussing the role of educational measurement, in 1996 the OECD still feared that:

> "Standardisation within countries […] has been further reinforced by the introduction of national assessments of student performance and, in certain countries, standardised examinations leading to recognised qualifications […]. Standardised achievement tests […] are at odds with the "cross-curriculum" skills most sought in a framework for lifelong learning: motivation and self-confidence; social and communication skills; self-managed learning; and capacity for independent information search, retrieval and

> analysis. As it stands, the standardisation of school learning, and testing, can be at cross-purposes with the cherished ideals of diversity, individualisation and, in the long run, incentives to learn. […] There is currently a danger that what can be most reliably assessed will become the criterion of quality." (OECD 1996:203)

Only few years later, the organization is at the forefront of large-scale cross-country assessments for virtually all educational sectors: the Programme for International Student Assessment (PISA) was launched in 2000 and now includes 74 countries (2009/10); in 2008 the first worldwide Teaching and Learning International Survey (TALIS) took place and in 2012 PIAAC, the Programme for the International Assessment of Adult Competencies, was conducted in 24 countries for the first time.

For vocational training, the organization now declares that

> "There is a need for sound conceptual work about the best way to define systemic variables and to produce appropriate indicators describing national qualifications systems. There is a need for research on the best way to relate national qualifications systems to lifelong learning through quantitative variables. There is a need for international data to be collected as an empirical counterpart for the conceptual work proposed above." (OECD 2007a:15)

In general, IOs are keen in proposing sets of indicators to measure LLL. The indicators in use are extremely diverse and often mentioned in the context of LLL or general education alike. While the OECD is in charge of performance indicators across the educational ladder mentioned above, UNESCO provides World Education Indicators and the EFA Development Indicator (EDI). Other organizations try to tackle more systemic questions regarding participation, quality and wider institutional contexts.

The EU (2002) proposes fifteen quality indicators[88], the WB (2003b:104-107), in turn, discusses no less than 20 indicators for how to measure the transformation of education systems into LLL systems.[89]

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[88] 1. Literacy, 2. Numeracy, 3. New Skills in the Learning Society, 4. Learning-to-Learn Skills, 5.Active Citizenship Cultural and Social Skills Area B: Access and Participation, 6. Access to Lifelong Learning, 7. Participation in Lifelong Learning Area C: Resources for Lifelong Learning, 8. Investment in Lifelong Learning, 9. Educators and Training, 10. ICT in Learning Area D: Strategies and System Development, 11. Strategies of Lifelong Learning, 12. Coherence of Supply, 13. Counselling and Guidance, 14. Accreditation and Certification, 15. quality assurance;

[89] 1. adoption of national standards and accreditation system; 2. partipation and improvement of learners; 3. adult performance in assessments that measure new skills; 4. adoption of learner-centered education practices; 5. alignment of quality control mechanisms to implement learner-centered pedagogical practice; 6. increase in flexible delivery of learning opportunities (ICT); 7. changed quality assurance mechanisms; (certification); 8. improvement in articulation between different types of learning and recognition of informal learning; 9.

Since project-based work on education has traditionally been accompanied by clear target indicators, such approaches are further enlarged in the LLL context. The ADB (2007:16-21), in its senior secondary education project in Uzbekistan (period 1999-2007; loan of $53 million), has established a set of almost 40 indicators that range from graduate employment rate and gender balance to curriculum flexibility and "modern teaching-learning methods used in over 25% of lessons in model schools".

However, in discussing quality issues in education DFID (2011a:1) warns that:

> "Although value added measures are now commonly used to evaluate school quality in UK and some other high income countries, many low income countries do not collect longitudinal data. Therefore raw measures of pupils' academic outcomes and transition rates to the next educational level are used as the only key indicators of school quality."

If the impression sometimes arises that IOs tend to work in a frame of labor division or in overlapping initiatives (or even in competition), there are, on the other hand, growing efforts to bundle (and further extend) tasks like large-scale data gathering. The Group of Twenty has called on the ILO, UNESCO, WB and OECD "to create internationally comparable skills indicators by 2012, with particular reference to low income countries" (UNESCO 2012:82).

Furthermore, OECD and WB have recently started to work together on the Skills Toward Employment and Productivity (STEP), where cognitive skills (based on PIAAC), non-cognitive skills (psychometric scales) and technical skills are measured. To date, more than ten less industrialized countries have participated (UNESCO 2012:83).

It is common gambit in LLL theorization to refer to a "real" LLL model (or system or framework – IOs themselves are not sure; see Con. V.18ff.) that can actually be found somewhere. At times, this model can be found in Germany, Scandinavia or Europe in general,

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competency-based assessment and qualification; 10. policy deepening linkage between education and labor market; 11. increase in degree of administrative and financial decentralization and participation of stakeholders in decision-making process; 12. increase in degree of openness within a country and toward international community; 13. decline in inequity between and within countries through policy measures; 14. adoption of sound education management system within monitoring and evaluation system (focus on outcomes); 15. improvement in accountability and transparency (e-government); 16. creation of legal regulatory framework the creates level playing field between public and private providers […]; 17. increase in share of total education resources; 18. use of traditional loans, human capital contracts, graduate tax, income-contingent repayment loans; 19. use of vouchers, entitlements, individual learning accounts, education savings account, learning tax credits; 20. decrease in direct administration and increase in subsidies in certain types of learning.

at times in Mexico or Chile. The substance of these models also reflects the diversity in what IOs mean by LLL.

UNESCO (2007b:161) focuses on ECCE: "In Sweden, government drives the effort for gender equality in early childhood education that incorporates a gender perspective." The WB (2003b:96) is interested in the same country, since "Sweden has proposed creating ILAs (individual learning accounts, M.Z.) in which learners and employers deposit funds for competency training."

Addressing higher education, the EBRD (2008:61) makes clear that "transition countries have a higher proportion of social science graduates at tertiary level than the OECD average and some selected comparator countries (such as Sweden)." This is problematic "in terms of vocational training" (ibid.) since Sweden has almost twice as many students enrolled in engineering and manufacturing[90], in other words, studies more relevant to the labor market.

Apart from these "High performing countries such as Finland and Sweden" (EU 2005:13), organizations mention "noteworthy" in regard to Chile (UNESCO 2007a:15) "because of its solid education system and its progressive advances in the field of ICT and education" (IADB 2011:1).

Occasionally, IOs use each other to support their pleas for LLL. Mostly, this occurs in terms of indicators, definitions, research findings and consulting. Here, smaller organizations usually rely on the bigger ones (Concepts V.8ff.).

Examples include organizations pointing to the European qualifications frameworks (UNESCO 2009:23; DFID 2011c:7) or the European Higher Education Area (WB 2003b:69), the European Globalization Adjustment Fund that covers "job search allowances to individuals participating in lifelong learning and training activities" (WTO & ILO 2011:119). SAARC (2007a:46) wants to copy EU's CEDEFOP. CARICOM (2011:34) is particularly interested in the "Inclusive European Information Society"[91] and strengthens its arguments by saying that the "[…] EC defined the knowledge society as supporting lifelong learning, creativity and innovation".

In the same vein, organizations refer to or call on each other to identify "best practice" (for the latter, see WFTU 2004b, for example, referring to ILO). Sometimes the practice of

[90] And, although not mentioned in the text, twice as many in health and welfare. Apart from that, the remarkable fact is that the numbers are almost identical.

[91] On-line search for this term has not yielded any results.

referring to some model becomes highly confusing and contradictory. While outside-EU organizations refer to the EU as an LLL paragon, the EU itself refers to either its member countries or back to other outside-EU organizations (EU 2002b:12).

There is further a peculiar tension between universalistic social technologies, such as measurements, indicators, bench marks, best practices and modeling, that propel more planning capacities, more anticipation of future events and more quality boosts on the one hand, and the plea for tailored approaches to educational reform on the other.

Each tailor, however, has to choose from a limited number of policy fabrics. The UNESCO WER from 2012, for example, "identifies the ten most important steps that should be taken. These can be tailored to fit country-specific circumstances and needs" (ibi.:299).

UNICEF (2012:51) holds that

> "there are two general ways to approach the transformation of the education sector. Module 4 discusses the benefits and limitations of each and provides questions for consideration as national planners, policymakers and other stakeholders decide what approach is best given their particular context. Every context is different and will require a tailored response."

Sometimes contradictions are very stark within a single text passage. In its paper on sustainable consumption and production (SCP), UNIDO (2011:29) emphasizes

> "the need for developing countries to develop their own sets of indicators which are specifically tailored to their information needs, sustainability priorities, and national frameworks and strategies of their own country [..]."

Yet on the same page, the organization states:

> "In their recent National SCP Guidelines, UNeP (UN Environment Programme; M.Z.) notes the general inadequacy of national efforts to measure progress on SCP policy and programme implementation. Developing countries need to overcome a variety of institutional, technical and political constraints when developing SCP indicators, such as inadequate resources, data reporting units, monitoring networks, and lack of political willingness. UNeP has developed a guidance framework to assist developing countries in measuring their achievement towards SCP objectives."

The WHO (2007b:2), which promotes lifelong learning as "lifelong physical activity", is persuaded that "The concepts and strategies presented in this document apply to all countries, however due to variations in resources and needs, programmes should be tailored according to the circumstances prevailing in each country".

The WB (1999:31), in its first document mentioning LLL self-critically, declares its

> "strengthened insistence that the particular circumstances of each country demand carefully tailored solutions, and the realization that progress towards the education goals requires purposeful partnerships – will help the Bank avoid past pitfalls, improve performance and outcomes in education, and bctter serve clients. The ultimate success of this strategy will need to be judged country by country [...]":

In the same document, the Bank (1999:31f.) enumerates the numerous ECCE projects it is funding, with "specific objectives and program options tailored to the context of the client countries". For instance, "In Uganda, mass communication strategies are targeted to parents whereas in Nigeria, mass communications are targeted to young children, adapting the US Sesame Street model" (ibid.).

Consider the following DFID (2011c:13) "Key elements of success" in promoting skills development globally:

> "• a participatory approach applied, with a wide range of governmental, non-governmental, community and business partners involved in all stages;
> • all skills development activities tailored to the specific geographical, social, cultural and economic context of the relevant community and participants;
> • the programme approach integrates gender, empowerment and reproductive health perspectives into course content and methodology;
> • the training methodology is learner-centred, participatory and flexible, and focuses on building trainees' selfconfidence;
> • curriculum content focused on technical, entrepreneurial and life skills development (critical thinking, problemsolving, risk-taking etc.) and also to be competence-based and incorporate on-the-job internships or production learning opportunities."

Not only does this list contain a contradiction (claiming to be culture-sensitive but being Western), with slight changes in wording it could describe educational reform recommendations in any locale around the world and in most educational sectors. Similar instances of universalizing particularities can be found in most organizations that deal with less industrialized countries (USAID 2003; GIZ 2012a; EuropeAid 2000a).

Lifelong learning and the problem of progress and justice

The inherent cultural modernism (with rationality and universality as principles and progress and justice as goals) is perhaps most revealing when LLL meets "traditional" social order. On a large scale (200 references in 34 documents from 20 organizations), organizations evoke the contrast between a formal (modern) and an informal (traditional) economy, education and training system, which in Africa "are the source of 80-90% of all basic skills training" (AFDB 2007b:13).

Assessing the African situation, the AFDB (2007b:33) states that

> "Obviously there are many disadvantages of such an informal system. The training is often based on traditional technology. The theoretical learning is weak and the training is limited to particular products or phases of production in the enterprise. Therefore, the trainees are unable to then apply their skill to other activities and it reduces their employability in any other industry or to operate any other type of machine."

The so-called informal economy is a case in point. As the WB (2013) makes clear: "Regardless of the specific definition used, informality is generally associated with lower productivity." Therefore, "making traditional education and institutions more flexible [...] by using technology" (WB 2003b:46) is imperative.

Training systems and the labor markets are not the only examples where cultural rationalization occurs:

> "In many households worldwide the care of young children is organized with the help of female kin or friends. Like mother-centred child-rearing, such care arrangements are informal." (UNESCO 2007b:121)

Such "informal arrangements" are considered as being at the root of some educational problems, such as low participation:

> "This problem (low participation in ECCE, M.Z.) is more pronounced in the rural areas, where poverty is more acute and where the tradition of leaving children in the care of siblings or grandparents, or having children accompanying their mothers to the farms or other work places, still remains the dominant practice for early childhood care." (IMF 2009:33)

Critiques of informality take on larger implications when communities are under attack for the value they attach to education. This is true for education in general when the UNESCO (2011b:105) finds that the "tension between securing livelihoods and gaining education is a recurrent theme in pastoral areas." Yet, JICA (2011b:28) and ADB go slightly further:

> "There is a custom in the Sucos to spending a lot of money for ceremonies such as weddings and funerals by inviting huge number of relatives and neighbours. And a relatively large amount of time and money is said to be spent on these ceremonies and festivals. ADB suggests that a change in attitude and mentality toward spending on education and children's health instead of such ceremonies is also required."

At the same time, societies' are seen as sometimes appreciating the wrong education as LAS (2008:130) laments when stating that

> "Most of the problems of professional and technical education is the negative image that most societies give to this education considering it to be the track for the underachievers, those who have not acquired high academic skills that enable them to go to university."

As a response LAS (ibid.:37) proposes to “adopt an ‘overall change’ approach, to follow a long term future oriented vision to achieve the social engineering needed to draw the picture of what society may be like in the future [...].”

In Ghana, the IMF (2012b.15) sweepingly bemoans that

> “The nation’s efforts and aspirations are also challenged by prevalent socio-cultural dynamics including public morality, attitudes, behaviours, conduct, responsiveness, time-consciousness, among others, that weaken our capacity to achieve our development goals. As a nation, there is the need to introduce and promote certain core values that will help shape people’s thinking, behaviour and conduct for national development.”

One can see that organizations sometimes even feel urged to stress that the “cultures” they represent are not less able to develop than others:

> “It is worth reflecting that traditional Pacific cultures are resilient and value qualities of risk-taking, vision, determination, integrity, leadership and discipline. These align very positively to qualities of entrepreneurship. Culture can therefore be a powerful factor in promoting entrepreneurial development and should not be seen as an obstacle to it.” (PIF 2005:5)

> “Indigenous cultures were seen as important and it was noted that there is not necessarily a conflict of interest between Pacific cultural values and entrepreneurship. Our ancestors possessed qualities of leadership, vision, inspiration, risk-taking, discipline, dedication and commitment, all of which are basic pre-requisites for entrepreneurship.” (ibid.:9)

Even so, PIF (2007:18) feels that “attitudinal change and values training is also important to help individuals to succeed in the harsh competitive globalised Pacific.” Against such “values training”, it again seems peculiar that, two years later, PIF (2009:16) states that “The cultural values, identities, traditional knowledge and languages of Pacific peoples are recognised and protected (Pacific Plan Objective 11).”

Perhaps the ultimate reason for such feelings is that “The long-term measure of success for developing countries will be the degree to which a system and culture of lifelong learning have been established” (WB 1999:7).

Besides general criticism, numerous organizations stress the particular disparity between boys and girls. UNESCO (2011b:105) sees that “Cultural attitudes and practices that promote early marriage, enforce seclusion of young girls or attach more value to boys’ education can form a powerful set of barriers to gender parity.” Similarly, EuropeAid (2006:18) mentions “Cultural reasons: Local beliefs, cultural practices and attitudes to gender roles" as key problems to be overcome to raise enrollment. USAID (2005:5) can confirm this for South Asia, sub-Saharan Africa and parts of the Middle East, where "Other obstacles include male-based curricula, cultural prejudices regarding the value of educating girls, and resistance to coeducation, especially after puberty." This is also noticed by JICA (2011b:7) for adult women in Indonesia, where "As the husband's family pays a dowry to his wife's family upon marriage, the husband tends to view his wife as purchased property." As a consequence, "they have only limited education and are engaged in farm work" (ibid.).

A similar problem might exist in Vietnam:

> "However, the patriarchal system took root in the country due to the long rule by China, the permeation of Confucianism and French colonization, and remains strongly entrenched. According to the teachings of Confucianism, women's obligations are to give birth and care for children and to engage in domestic work in order to maintain family cohesion." (JICA 2011c:7 Vietnam)

In the same vein, marriage practices with great age differences become "sugar daddy syndromes" and certain child-rearing practices are criticized for bringing up "nonassertive girls" (WB 2003b:20-21). Europe Aid (2010a:37):

> "Moreover, cultural barriers with regard to the role of women in society require a mind-set transformation, certainly in traditional segments of society. Especially in poor countries, prejudice against female teachers is a major obstruction, with male teachers seeking to maintain their dominance of the profession, particularly in rural areas."

In Article 20 of its Charter on "Youth and Culture" AU (2006:15) declares that

> "1. States Parties shall take the following steps to promote and protect the morals and traditional values recognised by the community:
> a) Eliminate all traditional practices that undermine the physical integrity and dignity of women; [...]".

And UNESCO (2010a:178):

> "Early marriage for girls is another barrier to education in some pastoralist communities. So is a deeply engrained belief that female education may be of less value. A proverb of the Gabra community in northern Kenya says: 'God first, then man, then camel, and lastly girl.' This explains a reluctance to sell camels to finance girls' education, unlike for boys (Ruto et al., 2009, p. 11). The social attitudes behind such sentiments are deeply damaging for girls' education."

In this sense, education makes a difference; in Bolivia, for instance:

> "In the Plurinational State of Bolivia, Colombia, the Dominican Republic, Haiti, Nicaragua and Peru, teenage mothers have an average of 1.8 to 2.8 fewer years of education than other girls and are fourteen times as likely to drop out of school. […]

> Education itself is good protection against early marriage for teenage girls." (UNESCO 2012: 235f.)

Organizations re-define economies, societies, families, the role of mothers and sometimes also teachers:

> "Creating this new environment requires a change of culture, especially where teachers' status in the classroom and society arises from being perceived as an authority figure;" (WB 2003b:34)

Against the backdrop of such strong judgment, the occasional reference to the "Asian philosophy of lifelong learning" or the "Islamic vision of development" becomes a shallow label or a narrative device (see below) once they are investigated more closely, be it in terms of their goals or curricular and policy recommendations. They are – to use neoinstitutionalist vocabulary - "contextual variations" in an otherwise widely shared "dominant belief system" reigning in the organizational field. Even more, organizations advancing these cultural factors insist on presenting their culture as especially favorable to harness the LLL potential. Here, LLL becomes easily

> "supported by values and beliefs regarding the importance of human development in our Arab Islamic heritage, the importance of the search for knowledge from the cradle to the tomb, and the necessity to give priority to investment in knowledge capital in order to support the overall vision of the development of Arab society and to prepare it for the reality of the twenty-first century." (LAS 2008:25)

However, in order to unlock the LLL potential in the "Arab Islamic heritage", those traditions which are not legitimated by world cultural imperatives are to be jettisoned:

> "Culture, tradition and narrow interpretations of religion are the primary impediment to the emancipation and empowerment of the Sisters. Until the relevant Member Countries and communities fully unlock the vast potential that is in half of their population, their human capital will remain seriously deficient." (IDB 2006a:41)

Similarly, the occasional, but always unspecified, reference to a curriculum paying heed to "Local knowledge", "indigenous languages and knowledge systems" or "ethnoeducación" (UNICEF 2000:30; 2012:3; AU 2006:8; OAS 2001:36) does not change the fact that organizations would like to see their societies leapfrog into modernity. And it seems that those organizations covering those countries furthest away from this goal are the most fervent advocates. In general, states are called upon to "promote lifelong learning for all indigenous people" (OAS 2001:36) or, in Colombia, for instance, "to provide information on the impact of each of the measures adopted in terms of improving access of Afro-Colombians and indigenous peoples to the education system (ILO 2013:443). Even the EFA World Declaration is festive on the issue:

> "Recognizing that traditional knowledge and indigenous cultural heritage have a value and validity in their own right and a capacity to both define and promote development [...];" (UNESCO 2000:74)

What exactly the role of indigenous knowledge in the curriculum is, remains unclear. Perhaps, culture gets its place in the curriculum as "traditional handicraft" (EuropeAid 2010c:7) or as ASEAN's (2009:88) plea to "Preserve and develop the traditional handicraft villages".

The overt tone LLL manifestos strike upon encountering alternatives in less industrialized countries does not mean there is no conflict in the context of those areas already believed to be modern. Just as for other themes in LLL theorization, the difference is one of degree, not of kind. In this sense, where traditions have disappeared (or are no longer perceived as such) and would not count as an impediment in achieving LLL goals, the cultural argument often turns into one about attitude and habits. The EU proposes creating a "learning culture and learning-for-all culture" through

> "Promoting more positive perceptions of learning and raising awareness of any entitlements and the benefits of learning, e.g. through media campaigns, from the earliest age – at pre-school, school, and higher education levels, as well as in youth organisations and among the adult population;" (2001:13)

In the same document, the EU declares that "people need to want and to be able to take their lives into their own hands – to become, in short, active citizens." (ibid.). Four years later, among the "main challenges and barriers to lifelong learning" is still the fact that "traditional cultures (are, M.Z.) reluctant to shift" (EU 2005:31).

We already saw that the OECD (1996:92f.) speaks of structural or contextual barriers to LLL in guise of "values, belief systems, habits and traditions that constitute the very fabric of OECD societies" and individual barriers in the guise of "dispositions, values and attitudes of individuals" which are all within the "realm of legitimate policy intervention." It becomes therefore imperative to instill people with the "intrinsic (instead of instrumental) value of education and learning" (OECD1996:89).

Another example of such efforts to re-define problems can be found, not only with regard to communities and types of learners, but also the education system in general:

> "Traditional policies and institutions are increasingly ill-equipped to empower citizens for actively dealing with the consequences of globalisation, demographic change, digital technology and environmental damage." (EU 2001:3)

In the same vein, the most elaborated proposal to contrast stylized types of a traditional educational system with a more modern LLL has been made by the WB (2003b). Taking this prototypical comparison at face value, the implications are enormous. Education systems have to overhaul their teacher training, their teaching methods, and their technical equipment. They have to come up with new flexible solutions to individual learning routes. Learners are conceived of as the main anchor of this new system. They are to be empowered through competencies and they "drive" this new system, assuming that they know what they want to learn and need to learn (often not the same).

Table 5.5: Scope, Content, and Delivery of Education and Training in Traditional and Lifelong Learning Models (WB 2003b:58)

Dimension	**Traditional model**	**Lifelong learning model**
Scope	Formal schooling from primary to higher education	Learning throughout the lifecycle – in schools, on the job, after retirement
Content	Acquisition and repetition of knowledge	Creation, acquisition, and application of knowledge
	Curriculum driven	Diverse sources of knowledge
		Empowerment of learners
		Competency driven
Delivery	Limited learning options and modalities	Multitude of learning options, settings, and modalities
	Formal institutions	New pedagogical approaches
	Uniform centralized control	Technology-supported delivery
	Supply driven	Pluralistic, flexible decentralized system
		Learner driven

LLL and the problem of how to frame a narrative

The finding that LLL is supported by a culture-ideological character is further backed by the use of specific stylistic elements. Indeed, we can see that education and LLL are *written into* larger narratives of *history* and *identity*.

Lifelong learning and history

I noted a peculiar tension between the emphases on LLL as a part of the human condition that has always existed on the one hand and the novel character that is, nonetheless, put at the center of organizations' arguments on the other.

The novel character is underwritten by a dramatic emphasis on the historical "dynamics of the 21st century when the concept of lifelong learning will under pin (sic) all education and training" (PIF (2010:7). With astonishing unanimity organizations focus on the fact that "The 21st century brought with it new educational mandates on a global scale [...]" (APEC 2004:1). Before the beginning of the century, UNESCO (1996:12) had already warned:

> "At the dawn of a new century the prospect of which evokes both anguish and hope, it is essential that all people with a sense of responsibility turn their attention to both the aims and the means of education."

Organizations usually stress other socioeconomic, cultural and demographic factors turning LLL into a "necessity" (IADB 2011:1), an "inevitability" (BIAC 2003:2; OECD 2008:1) and, sometimes, even a "survival issue" (UNESCO 1994:7; ILO 200a:1). For the WB (2003b:71), this new economy is already in place:

> "But, in the global knowledge economy, access to continuing education and training-that is, to lifelong learning-is a necessity for people who want to have high valued-added and secure well-paid jobs."

In a similar line, again UNESCO (2007a:46):

> "In the 21st century, socio-economic forces push the lifelong learning approach. The changing nature of work as a result of globalization and technological change emphasize the need for continual upgrade and change of life skills throughout life."

As well as labor representatives:

> "Lifelong learning is important for all workers – blue and white collar workers alike. All workers in one way or the other are faced with the necessity to adapt to the changing world of work and build on their actual level of skill and knowledge." (IMWF 2006:1)

> "Lifelong learning is now commonly accepted as being a key economic necessity in the development of workforce knowledge and skills in response to a changing labour market." (ILO 2003:1)

Even organizations that have little to say in general, as measured by their contribution to the pool of documents, are convinced that something ground-breaking is taking place:

> "Consider the necessity of constant modernizing of technical and vocational education and training to keep up with the rapid changes brought about by globalization and technology and strengthen the cooperation in this field among BSEC Member States […]." (BSEC 2007:1)

> "In 21st century education, e-learning (education through digital media) has given rise to personalized learning environments (PLE). This is a response to the necessity of lifelong learning, as well as to the challenge of responding to youth that have dropped out of the educational system and face difficulties in their school life." (IADB 2011:1)

What is conceptually disturbing, is the fact that, in these fatalist evocations, LLL is simultaneously the trigger (that brings about the knowledge economy) and the reaction (meeting the needs of an already existing knowledge economy). For LAS (2008:61), LLL is a means to bring about this kind of economy:

> "[...] to move to the reality of the knowledge based economy and the subsequent necessity of betting on human capital, [means; M.Z.] following the lifelong learning approach, and believing in bringing about the 'learning society'." (LAS 2008:61)

The EU is particularly divided over what comes first. In 1993, the EU (1993:63) believed that

> "More must be done to ensure the efficient operation of the single market, notably by streamlining and rationalizing rules and regulations so as to make easier to establish new forms of labour organization and to move away from Taylorism."

Seven years later the "move away" has become accomplished and transformed into the new reality: "[...] above all, education and training systems must adapt to the new realities of the 21st century" (EU 2000:6).

Occasionally, even the explicit use of history science helps to create a narrative; here, again in the EU context:

> "Yet this age of change is a historical opportunity for Europe, because such periods in which one society gives birth to the next are the only ones conducive to radical reform without violent change. The increase in trade across the world, scientific discoveries, new technologies, in fact open up new potential for development and progress. An eminent European historian, co-director of the "Annales" and well-placed to compare this period of change with those that preceded it, particularly the transition from the Middle Ages to the Renaissance, said:
>
> *The Europe of the Middle Ages and post-medieval times had to face up to the Byzantine world, the Arab world and the Ottoman Empire. The struggle today is fortunately set in a more pacific context. Nevertheless, the existence of protagonists in history gigantic by their size or by their economic strength, or indeed both, means Europe has to achieve a comparable scale if it is to exist, progress and retain its identity. Facing up to America, Japan and soon China, Europe must have the economic, demographic and political mass capable of securing its independence. Fortunately, Europe has the weight of its civilisation and its common heritage behind it. Over 25 centuries European civilisation has, in successive stages, been creative; and even today, as one slogan goes, Europe's main raw material is unquestionably its grey matter.*
>
> […]." (EU 1995a:53)

If we take this dramatic scenario seriously, we also have to ask what happens if countries and learners "miss the LLL train". Not only do educational and other divides deepen within and between countries, consequences might become much graver:

> "Mankind will not survive its food, economic and ecological crises, nor the impact of its inevitable cultural multiplicity, unless all of the world's citizens have the space and resources to learn new ways of producing and living together. And this sustained growth in productivity through the continuous renewal of knowledge and skills is also what we call adult education." (UNESCO 2009:81)

Lifelong learning and identity

Finally, I would like to make clear how LLL is used to create *identity*. In line with the universalistic assumptions inherent in LLL and the strong value attached to equality among individuals, the remaining boundaries of identity generation would ultimately be located in individual psyche (inner boundaries) and the world or cosmos (outer boundaries). The inner boundaries have been described in the previous section as the LLL personality. The outer boundaries might be drawn by stressing “education for global citizenship” (UNESCO 2011a:23) and the ability “to exercise their duties in democratic and pluralistic societies that extend across the various borders of the traditional nation-state” (OECD 1996:99).

It is this cognitive map across which learners are roaming in LLL theorizations. And it should not be surprising that, for organizations that are by definition *international*, there is no reason to stress national concerns in educational matters. Yet, upon closer examination, we might add two more identity layers, one organizational and another supranational or regional.
First, while most organizations use LLL to reinvent educational systems or the learner role, occasionally they also explicitly use it to reinvent themselves, adding new substance to their work. This is exemplary in the case of trade unions

> “[...] ‘traditional’ bargaining issues, such as wages and working times, the IMF has been actively promoting the inclusion of other issues that are appropriate to working life in the 21st Century. Lifelong learning, for example, is an issue that takes on special dimension among white-collar workers who see it as a key element of their professional career. Trade unions have always emphasized the value of education and training in the past and fought hard for quality education and training systems, but the quickening pace of technological and economic change has added a new dimension to this topic and made it a priority for many unions throughout the world. The right to lifelong learning must be reinforced through statutory means and/or collective bargaining, and pressure must be put on employers and lawmakers to build in these guarantees.” (IMWF 2009b:44)

Much more often, however, emerging regional formations use education and LLL as an identity bracket. The regional framing of plot elements usually takes the form of common changes, challenges and chances. The educational theorists make no reference to the role education has to play in the formation of national identity. When they do so, it is always coupled with the larger Asian, African, Arab or European dimension. Regional actors from all areas use education (and sometimes explicitly LLL) as a vehicle to transport a supranational/ regional identity. This is done in two ways: either they want curricular subjects to put more weight on regional scope (in social studies, geography and history, for instance) – as proposed by the EU (2005:58), for example, where countries are asked “to encourage a European dimension in the curriculum” – or they use LLL as a broader narrative to continue the writing of history as a regional one. The latter is evident in the case of ASEAN (2011:2f.):

> “In this globalised, fast-changing world, continuous learning allows people to be self-sufficient and adaptable to changes in society. Building a harmonious ASEAN Community requires all citizens of ASEAN countries to be lifelong learners, and all agencies to become providers of lifelong learning opportunities. By adopting lifelong learning for all as a master concept for education and training, first-class national education systems can be planned, expanded and transformed to cater to people’s learning and development needs […].”

The ASEAN slogan "One Vision, One Identity, One Community”, visible on all cover pages, is also a telling example. APEC, another Asian representative, strikes a more philosophical tone:

> “But, the Asians see lifelong learning leading to a high vision of a ideal society. Confucius talked about a “Da Tong” society, in which equality, honesty and peace permeates, in which all people love each other, there is no theft and burglary, doors can be left open without any fears. Lifelong learning leading to a vision is embedded in the Asians’ hearts and mind.
>
> The crux of the matter with lifelong learning is the awareness and willingness of individuals and the community to go in this direction, which promises much adornment for the future. Hence all efforts should be channeled to this end. The Asians call this spirituality of the mind.” (APEC 2004:12f.)

Besides Asian perspectives, there are also pan-African pleas where education serves “The preservation and strengthening of positive African morals, traditional values and cultures and the development of national and African identity and pride [...]” (AU 2006:8). In the Andean region education is equally considered to “strengthen the Andean identity among all citizens (fortalecer la identidad andina entre todos los ciudadanos; translation M.Z., CAN 2003:11f.). And the “application of the Inter-American Democratic Charter, which constitutes an element of regional identity [...]” (OAS 2012:36) can be interpreted similarly.

The same outcome can be confirmed for the Caribbean organizations:

> “There is an identified need for the development of comprehensive National Training Policies to reflect a national identity but within the regionally established framework.” (CARICOM 2009:13)

> “OECS Education Reform Unit (OERU) aims at instances in which the explicit or implicit goals are to foster regional integration, promote regional collaboration, build

> regional identity or establish common regional standards or some combination of these." (OECS 2001:14)

Furthermore, the IDB (2006a) wrote its Visions for Development explicitly for the *Ummah* and LAS advocates "Enhancing the role of the educational system in deepening national and Arab culture and increasing awareness of the major Arab issues" (LAS 2008:40).

Despite these overt regionalist statements it would be wrong to interpret them as evidences of an emerging (educational) supranationalism. With the exception of ASEAN, all other organizations described above directly or indirectly add wider global identity frames to their regional layer.

The AU (2006:5) stresses that

> "Every young person shall have the right to social, economic, political and cultural development with due regard to their freedom and identity and in equal enjoyment of the common heritage of mankind."

In the Americas, CAN (2003:11), in its charta on *Educación, Ciencia y Cultura*, not only promotes regional pride, but also "global awareness of peace" and "intercultural cooperation" in all Andean countries (en todos los países andinos una conciencia global de la paz, convivencia intercultural […]; translation M.Z.). An indirect global identity is promoted by OAS (2001:35), as it wants to strengthen human rights in its hemisphere.

The LAS (2008:40) equally ties together different layers of identity:

> "[...] the purpose being to strengthen the pan-Arab sense of belonging and feeling […] supporting national identity with universal identity in an interdependent world."

The EU is perhaps the strongest supporter of multiple identity layers, implying a gradual evolution in the process of identity formation:

> "It is closely related to democratic citizenship and the aim is to provide a smooth transition from local, regional and national frameworks to the European level, leading finally to a perception of being a world citizen." (EU 2005:57)

Such an evolution is only logical if it is considered that:

> "Countries and world regions may have differently balanced priorities in adult learning and education, but they are united in seeking to improve the quality of life and in the recognition that there is a global dimension to all the challenges we face in the coming decades." (EU 2009:48)

5.3 Conclusion

We can cautiously confirm most hypotheses laid out in 4.1.1. The organizational field, which is heterogeneous by type, staff, budget, publications, age and area, is, at the same time, united by a single common belief system made of notions of development, progress and growth (*H1.*). Caution is particularly imperative when looking at the expansion of the field. While overall expansion (foundations) is undoubtedly evident, increase in staff, budget and publications can only be corroborated for a small sub-sample. With regard to individual members, trade unions display no significant trend (*H2.1-H2.5*). It must again be emphasized that the absence of significant trends might substantially be explained by the lack of a sufficiently long time line (that is, number of observations).

Overwhelming support can be given to *H3.1* and *H3.2*, where the dynamic of the field has been measured as interest in educational matters in general and LLL in particular. Without exception, organizations mention education in their documents, and more than two thirds of IOs have begun to make references to LLL. The evolution of this diffusion across the sample is significant over the period analyzed. *H3.3* has produced an unexpected and interesting result. While the geographical location of organizations does not matter (neither in frequency of references nor time until reference), a specific type (universal membership IOs) accounts for slightly more references. More importantly, organizations that have been founded after the "invention" of LLL (post-1990) take less time to incorporate it into their portfolio.

Among the main results of the qualitative analysis is that all organizations promote a highly uniform model of LLL, which differs in degree of elaboration (or theorization), but not in kind (*RQ3*). In a minimalist variant of our LLL model, organizations refer at least to the main actor (the individual learner) and the alleged benefits she/ he might gain from it (*RQ 1* and *RQ 2*). That this individual learner is central has already found support in the literature. The fact, however, that the supposed model of LLL turns out to be a psychological prototype of the lifelong learner has not yet made its way into similar analyses, which often stress systemic reforms (*RQ 4*).

Finally, and largely an unexpected "by-product" of the GTM process, the model of the lifelong learner is embedded into and supported by a wider cultural ideology that rests on notions of rationality and universality, as well as on specific goals often associated with modernity (freedom and justice). It is on these instances that IOs turn into ideological theorists and open analytical avenues for rethinking conflict in education. Chapter 6 will discuss these findings and lay bare implications for further research.

6. Discussion

6.1 The educationalization of world polity

One of the key contributions of this work is to have shown the range of the organizational field of education. While highly heterogeneous in terms of size (from a budget of less than US$ 1 million to more than US$ 52 billion), type (more than seven different types), original mandate (from purely economic to purely educational), age (from more than 100 years to less than five), area (from Scandinavia to Oceania) and represented members (from wood workers to Sahel countries), organizations are unified by two distinct features: they are international, or at least internationally-oriented (as with development agencies), and they pursue similar goals (albeit often in the name of different members). These goals are overwhelmingly cast in terms of progress, development or growth and only rarely (in less than a fifth of the sample), in terms of education or more specific sector interventions such as vocational training, higher education or distance education on-line learning and so on.

At the same time, one of the main original assumptions of this work can be corroborated. All organizations – once founded – sooner or later direct themselves to educational matters. This is important for two reasons.

(1) The original assumption that the "big four" is a misleading avenue has been given strong support, in that we can now add another considerable number of "smaller" organizations. All 88 actors from the sample show themselves interested in education, 63 of them with an additional interest in LLL.

If we want to understand why and how policy ideas are carried to every corner of the globe, we may turn to the representations of these corners. Some of the regional actors in the sample (both political and financial institutions) play quantitatively and qualitatively important roles in diffusing and (albeit symbolically) contextualizing education and LLL.

The fact that regional organizations are those that have grown and keep growing, most importantly in numbers, as compared to universal membership organizations, might reflect increasing legitimacy of this type of organization worldwide. We, therefore, would need to analytically keep pace with these organizational changes when attempting to capture the complexity of international governance. This has already been done in social policy studies where the global or transnational welfare mix is now a well-established concept that does justice to globalization processes (Yeates 2008). What we have here are the outlines of a global educational mix, at least concerning the reference to and theorization of educational ideas. We know from Deacon (1995) about the "globalisation of social policy and the socialisation of global politics"[92], and we might now want to add similar tendencies of educationalization.

[92] The quote refers to the title of the article.

(2) If we leave the descriptive level, we may enter the theoretical discussion and ask why such large scale change in interest and mandate within and across organizations has occurred. Only by implication are *organizations* becoming "educationalized". What is actually changing is the *discourse on human development*. Education has become the single most appreciated approach to individual and social development. The wide commitment to LLL is only one (albeit telling) evidence for this, since the idea of LLL might be considered an extension, if not a radicalization, of education. This has come about, not because more is now *known* about the exact impact of education on individual and social development (from economic growth to happiness), but because it is *believed* that education actually has a tremendous impact on development and because education is *valued* as a human right.

The enormous legitimacy of education is strongly reflected in the dynamic of this field, where the vast majority do not mention education explicitly in their mission statement, but have come to be interested and active in education in a very short time span after foundation. The fact that IOs do not mention education in their statement is either explained through the assumption that education is already taken for granted (so there is no need to mention it) or, especially with regard to the older statements, education has only later come to be viewed so preciously. In both cases, the fact that IOs unanimously put educational planning on their agendas, lends much support to the hypothesis that there is a uniform external "stimulus".

More importantly, the analysis has shown that more recently founded IOs need significantly less time to discover and introduce LLL in their portfolio. We can cautiously conclude that more recent IOs readily draw on already available models of how "to do development" and how "to do education", i.e. to position themselves, to internally structure themselves and to write a "proper" policy or position paper. This is a finding that has been given a lot of attention in world polity theory (Meyer et al. 1997).[93]

More recent organizations do not need to (re)invent a model that is already out there enjoying profound legitimacy and that is elaborated at once sufficiently vaguely and concretely as to be embraced in any locale around the globe without losing its name. Vague enough to allow for symbolical contextual recalibration and concrete enough to determine its merits: individual and social development. The further we move away from the "big organizations" to the smaller ones, the more mimetic and ritual diffusion becomes.

[93] We can also recall the reference pattern in LLL documents (Section 4.4.3) indicating that the "big four" plus ILO are the most frequently mentioned IOs in all documents.

This view is different from the prevailing approaches in IR, where it is common sense to state that “[...] in any event, diffusion in the realm of strategically interactive human behavior hardly ever resembles ‘copy and paste’ ” (Solingen 2012:641). Mimesis, it seems, does not fit into the anthropology underlying rationalistic and functionalistic approaches to traveling policies. An anthropology that assumes the strategic and rational individual and that is, not without irony, at the core of the LLL model itself, as we will see in the next sections. Thus, when Parreira do Amaral (2011) speaks of an *international educational regime* or Mundy (2007) of *educational multilateralism*, they can not explain why it emerged in the first place and why so many diverse actors suddenly play some minor or major role in it. They and the derived concepts of policy learning and transfer (Section 2.3.1) take the functionalism involved for granted, just like conflict theoretical accounts and the derived concept of policy imposition take for granted that education is an arena in which actors fight for their dominance. However, as I demonstrated, the diffusion of LLL might well be marked by numerous contradictions of which organizations are increasingly aware, but is surprisingly free of the ideological cleavages that we know from other policy areas (such as social policy).

The degree of universalism outlined above urgently suggests questioning the functionalist argument. The most striking feature in the LLL process analyzed – the speed of its diffusion – is hard to explain by its functionality. The crucial questions are, 'how can the very same concept be as helpful for all countries alike, no matter how different they are?' and 'why do organizations that have almost no record in educational work so quickly incorporate a relatively novel concept such as LLL?' One straightforward answer might be that LLL has simply morphed into a trendy synonym for education. But that is only a superficial interpretation, since we can easily stretch the question about the functional relevance of LLL into a question about education in general. I argue that the uniformity and speed by which the LLL diffusion is characterized can only be explained through pointing to the high legitimacy the concept already possesses and the mimesis that follows from it.

Even more importantly, most accounts on diffusion assume that either policies or ideas flow. These foci are either too small (policies) or too opaque (ideas). I will point out below that what is required is a theorized model or blueprint ready-made for implementation backed by a cultural ideology. What further fuels this diffusion is a narrative framing. In this sense, LLL is a functionalist *narrative* as much as it is a functional *model*.

One might conclude that the governance mechanism within the field (and beyond: states) is diffusion itself. But this is only remarkable when we look at the content. What diffuses is the mechanism itself – theorization or rationalized planning of social life, in this case, education (and I am aware that this work further contributes to this process).

Until now, the diffusion of LLL has been discussed as a process in which the direction of the flows is left unmentioned. However, both the temporal diffusion pattern and the quantitative distribution of work on LLL among organizations suggest thinking of the diffusion as one that goes from the bigger organizations to the smaller ones, or, as we will see, in a not unproblematic hierarchical order, from the core to the peripheral areas. I would like to stress two more points here: (1) the boundaries of the field are highly fluid and (2) the internal structure of the field is not necessarily reflecting power relations.

(1) The organizational field is, at once, environment to other actors (nation states, above all) and itself embedded in a wider meaning and value system (culture) with which the boundaries are permeable (we might recall the Analytical Framework here). This neither means that any actor can enter the field, nor that actors in the field are not selective and wholeheartedly embracing for all cultural material they encounter. On the contrary, they take on only those ideas that are supported by world culture. They do not incorporate ideas that stress inequality, for example between men and women, urban and rural areas or between rich and poor countries. On the contrary, the disadvantaged in these examples should receive all the more attention.

Stressing wider cultural forces enables the approach used in this work to explain what other approaches cannot, specifically, the entry and exit of organizations. Inasmuch as understanding organizational fields means understanding cultural change, it becomes possible to see the composition and structure of the field as reflecting a hierarchy of cultural goods with development and education clearly at the top. Organizations enter the field by supporting this belief system and by making a promise to their members, which all provides them with legitimacy and helps them to identify fellow organizations with similar mandates. Critics might argue that it is precisely this the strategic behavior (the ceremonial promise) that turns the argument into a naïve view. At the same time, such a view allows us to understand why the promise is made in the first place and why it might eventually turn into an increase in isomorphic behavior, since pressure increases with each promise made (even if all actors are aware of the fact that it is highly unrealistic to ultimately keep such a promise). Organizations and their legitimacy could then be seen as a function of the goals they pursue and the scripts they enact. Their expansion only reflects the increasing value attached to these goals (see below).

(2) Another thought deals with the field's internal composition. It is common sense in much social science research, both on international relations and organizations studies, to conceive of some actors as more important than others. In a meso-sociological tradition, they have sometimes been called “policy entrepreneurs” (DiMaggio 1988) and, in IR scholarship, “norm entrepreneurs” (Finnemore's & Sikkink's 1998). I would argue that these arguments are problematic, since they imply a strategic actor that uses power to pursue goals and, as a consequence, they imply a hierarchy or stratification of more important and less important, more powerful and less powerful organizations that compete with each other. I want to explain why this perspective is misleading.

I would like to replace *power* by *authority* or *legitimacy*. This is not to deny that the World Bank has more resources (staff, budget, member countries and publications). It indeed has abundant resources, yet it also has the most daunting aspirations (world development). Instead of concluding that the World Bank has the authority it has because it is so resourceful, one might reverse the argument; in other words, it is as resourceful as it is because it has so much legitimacy, which, in turn, is derived from the goals it pursues. Meyer et al. (1997:167) pointed to this interplay between constructedness and constructing:

> “It is thus plausible to argue that dominant actors directly shape world culture. It is not plausible to argue, however, that institutionalization and change occur solely through the purposive action of constructed actors.”

Based on the quantitative and qualitative data, we can say that the educational field is vertically stratified in terms of budget, staff, members, publications, interest and activities in LLL and even with regard to the chronological order with which organizations appear on the LLL agenda. What is crucial here, however, is what we make of this stratification in terms of our diffusion analysis:

> “World-cultural forces for expansion and change are incorporated in people and organizations as constructed and legitimated actors filling roles as agents of great collective goods, universal laws, and broad meaning systems, even though the actors themselves interpret their action as self-interested rationality.” (Meyer et al. 1997:168)

In this sense, both WB and PIF, for example, are expected and entitled to work as agents for themselves, for other actors (states), for other non-agentic actors (the unorganized poor) and for the wider cultural principles (development in the widest sense). These wider cultural principles might not only help to explain why other politico-ideological cleavages disappear, but also explain the foundation of actors and the “allocation” of resources across the field and within each actor.

Closely related is the interpretation of another key finding from the statistical analysis, the expansive behavior of world polity. Ever more organizations of different types are founded, and, once founded, we can state that they experience significant growth over time. Such expansion might be explained by several reasons. Functionalist arguments might hold that more international problems require more international solutions, as in regime theory (Parreira do Amaral 2011). States, thus, consider IOs as the primary actors to solve these problems. This would, then, explain why IOs are founded, increasingly joined by new members and are growing in budget and personnel. Remarkably, IOs from the sample do not work on international (or transnational) problems proper. They work on education, which is, by IOs themselves, still regarded as a national affair. The strong role attached to the state through references of equality, quality assurance and guidance (Section 4.4.2) is a plea for more national control (albeit not in the Foucaultian sense) over education systems. Moreover, calls for more mobility, portability and transparency are goals that are to be achieved in the future by modifying education system and not a response to already-existing transnational problems.

Realist and Marxist accounts would see Great Powers behind such expansive waves whose interest it is to maximize their influence through IOs (Boswell & Chase-Dunn 2000). That these powerful states push for their (seemingly very diverse) goals in all 88 organizations is an interpretation that needs no further elaboration.

Constructionist arguments from IR scholarship have, in turn, stressed the bureaucratic character of IOs. As bureaucracies “by their nature, tend to expand”, such changes as we are witnessing in the sample would only be a “logical extension of the social constituency of bureaucracy” (Barnett & Finnemore 2004:43). We may indeed refer to the expansion of the field as the bureaucratization of development or progress, as the two latter notions are the unanimously shared goals of virtually all organizations. With this in mind, however, it becomes evident that any theoretical interpretation of such a growing bureaucratization cannot stop at the very level of analysis – the meso or organizational level – but has to turn to the wider cultural environment in which these organizations are embedded. It is somewhat tautological to explain the expansion of bureaucracies by their “nature”, since bureaucratization is a social process, which is itself part of wider rationalization turning the bureaucratic organization of societies into a preferred solution in the first place.

Furthermore, the activities in the field (theorization) indicate that we cannot talk about IOs as bureaucracies in the Weberian sense. What Barnett and Finnemore (2004), Jakobi (2009) and others have depicted as normative governance (classification, fixing of meaning, standard-setting, etc.), is not the primary result of substantial *bureaucratic* reflection on how to organize social life, but the product of a highly professionalized, scientized and organized social scientific personnel (both applied and more theoretical sciences) whose knowledge is channeled in discourses for which IOs might provide the bureaucratic structure or organizational forum and the paper on which the knowledge is eventually written. In the remaining two sections, we will see what it is that flows through these channels.

6.2 Rethinking international organizations and educational governance

6.2.1 Mechanism: diffusion by theorization and mimesis

It has been argued that the Council of Europe, UNESCO and OECD were “ahead of their time” when they proposed their educational concepts in the 1960s (Schuller, Schuetze & Istance 2002:8). The relatively modest interest in such ideas in the 1980s has further been interpreted as a “softening up” (Jakobi 2006) or a “warm-up” for the neoliberal 1990s (Lee, Thayer & Madyun 2008). What opened the window of opportunity in the 1990s was the coincidence of the perception of education as economically important, the parallel debate about the knowledge economy and the greater influence of IOs (Jakobi 2006).

However, we have to be careful. Every periodization of LLL implies that there are trends of quantitative or qualitative shifts in educational thinking and planning that could be *causually linked* to the idea of LLL, if the concept is not to be treated as an empty canvas on which we can project any idea that seems convenient.

All the more caution is appropriate if these shifts are looked for outside the circular logics of knowledge production and reproduction that mark academia and IOs (where we can, in fact, ascertain the quantitative shifts). For example, the quantitative changes have been defined as an increase in ECCE, HE enrollments and the implementation of adult education policies (see Sections 1.1 and 1.2). Such changes, however, are not new. World educational expansion in primary, secondary and higher education was most remarkable in the 30-40 years after WWII and has slowed down since (although is still far from stagnating) (Meyer et al. 1977; Meyer, Ramirez & Soysal 1992; Meyer & Schofer 2004). Both vocational and non-vocational adult education had a strong momentum in development cooperation in the 1960s (Chabbott 2003; AFDB 2007b). Based on the single most accepted paradigm of manpower planning in UNESCO, ILO, OECD and WB and informed by human capital assumptions, TVET (including senior secondary education and training) was *the* sector in educational lending until the 1980s (Heyneman 2005). In addition, national qualification frameworks started to spread before LLL entered the educational policy discourse (in the late 1980s and early 1990s) (Jakobi 2006).

A similar trend can be seen for pre-primary education. Eleven of the currently 30 countries with compulsory ECCE had passed their law before 1996 (UNESCO 2007b:130).[94] Total enrollment in pre-primary education increased in industrialized countries until the 1990s and dropped afterwards.[95] For less industrialized countries, enrollment steadily increased from roughly 14 million in the mid-1970s to 90 million in the mid-2000s. Compared by regions, the most significant enrollment boosts took place in OECD countries in the 1970s, in Latin America in the 1980s and in South and West Asia in the 1990s (UNESCO 2007b:134).

Thus, analyzing the period from 1990 to the 2000s shows positive trends in all those sub-sectors and policy fields, but is part of a much deeper and wider trend of educationalization. It might be intriguing to attach a novel and path-breaking quality to the concept. At the same time, this might obscure the more important large-scale, long-term development.

Is LLL, then, only reflecting what has already been happening for a long time? Is it simply giving these trends a name? A name that has already long been the “world-educational revolution” (Meyer et al. 1977) ? [96]

Partly yes, inasmuch as it is used as an indicator of *quantitative* shifts in education worldwide. Partly no, inasmuch as we interpret LLL as a window that allows insight into processes of theorization that extend well beyond the purely educational realm. Here, we touch upon the more *qualitative* changes.

The qualitative difference between earlier concepts and the current LLL idea is often associated with a shift “away from a rights-based discussion linked to personal fulfillment towards one of personal and collective economic prosperity” (Jakobi 2006:123). Other authors have expressed their opinion less implicitly, preferring more harsh terms such as *neoliberal* or *human capital*, where the concept becomes one that “erodes commitment, dedications, and coherent time, and is therefore socially empty” (Bernstein 2001:366; likewise Do Nóvoa & Dejong-Lambert 2003; Rivera 2009).

This work, instead, proposes to take all organizations' documents seriously, that is to say, not only to consider UNESCO's sudden use of the economics of education language, but also, for

[94] For five countries the year is unknown.
[95] Due to the development in post-Soviet countries.
[96] The quote refers to the title.

example, the WB and IMF's effort to reconcile economic, cultural and social goals. Just as in earlier models, LLL wants both and we have to remember the chronology of its appearance: the first to propose something similar to LLL was the CoE (permanent education) with a clear humanistic and post-WWII peace-building mission. Then the OECD stepped in and added a (and by no means purely) work-related version. This is the early history of the concept recounted in Section 1.3.1. The early 1990s then saw the rebirth of the idea, again, put forward in the context of other than economic imperatives, by UNESCO in its Education for All documents. Again, the OECD (plus the EU) followed in the mid-1990s in proposing a more employability-focused version for its member countries (not necessarily the whole globe). The concept might then have rebounded, with this new broader socioeconomic set of goals, into other organizations like the WB and ILO.

However, the right to education is still there (together with related notions of equality and citizenship) as an ample plea, policy-base and curriculum content. The fact that it is less important (quantitatively) might first be explained by the sub-sector we look at. The right to education in terms of basic education or primary education is on its way to achievement, at least formally, with regard to gross enrollment ratios. A plea for a right to exclusively publicly funded pre-primary education, senior secondary education, higher education or adult education and vocational training is not yet on the global agenda, but is on some national agendas, where it remains to be discussed if it is desirable at all.[97]

I want to stress that the right to education is today more accompanied by a high degree of theorization than it was in the 1960s and 1970s . The debate on LLL is now much more filled with scientific or at least – theorized – material than in the 1960s and 1970s when idealism was much more visible as such. While statements on LLL made by IOs in an earlier period were overly lofty (they still are), and policy recommendations often (theoretically) unfounded, pilot-like, incoherent or simply absent, most actors now make huge efforts to theorize every cause, goal, didactic approach or systemic reform. Today, arguments are embellished in social scientific rationality where education is not only believed to better

[97] Often neglected in the debate, in those countries where LLL is thought to have already been put in place (the much-celebrated LLL models in Scandinavia), LLL as adult education or TVET has already acquired the peculiar status of being simultaneously a right and an obligation as with compulsory primary education worldwide (a unique paradox among human rights and a telling evidence for education's strong ideological character). The LLL “winners” in Scandinavia, with their system of “flexicurity” are not only availing learners of great choice in learning opportunities, in case of joblessness public benefits, such as unemployment insurance, are made contingent on participating in further education. These active labor market policies are increasingly copied by other OECD countries and much criticized (Wilthagen & Tros 2004).

individual's and societies' situation, but is proven to do so. In this sense, what is needed is a clear means-ends relationship with education being the sole means and all other economic, social, psychological and ecological benefits defined as ends.

The theorization at work here can be seen in quantitative and qualitative terms and sheds light on the internal division of labor within the field. Quantitatively, one might compare the volume of references in earlier documents and current ones. The WB's latest World Development Report (2013) numbers 401 pages, with 45 pages of scientific references, whereas the first, published in 1978, had less than 125 pages and no scientific references. The 1972 UNESCO Faure report (300 pages) had not a single reference and *Learning: the Treasure Within* (1996) less than 50 pages, again without references. The first UNESCO EFA Global Monitoring Report started out, in 2002, with 310 pages (10 pages of references). It now (2012) counts 465 pages with 35 pages of references. Here, IOs come into play as epistemic actors, repositories and clearing houses that finance, produce, gather stock, filter, edit and publish scientific knowledge.[98]

At the same time, we see that the most important documents from less active IOs do not contain any references at all except for those to the other larger IOs: LAS (2008), in its 233 pages-long *Plan for the Development of Education in Arab States*, has not a single reference in it. The same is true of IDB's (2006a) *Vision for Human Dignity* and OECS's (2000) comprehensive *Education Planners Handbook* as well as PIF's (2009) *Pacific Education Development Framework* and all AU documents. Exactly the same situation can be found in the 128-page *Roadmap for an ASEAN Community* (2009).

Here, we speak about central documents and reports, not policy papers, conference minutes, press releases or website statements. This is not to say IOs in the periphery conceive of their documents without being in line with the most advanced research findings. On the contrary, the result of my study was the great similarity between all these documents. They simply take an intellectual shortcut, copying and pasting much of the legitimated and elaborated material already out there.

[98] Quantitatively, note that we can take the numbers of bibliographical pages from above to compare them with the older documents from UNESCO, CoE and OECD (Section 1.3.1). These latter make virtually no references at all. One might object that educational research at that time had not yet produced the body of findings it has produced since. One might counter this argument by pointing to the same underlying logic: 'why is so much research dedicated to the improvement of educational processes and the questions about the relation between socioeconomic progress and education?'

A simple key word search[99] based on all documents analyzed reveals the following pattern (Table 4.8).

Table 6.1: Reference patterns

Organizations	n of citations
OECD	2981 citations in 112 documents from 35 organizations
WB	2019 citations in 118 documents from 40 organizations
UNESCO	1307 citations in 105 documents from 40 organizations
ILO	1741 citations in 89 documents from 37 organizations
EU	502 citations in 71 documents from 33 organizations

There are no signs of compromise, avoidance, defiance or manipulation of LLL models. Organizations do not try to bargain, escape, dismiss, challenge or co-opt[100] the LLL idea and to propose their own, since there is no overt pressure that pushes actors (small and big ones alike) to such behavior.

At best, we can identify Scott's (1994) contextual variation. As we saw with the Islamic organizations, a more or less grey idea is given some local color without touching the core of the idea itself. On the contrary, while some elements of the own cultural context is suddenly questioned against the backdrop of LLL, the overall impression is given that Islamic culture perfectly fits into the LLL model.

In any case, some IOs (the bigger ones) serve as catalysts that spur reaction, i.e. diffusion. We have to turn here to the qualitative and epistemological characteristics of theorization processes to understand why the material *can* be copied and *can* flow across the field and the globe. As previously stated, theorization is at the same time the condition, mechanism and content of diffusion.

We can understand theorization by looking at its epistemological totality or inclusiveness. Treating LLL as an ideology not only requires showing how it pushes aside alternative non-modern accounts. Since the underlying belief is that LLL can help all countries, all systems and all individuals alike to become more modern, more developed, that is, more like some imaginary model country, we might recall the penetration of these actors across (1) geographical, (2) socioeconomic, (3) cultural and (4) temporal (with regard to life time and world history) borders.

[99] References from organizations to themselves are excluded.
[100] Or any other of the strategies and tactics proposed by Oliver (1991).

(1) LLL is geographically universal, i.e. global, in that all organizations emanating from all continents have picked up the idea and applied them within their area context.

This implies (2) that organizations representing countries varying 1 to 100 in economic, demographic, educational or other socioeconomic indicators, seem to believe that the concept is a viable means to solve problems quite similar to these represented by the indicators in which they differ. Put differently, the whole development continuum reflected in the UN Human Development Index, from bottom to the top, is treated with the same language and the same hope and proposes highly similar reforms.

(3) Neither is there any cultural pattern discernible. Language, religion, history – none of these aspects makes for a specific LLL concept. Where LLL is given some “cultural flavor”, culture becomes just the source as to why LLL is perfectly suitable to the Asian or the Muslim world and Confucian or Koranic imperatives are translated into a modern LLL imperative, while getting rid of the “wrong” traditions from that primordial culture (Section 4.4.3 and below).

(4) LLL might be called a concept of educational radicalization. The whole life-course – and, peculiarly enough, even before (“prenatal health”) and after (“in the Hereafter”) – becomes educationally-structured. The only danger in this educationalized life-course is the transition from one educational/ life phase to another. However, here “lifelong guidance” (EU 2007b:37) might help to build the “seamless education system” (CARICOM 2009:9). Moreover, temporal universality is also implied when LLL is narrated in terms of an anthropological continuity: learning has always happened (it is the human condition) and will determine our future.

As pointed out earlier in this work, researchers increasingly discover the “normative” role of IOs in steering discourse (Wiseman & Baker 2005). The “comparative turn” (Martens 2007:42) in international organizations like the OECD, for example, which have started to get more and more involved in national education planning, might have its part in this development. As a consequence, Power (2004:766) suggests that a “metrological mood” reigns in education policy-making.

However, much deeper processes are at work here. I would prefer to speak of epistemic governance that might be defined as the production, processing, diffusion and use of policy-relevant knowledge (Zapp 2013). Here, IOs, together with their scientific personnel, become epistemic actors (though beyond the sense Haas [1992] had in mind) and their action has as many normative consequences as it has cognitive ones. Their role as epistemic actors and as a bridge between science and policy-making has already been touched upon in the section on the ideological character of LLL and can only be tentatively outlined in more theoretical terms at this point using two examples of theorization techniques.

IOs universalize particularities and standardize local "policy vernaculars". They turn local practices into abstract educational models (the Swedish model) that become part of even more abstract models and theories of personal and social development (such as manpower planning theory and human capital theory). Sometimes these universal theories are coupled with more time-bound concepts, in our case LLL. The Swedish experience with *recurrent education* in the 1960s and 1970s inspired the OECD to launch an international campaign with the same name, while stripping off the Swedish context. With LLL being a more comprehensive model, original local roots multiply. Pre-primary education ideas from Sweden, inclusive primary education from Finland, the dual TVET sector from Germany and the higher education system from the USA; the epistemic mechanism of dis-embedding continues to be the same. After a while, the theorized model comes back as a "policy boomerang" to those countries from which it first emanated identifiying inefficient and unjust practices in any possible respect.

But IOs also employ the opposite and, often subsequent, logic. They particularize theories and models into seemingly local and contextual policies. Heyneman (2005) shows that, in the decades before the 1980s, the strong adherence to manpower planning ideas led to a very limited set of educational policy recommendations in IOs, above all in the WB. Here, the "practical", that is, vocational senior secondary education sector, was preferred over academic and basic education. With the increasing prominence of rates of return approaches in the 1980s, the Bank proposed a new "short education policy menu" (Heyneman 2005:37), including the shift of public expenditure away from TVET and higher education to academic and basic education, the increase of private costs for HE, the provision of loan schemes to facilitate access of individuals to the now more expensive HE sector. Numerous countries that were dependent on larger adjustment programs had to choose from this menu. Today, the menu has grown. LLL has amplified expectations for countries. This shows not only the winding and intricate development and social planning discourse in general, it also provides direct insight into processes of theorization and IOs' role as theorists. Note that, in any case, particularization has its limits, as we saw above. The menu might amplify with LLL, but the number of options remains limited.

Such epistemic governance largely explains why LLL can diffuse so rapidly. Theorization, as described above, greatly enhances diffusability and reproducibility by “exorcising” the local particularities and displaying the generalisms while still stressing the adjustability of the concept to specific contexts.

Universality and rationality as key features of theorization are, therefore, fundamentally involved in the “metrological mood” (Power 2004) that surrounds LLL. Equipped with professionalized personnel working in specialized units, organizations come up with definitions, benchmarks, best practices, indicators and all kinds of quality criteria in order to audit, measure, evaluate, compare and rank the performance of countries, schools and individuals. The entire debate about “quality education” can only be held if quality can be measured and Jakobi’s (2009) “standard-setting” becomes a successful mechanism only if compliance to standards can be made amenable to methodical control. The frequent complaints about the monitoring and evaluation procedures in less industrialized countries is part of the assumption that universalistic and rationalistic educational planning technologies are necessary to succeed in a complex world.

We know from Strang and Meyer (1993) that theorization works best if social units (organizations, states, economies, individuals or societies) are treated comparably although they might display a high degree of heterogeneity in the first place. If, over time, social units have become isomorphic, this might more reflect the outcome of a normative project than one of a positive cumulative scientific progress and an accurate observation. At the extreme, such post-hoc rationalization completely conceals its ideological origins (Fourcade 2006).

However, with LLL we are not at such an extreme. The absoluteness with which LLL is incorporated and promoted can only be explained, I argue, by drawing on the fact that education is both rationalized *and* “very highly institutionalized at a very general collective level”, as with (mass) education in general (Boli, Ramirez & Meyer 1985: 147). And this general collective level is a cultural one. And IOs themselves are sometimes aware of it:

> “There is broad agreement, backed by research findings, that education enhances people’s ability to make informed decisions, be better parents, sustain a livelihood, adopt new technologies, cope with shocks, and be responsible citizens and effective stewards of the natural environment.” (WB 2011b:11)

This “broad agreement” existed before research on education became so proliferated and continues to exist without research findings. It comes into play whenever research findings are ambiguous, mixed or simply absent.

Moreover, it is exactly this “broad agreement” that makes alternative views of education increasingly impossible, both among educational policy makers and academia. It makes it impossible, for instance, to not think that herding children in Ethiopia or Mongolia should have some form of modern standard education (UNESCO 2010a). Earlier waves of criticism that pointed to cultural imperialism or neo-colonialization in education (Carnoy 1974; Bochner 1979) and proposed more or less radical responses from (less radical) indigenization (Kumar 1979) to (more radical) deschooling (Illich 1971) have petered out.[101] Chabbott's (2003) observation of the lack of alternative discourses can be confirmed, yet her assertion about the contestedness of the universality of knowledge in the field has not become visible in the documents analyzed.

The “broad agreement” also makes it impossible to think that there is something called over-education, which is a case in point that deserves some remarks. Earlier debates in education warned that over-education, i.e. producing more training than is needed, might be inefficient (more recently Teichler 2002 from a liberal posture) or even destructive in that it causes anomie (Huntington 1968 from a conservative posture). In both cases, over-education was seen as the lack of effective state control (Collins 1979). In fact, states were worried about such developments and, in some cases, did react against higher education expansion.[102] Similar concerns could be observed in the development discourse in the 1950s and early 1960s when manpower planning and technical training were the overriding priorities in the educational aid sector (Chabbott 2003) and fears of “diploma disease” loomed (Dore 1976).

Today, this has changed. The old model of a closed national society has made way for a model of an open liberal national and increasingly de-nationalized society with strong emphases on human rights *and* human capital. In such a model, over-education cannot exist, as education is, by definition, progress; where the research findings suggest the contrary[103], the “broad agreement” steps in.

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[101] Fundamental critiques are indeed difficult to find. But see Leach and Little (1999) and Brock-Utne (2000).

[102] See Lenhardt (2002) on post-WWII Germany. The reaction was strongest in Communist countries for political reasons (fear of producing an elite) and educational reasons (producing skilled labor beyond requirements) (Ramirez 2002).

[103] It is beyond the purpose here to discuss at length the literature on the highly mixed evidence of the various alleged effects of education. From neoinstitutionalism, we know that enrollments in math and science might have some significant effects, overall tertiary expansion no, or sometimes even negative, effects (Benavot 1992; Chabbott & Ramirez 2000). Similar mixed accounts are reported for the effects of achievement on growth (Ramirez et al. 2006). The rates of return approach has seen similar criticism for neglecting screening and credentialing effects. Moreover, from cultural anthropology we have case studies that point to stigmatization of the educated from traditionally-socialized peers (Daun 2005) and the whole panoply of cultural dilemmas in education in the edition from Leach and Little (1999). Note that, even within the WB, criticism has had some attention: “The Task Force believes that traditional economic arguments are based on a limited understanding of what higher education institutions contribute. Rate of return studies treat educated people as valuable only

Finally, the universalism that reigns in the theorization of and in the agreement on LLL translates into a narrative scenario about the great transformations taking place worldwide, which sometimes remind of fin-de-siècle millennialistic visions about the human species, full of anticipations of future changes and fatefully-urgent measures. This has already been highlighted by constructionists from IR about the framing of debates "to fashion a shared understanding of the world" (Barnett & Finnemore 2004:33). That these narratives of LLL are genuinely global is a new phenomenon.[104] While early models of educational development stressed that societies at "different levels of development" should pursue different educational strategies,[105] LLL is now promoted in a similar theoretical language across the globe. It is the assumed universal anthropology that turns LLL into a one-size-fits all theory. This sheds light onto another important novelty, as compared to earlier versions.

At first sight, LLL and education are theorized as universally valid with regard to countries or societies or groups within societies at different socioeconomic or educational levels and with different cultural backgrounds. However, LLL does not necessarily speak to and about countries, particularly if we look at how little is said about precise policies to create an LLL system. I would argue, instead, that we have to take a theoretical detour around the idea of the individual in LLL documents and the "psychological mood" IOs are in, if we want to understand the unprecedented diffusion of the concept.

6.2.2 Substance: theorizing the individual

I will argue in this section that we can only understand the absoluteness and universality in IOs' statements if we depart from the individual as the primary entity in the model. We may recall what we know from the neoinstitutionalist discussion on diffusion:

> If theorization shapes diffusion, what flows is not a copy of some practice existing elsewhere. When theorists are the carriers of the practice or theorization itself is the

through their higher earnings and greater tax revenues extracted by society" (Task Force on Higher Education and Society 2000:39 cited in Heyman 2005:41).

[104] Perhaps it is, in this sense, also time to rethink categories about international organizations that seem to promote development for less industrialized countries and those that promote the same for industrialized countries (which might also require rethinking our understanding of the taxonomies into which the world(s) are put).

[105] See for example the synopsis in Section 1.3.2 from Chabbott (2003).

> diffusion mechanism, it is the theoretical model that is likely to flow." (Strang & Meyer 1993:493)

I will show in this section that in the case of LLL, we deal with two theoretical models of the same entity, the modern individual. One model comes from economics (often described as *homo economicus*), the other from education (sometimes referred to as *homo pedagogicus* or *homo educabilis*). LLL powerfully combines the educational and the economic universalism. One enforces an unconditional educational imperative on the human mind, the other departs from an axiomatic understanding of how this mind works: rationally, maximizing. We also know from cultural anthropology literature that both universalisms are Western ideologies backed by century-long efforts of theorization sharing similar epistemological features – Enlightenment roots with its built-in human rationality and universality. Together they amount to a powerful theorized anthropology that is not culture-free (and therefore not conflict-free) and that reveals some largely unnoticed qualities of IOs as theorists and socializers or, more broadly, epistemic actors.

More importantly, they do not describe real persons, but human action as agency and humans as actors. In this sense, the first consequence of theorization is not that people are expected to become successful lifelong learners or to accomplish any of the goals associated with LLL. The first consequence is that people are expected to become an actor. Only then do theories follow that define effective actorhood. We might recall the IMF (2006:108), for instance:

> "The concept of lifelong training implies that every employee becomes an actor in his training course, his professional career and his career development."

Analyzing the explosion of human rights instruments, Elliott (2007:353) speaks of the "triumph of the individual" or the "cult of the individual for a global society". While these legal instruments protect the status of the individual as an actor, LLL is, in this sense, its birth drama. Trapped in the dilemma between universalistic claims of equality and human rights on the one hand, and the complex realities in highly diverse adopting populations (areas, countries, organizations, cultures, systems etc.) on the other, the individual arises as the unquestionable pivot. Instead of contenting themselves with painting what the world should look like and how individuals should fit into this world, the point of departure is the individual psychology itself that is to be empowered to be able to create its own world.[106] The

[106] I would like to thank J. W. Meyer for this comment.

frequent references to empowerment *and* creativity are particularly noteworthy in this regard (Section 4.4.3).

It is remarkable that the documents analyzed – although they only span two decades – shed light on this process of the increasing importance attached to the individual. Historically, we might distinguish three phases of educational planning:

In the (1) phase, the *ritual* educational structuration of the life-course prevailed, indicated by the dominating (and still important) analysis of formal enrollment ratios and, implicitly, of educational status. What mattered here was to have a statistical data base that provided information on the number of people in certain educational categories, for example, the number of HE graduates worldwide.

A (2) phase is marked by a strong focus on *competences*. The 1990s saw the rise of a discussion on quality in education and on what people actually learn in school:

> "Research assessing the link between the quantity of education (in terms of enrollment or average years of schooling) and economic growth has been encouraging but somewhat mixed, […] perhaps because ultimately what matters for growth is not the years that students spend in school, but what they learn." (WB (2011b.12)

A direct outcome of this insight has been the strong emphasis on "quality education for all" (OAS 2005b:1 and many others). The increase in student achievement assessments is another attempt to create a statistical data base, this time, however, to provide information on the number of people with a certain degree of certain competences. Moreover, the subsequent debate on cross-curriculum competences which is so prominent in major IOs like UNESCO, OECD, WB and EU (Section 4.4.2), is another direct result of these insights and might already hint to third phase.

In such a (3) phase not only key competences matter, but also *psyche*:

> "A good part of the variation in achievement tests can be attributed to personality traits or social skills as well as to incentive systems. These personality traits and social skills are critical in predicting individuals' life outcomes, including educational attainment and earnings." (WB 2013:175)

If formal enrollment has no impact on socioeconomic development and if competences (which are assumed to have an impact) depend on individual personality, it is the latter that needs to be changed in order to finally turn education into the powerful tool it is believed to be. Clearly, if knowledge becomes the prime engine of economic and social progress, one might ask, 'What keeps this engine running?' 'Knowledge workers' is the answer. 'What makes them knowledge workers?' 'Education and learning' is the preferred candidate here.

Then, again, ‘What is a productive factor for education and learning?’ ‘Schools, their quality *and* students' cognitive-emotional capacities and attitudes.’

We saw that the recommended LLL competences enshrined in a new cross-curriculum include skills, attitudes, dispositions and values or, more generally, cognitive, emotional and psychosocial personality traits as reflected in SNV's (2007:13) definition of quality education and lifelong learning as:

> “inputs and delivery context needed to empower beneficiaries to acquire the required competency and skills in numeracy, literacy, problem-solving, analytical thinking and reasoning in order to function as physical, social, intellectual, moral or spiritual and emotional human beings.“

However, organizations go even further in building “an all-able personality” (LAS 2008:32). We may also again recall what has already been discussed as part of the ideological character (Section 4.4.3). The “values, belief systems, habits and traditions that constitute the very fabric of OECD societies” and the “dispositions, values and attitudes of individuals” are all within the “realm of legitimate policy intervention.” It would become therefore imperative to instill people with the “intrinsic (instead of instrumental) value of education and learning” (OECD1996:89-ff.). The “dispositions, values and attitudes of individuals” can be found again in what we already met when discussing the lifelong learner (4.4.2). In this new “psychological mood”, the individual themselves becomes a rationalized myth.[107]

What is remarkable is that, if we compare this with the standard model of the so-called homo economicus so prominently celebrated in any textbook[108]on neoclassical economics (including neoinstitutional economics), we find strong overlapping assumptions.
Here, we see the self-interested individual that acts problem-oriented, separates between (given and unchangeable) preferences and external restrictions, acts rationally (optimal decisions) and that is only understandable through methodological individualism .

Interestingly, two of the frequently mentioned characteristics of the lifelong learner represent the psychological boundaries of human rationality: lack of information-seeking and risk-aversion. They are to be overcome by the successful lifelong learner.

[107] One might also question if goals of achievement and cross-curriculum competences can be reconciled in the end (Münch 2010).
[108] See Kirchgässner (1991); Becker (1996); Göbel (2002).

However, the pessimistic view of the human nature that usually underpins the model of the homo economicus (egoistic, opportunistic, short-term oriented and lazy) is replaced by the optimistic anthropology from education, where people are grateful to live in a world where one now gets a "second or third chance, satisfying their desire for knowledge and beauty or their desire to surpass themselves" (UNESCO 1996:111).

From this perspective, we can better understand why suddenly everything becomes a choice and a decision to be made rationally and informed: a decision between expensive marriage and funerals and paying for children's education and health (JICA 2011b:28), between informal care arrangements and formal ECCE (UNESCO 2007b:121), between farm work and attending class, between getting married early and staying single until education has been completed (JICA 2011b:14), between securing livelihood and gaining education in pastoral areas (UNESCO 2010a:178), between family care and further education (OECD 2003b:122ff.; 2004c:44) and so on.

Moving towards either of these options is, then, only a matter of incentives. To be sure, although economics provides more of a general methodology and theory to anticipate the right and rational option for people, with LLL the same option is anticipated in education and economics alike. This should not be confused with a process of disabling, disempowerment or even infantilization by professions, as in earlier critiques (Illich et al. 1977), but rather as a process of construction and re-construction of individualism itself. Such insight is not new, although until now it has not always been noticed or accepted. Meyer (1986:208) noted that

> "individualism is a highly institutional, historical construction; it is not centrally the product of human persons organizing their experience for themselves, but of various bodies of professional officials – religious ideologues, their secular counterparts (e.g. psychologists, teachers, lawyers, and administrators) – and by other institutions of the modern state."

It is remarkable and should interest educationalists that economists are joining this already large group.[109] This might certainly be interpreted as the economization of education and educational planning and is different from what many authors have criticized as neoliberalization, marketization or commodification (Chapter 1.1.1 and 1.3.3). However, it

[109] Along with all the other "enablers": IOs, states, schools, parents and employers all are organized in a system of "lifelong guidance" (EU 2007b:37) where they to help to turn the traditional learner, non-learner or not-yet learner into the lifelong learner.

might as well be interpreted as the educationalization or pedagogization of economics. [110] It also points to the fact that IOs themselves are highly constructed and scripted in their behavior picking only those models that are legitimated in the rationalized, scientized and theorized environment in which they act.

What is more important in this context, though, is to see *via* the model of the homo economicus to what degree the individual is decontextualized, seemingly disembedded from culture, history, language, traditions, religion, nations and citizenship, tribe, clan, community, family, sexuality, taste, etc. This theoretical model might, as such, do no harm, but once it becomes the anthropological blueprint for educational (or development) thinking and planning, it becomes all the more problematic as it is (against the widely held belief in economics) itself a cultural artifact. I want to emphasize this latter point in more detail.

Only marginally, scholarship has critically pointed to the problematic self-acclaimed scientific status of economics, mostly from cultural anthropology. While rare early critical contributions understood the discipline of economics as only amenable to the study of societies where the economy is not embedded in cultural and social life (modern societies as opposed to traditional or premodern ones; see Polanyi 2001), in more recent accounts neoclassical economics becomes itself a cultural artifact, where the distinction between economics and culture is seen as analytically false. Economics, here, has become "an unselfconscious victim of its own narrow discourse" (Friedland & Robertson 1990:38) and for Gudeman 1986:154) "any set of economic constructions is a kind of mystification or ideology".

Economic epistemology becomes particularly interesting in this context in its micro-economic assumptions[111] of the individual.

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[110] Note that the twelve purely economic organizations (WB, IMF, WTO, IADB, IDB, ADB, AFDB, BusinessEurope, ERT, BIAC, UEAPME, ICC) account for 26% of the educational documents (324,329 of 933,966) and 15% of the published material on LLL (4,722 of 27,720).

[111] On the macroeconomic side similar universalistic claims were made. The 1940s and 1950s were the time when scientific contributions to questions of international development and economic growth in a global context were first made. Classical economists such as Paul N. Rosenstein-Rodan wrote about "The International Development of Economically Backward Areas" (1944) or Ragnar Nurkse who discussed "Problems of Capital Formation in Underdeveloped Countries" as early as 1953. W. Arthur Lewis (1955) proposed a "Theory of Economic Growth", while Walt Rostow (1960) sketched out the "Stages of Economic Growth". Those optimistic, mathematically-tailored and seemingly timeless works were often devised in analogy to Western development paths and stated that less industrialized countries needed only a "big push" (Rosenstein-Rodan) in order to enable a "take-off" (Rostow) to eventually escape from the "vicious circle of poverty" (Nurkse). Those

> "Orthodox economists deploy a quite particular philosophical anthropology: rational economic man is deployed as the route to rendering coherent states of persons whose behavior is then amenable to scientific treatment and evaluation via the notion of efficiency. This model presents humankind as centrally rational and calculative, and thereafter to be understood only in less reliable or subjective ways." (Preston 1992:65)

Here, the rational economic man is as much heir to Enlightenment as is the educated man. Only by understanding the anthropology inherent in economics, can we comprehend why IOs scan speak of "personal development accounts" (WB 2003b:96). Systematically out of scope here remains the historical and anthropological literature on the concept of the *person*, which is constructed differently in different cultures and at different times.[112] The lifelong learner, however, is universal and – it seems – beyond culture, or not cultural anymore. As we saw, culture, in these LLL documents, has a peculiar character. That is not to say that traditions themselves are completely defied, but they need to be cleansed. Everything that hinders "Lifelong learning for All" is under scrutiny and has to be washed out (different gender roles in child-rearing, expensive wedding arrangements, castes, etc) keeping only what is perceived as favorable, putting that into "ethnoeducación" (UNICEF 2000:30; 2012:3; AU 2006:8; OAS 2001:36).

Eventually, this translates into an internal conflict within world culture. Inasmuch as diversity and tolerance is formally celebrated, yet social reality is discarded from the cultural landscape as undesired, international organizations reveal themselves as highly institutionalized world cultural ideologues.

If we locate the conflict in a cleavage between the modern and the traditional (including the richest countries here) we also depict the inherent mismatch between reality and principle. As soon as traditional societies are replaced by those modern ones that still lack the LLL attitude, we see that the conflict is even deeper than between different cultural and social orders, and ultimately between what is believed people should and can be and do and what they actually are and do. Seen from a macrophenomenological perspective, it is the conflict between the model society and the society as it is. The fact that teleology is a constitutive feature of

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theories of modernization reigned over the international development discourse throughout the 1950s and 1960s and have not been without consequences for efforts in educational development planning until today.

[112] Carrithers, Collins & Lukes (1985); Dumont (1985); Meyer (1986, 1986a, 1988, 1992).

modernity makes it unlikely that such mismatches and the related outrage, discontent and constant reform effort in politics, academia and civil society will cease to exist (I do not say they should). In the LLL world, in other words, a more and more educated world, educational (and other) inequalities become increasingly visible and perceived as injustices, and cultural differences become increasingly visible and perceived as violations of common norms. Finally, over-education on the one hand or limited educational aspirations on the other, become unthinkable, both in countries with three quarters of a cohort obtaining a university degree and in those where three quarters roam on fields watching their herds. One can either call all this progress or the dismantling of traditions.

The weapons fought with in this fight are the culturally backed definitions, theories and self-consciousness of a macro-situation, not military occupation, conditional loans and trade privileges. Our actors are modernizer, purifiers and missionaries rather than conquistadores. And they are as much cultural engineers as they are themselves products of a specific cultural arrangement.

Constructionist IR research focused on IOs as “teachers of norms”, telling states how to behave on the international stage by providing codes of conduct and establishing logics of appropriateness (Finnemore 1993) and comparative educationalists are interested in such governance activities as funding, ownership, provision and regulation (Dale 2005; see Section 1.3.2). This is still observable in LLL documents where states are called on to restructure their education systems with regard to curriculum reform, teacher training reforms, pedagogical reforms, legitimate educational goals and the duration of educational level or by describing how a system of “lifelong guidance” is to be established.

As shown above, the remarkable feature in the educational discourse on LLL is, however, that organizations depart from the individual rather than the systemic changes that have to occur if LLL is to become a reality. This should interest educationists and sociologists alike.
Beyond indirect structuration of states' functions (and which should not be confused with *control* as in neo-Foucaultian or neo-Marxist approaches), IOs work directly on the individual mindset, turning LLL from a manifesto of the individual into a toolkit for the modern individual, leaving the (normative) policy level and entering a more (equally normative) anthropological discussion. Here, LLL is not only turning the life-course into an ever-more “orderly project” (Meyer 1986a:200), “learning to be” (UNESCO 1972 and 1996:21) becomes the central notion. While, for most educationists, this might be the final and

victorious cry after a long battle, it becomes an analytically problematic statement in the context of this work.

Here, LLL displays the idealized and theorized psychogram of a learner that includes what people should know, be able to do, to think, to feel, to have opinion on, in short, to be like. Here, individuals become the single-most legitimated actors of the new “culture of lifelong learning”. The theorization of the individual exceeds by far any contribution to other actors, be it the state, the teacher or any other actor involved and becomes, therefore, ontological, in that it attaches meaning and value to the individual. The shift away from structural problems to cultural and psychological ones implies efforts to socialize or acculturate or assimilate people into modernity by institutionalizing LLL at the individual level. It needs little explanation to claim that this “imagined individual”, whose idealized and idolized imagery is provided by IOs, holds much potential for decoupling between what people are expected to do and what they actually can do (and want to do): reflecting on timing, duration, medium, setting, content, purpose and outcome of learning. Only very rarely, are the future lifelong learners asked what they themselves want and/ or are given voice:

> In rural areas, women face difficulties in traveling for farm work and other jobs outside their villages because of traditional cultural and gender norms. In a semi-urban area outside Cuzco, in Peru, large numbers of women are now engaged in home-based handicrafts, sewing, and diverse agricultural activities. Outside the home, they take up farm jobs, run their own small shops or restaurants, or work for hire in these places.
>
> The women explained, however, that they consider home-based activities (such as raising livestock) to be better jobs than jobs outside the home, because “it’s peaceful work, and we can look after the kids.” (WB 2013:54)

In addition, in one of the very few surveys that sought to find out why adults in OECD countries do not participate more in further education and training, lack of time was cited twice as often as the second and third most often mentioned reasons (costs and family); (OECD 2003b:122ff.).

6.3 Contributions and limits of this work and implications for further research

The exploration of an expansive and heterogeneous global field of international organizations discovering new mandates and aims is to be seen as an attempt to robustly corroborate the hypothesis that education is becoming globalized and global governance educationalized. Scholarship interested in globalization phenomena and with a particular interest in education (as in comparative education and GSP research) might directly benefit from the enlarged picture painted in this work. Many actors, and even entire areas, have remained out of scope in related research.

Further investigations in this perspective could easily span more and other organizations, particularly with regard to INGOs whose selection turned out to be less fruitful in this study. That does not mean that this type of actor has no relevance. I deliberately did not choose foundations that are internationally renowned for their work on education. Although the ones from the sample embrace LLL, they do so only in an internal or national context.

Additionally, we can easily imagine extending this educational mix to other actor types. Among them, we might mention transnational corporations, religious organizations, private or public universities with virtual campuses worldwide, think-tanks, consultancies, research institutions and even transnational communities like the Chinese, Armenian or Jewish diaspora that fund and provide education across borders, which together all make for "transnational educational spaces" (Adick 2004).

Moreover, 12 out of 88 organizations in my sample are primarily economic. The fact that they embrace educational matters is a telling phenomenon. It would have been beyond the scope of this work to explore what kind of professions dominate or have come to dominate the personnel in organizations from the sample, let alone explore what professions work on the specific issues of education and LLL and where these professionals have been trained. The widely used theoretical vocabulary stemming from neoclassical economics might hint at the fact that there is a good many trained economists involved in writing these documents.

The common practice of contracting outside experts to write policy proposals might deserve further attention. We know from economics in general that there are, indeed, a very small number of policy advisers who come from a very small number of "home universities" traveling the world with their expertise (Fourcade 2006). Showing a similar situation for education would add another (more complementing than contradicting) explanatory argument to why the educational discourse is so homogenous worldwide. It might also help to explain the unexpected and peculiarly harmonious marriage between human capital theory and empowerment, which has so far been treated as mutually exclusive, as in the models from Section 1.2.2.

More importantly, we would add a new methodological and theoretical thrust to the study of IOs, pursuing along the lines outlined in the last sections where IOs have been conceptualized as *epistemic* actors and *socializers*. IOs have excessively been analyzed in terms of their coercive, regulative and normative mechanisms. What these contributions miss is to put these tools into the wider context of an emerging epistemic productivity at the global level. The *psychological mood* I diagnosed in this work sheds light on IOs' quality as socializing institutions where the target is not states, but individuals. This has largely remained unnoticed in (sociology of) education.

Students of IOs from IR and development studies might enlarge their scope by directing their attention to this emerging global *governance of knowledge*. Such research could build on already elaborated concepts of epistemic communities (Haas 1992), but would have to complement it with more macro-sociological neoinstitutionalist assumptions of rationalization and theorization in order to capture the general mechanisms at work. The way organizations in the sample acquire, treat, process, stylize, edit and apply social scientific knowledge (both theoretical and empirical) is to be understood as a comprehensive effort to establish order in a highly complex global educational landscape. LLL as extended educational planning is, however, only one example that mirrors the dilemmas and challenges applied social sciences in general face. The "metrological mood" (Power 2004) is only the result of such rationalization attempts and we can effortlessly extend such perspectives to other areas of governance and social planning: health, law, security, housing etc. Such a *sociology of applied social sciences* would add a fresh momentum to policy analyses.

More precisely, a highly enriching approach following my work would consist of conducting more ethnographic research "on the ground", that is to say, *within* international organizations themselves, observing the process of knowledge production more directly – much in the sense of Knorr-Cetina's (1981) work on the natural sciences. This implies studying both the formulation of research policies within IOs as well as the setting of their operational agenda. Interviews with experts (including external ones) involved in the writing and editing of reports might further complement this.

However, not only understanding the fabrication of knowledge, but also understanding the nature of the cultural material and its movement (the adoption of LLL in peripheral IOs, for instance), which has been interpreted as mimesis in this work, might considerably benefit from further qualitative investigations seeking to clarify the reception mechanisms at work. Tag's (2012) analysis of the global ECCE discourse is one example for such qualitative work based on neoinstitutionalist premises exploring the flows of world culture.

By the same token, I formulate a theory desideratum for a move towards a stronger world cultural anthropology perspective within neoinstitutionalist research in general. Despite its great heuristic power, due to the focus on the cultural penetration of a macro-meso-micro distinction, by offering a vocabulary that increasingly resembles a general cultural and social theory of modernization and globalization, neoinstitutionalist research comes at a price, namely a level of abstraction much higher than some scholars might find useful (Schriewer 2007; Meyer, H.-D. 2009). If world polity theory wants to fill the world cultural fabric that is at its analytical and theoretical core with more detailed descriptions beyond the reference to overarching goals (progress and justice) and wider cultural processes (rationalization and individualization), it has to move closer to the cultural anthropological approaches with which it already shares great propinquity, although these remain largely unnoticed or undocumented. The strong emphasis on culture in its widest and most forceful sense distinguishes neoinstitutionalism from many other social scientific approaches, most clearly from political science, economics, micro-methodological sociology and education.

At the same time, it can be said that the often criticized facets of world polity thinking (lack of political conflict and overly strong constructionist view on the contingency of actors) have been, in part, the rich points that opened insight into otherwise neglected phenomena: instead of focusing on the classical political conflicts between left and right around the role of the state and the market in education, neoinstitutionalism has helped to turn towards conflicts on the outer fringes of world cultural structuration; instead of looking at the highly strategic behavior of organizations in a global struggle of ideas, neoinstitutionalist vocabulary has contributed to reveal the constructedness of actors, their scripted constitution and openness to the world cultural environment. In this sense, this work contributes to the world polity understanding of the effects of education as an institution and an ideology. By looking at theorized accounts of de-legitimation and de-institutionalization of traditional social organization, I shed light on social change “prescribed from above”.

This is, of course, more than simply admitting some explanatory power to “ideas”, as in many contributions on diffusion and transfer (Orenstein 2008 or Metha 2011, for instance). It implies an explanation as to why ideas emerge in the first place and why they become so convincingly (often ideologically) advanced and rapidly diffused, despite the fact that actors do not know how exactly these ideas impact on society, despite the fact that their implementation is often costly (both monetarily and non-monetarily) and despite the fact that they often meet an unprepared, overwhelmed adopting population. Such a position might complement prevailing approaches to the analysis of IOs in political science where ideas have kept their peculiar status as an explanatory variable of last resort.

Final conclusion

In a general warning, Friedland and Alford (1991:260) state that “Without understanding the historical and institutional specificity of the primary objects of analysis, social scientists run the risk of elaborating the rationality of the institutions they study, and as a result become actors in their reproduction.” Contrary to most works on LLL, my study has attempted to find evidence for the possibility that current efforts to institutionalize LLL are based on a cultural ideology disguised as functional theory.

The diffusion of LLL has been extraordinarily fast and wide-spread because of its theorization, which is backed by universalistic educational and economic epistemologies bringing together visions of a functional anthropology on the one hand and of linear development on the other.

With the proliferation of organizations worldwide, diffusion becomes catalyzed. Although highly heterogeneous in type, budget and staff as well as in terms of the geographical, cultural, socioeconomic and political background they represent, the IOs analyzed share a similar identity comprised of similar traits derived from a highly isomorphic script: disinterested, rationalized and scientized others that pursue the abstract world cultural goods, justice and progress. With education and LLL becoming the single most legitimated blueprint of development, borders between rich and poor, North and South, intergovernmental and non-governmental, left and right disappear.

Further, mimesis occurs beyond local cultural particularities. They are either stylized as perfectly and particularly compatible with LLL or as cultural atavism, undesired traditions that have to be overcome.

Moreover, mimesis occurs beyond functional evidence or even despite evidence of failure largely displaying the ideological character of the phenomenon and the process. Mimesis is not institutionalization, but rather the epistemological and ontological prerequisite of institutionalization. Just as with education, and much more radicalized now, LLL is backed by a highly rationalized and highly normative epistemology – the dream of a better society achieved through education – ascribing ultimate ontological status to the individual actor.

It would be wrong to decry LLL as a neoliberal distortion of an educational ideal, reducing it to its strong focus on vocational education. Much more is behind the label. It is, rather, the climax of a century-long historical-cultural drama of modernity with education at its heart. The hero of this drama is the individual. As with all heroes, they are generously equipped with capabilities that greatly exceed those of ordinary human beings.

LLL as a policy bundle or as an educational sector strategy, as in most works, is analytically much less fruitful than if it is considered as the institutionalization of an idealized model of the individual life-course and individual personality.

As shown, this construction is strongly supported by an underlying Western cultural ideology forcefully penetrating the globe *incognito* as rationalization. This penetration is made easy by relying on theorized accounts of problems and solutions. And it is made persuasive by framing it within an overarching narrative that evokes feelings about time and identity, more precisely about urgency and human individuality, and loosely borrowing from Anderson (1993), by building a global "educated imagined community".

Seen through the wider lens applied in this work, LLL is not a revolutionary concept, but another phase of radicalization of an ongoing general educational revolution that has already been around for a long time. It implies changes in degree rather than in kind: purposes, contents, sites, modes, funding and phases of learning are becoming multiplied (instead of turned upside down) in the lifelong learning idea.

Finally, stressing cultural forces means questioning the taken-for-grantedness, "naturalness" and inevitability of institutions and institutionalization. In the dominant understanding of LLL, knowledge is a component and requirement of economic, demographic, social and political realities. However, if we regard LLL as a rationalized myth institutionalized at the world cultural level, the same economic, demographic, social and political realities become subject to the culture and the knowledge therein that have been made visible in this work.

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Appendices

Appendix A: Sample (alphabetical order)

Table A.1: Sample and characteristics

Organization	Abbrev.	HQ	Found.	Type code	Area code
African Development Bank	AFDB	Abidjan	1964	3	8
African Union	AU	Addis Ababa	2001	2	8
Agence Française de Développement	AFD	Paris	1941	4	7
Agência Brasileira de Cooperação	ABC	Brasil	1950	4	5
Agencia española de Cooperación Internacional para el Desarrollo	AECID	Madrid	1988	4	7
American Howard Hughes Medical Institute	Hughes	Maryland	1953	7	7
Andean Community	CAN	Lima	1996	2	5
Asia-Pacific Economic Cooperation	APEC	Singapore	1989	2	3
Asian Development Bank	ADB	Pasay City	1965	3	3
Association of South East Asian Nations	ASEAN	Jakarta	1967	2	3
Bill&Melinda Gates Foundation	Gates	Seattle	1999	7	6
Bolivarian Alliance for the Americas	ALBA	Caracas	2004	2	5
British Wellcome Trust	Wellcome	London	1936	7	7
Building and Wood Workers International	BWI	Geneva	1934	6	9
Business Europe	BE	Brussels	1958	5	7
Business Industry Advisory Committee	BIAC	Paris	1962	5	8
Caribbean Community	CARICOM	Georgetown	1973	2	5
Carribean Congress of Labour	CCL	Barbados	1960	6	5
Central American Interagtions System	SICA	San Salvador	1991	2	5
Commonwealth of Learning	COL	Vancouver	1988	2	8
Council of Europe	CoE	Strasbourg	1949	2	7
Council of Europe Development Bank	CEB	Strasbourg	1956	3	7
Department for International Development	DFID	London	1997	4	7
Development Bank of Central African States	DBCAS	Yaoundé	1975	3	1
Dominican Republic-Central America Free Trade Agreement	CAFTA	/	2004	2	5
East African Community	EAC	Arusha	2000	2	1
Economic and Social Council	ECOSOC	New York	1945	1	9
Economic Community of West African States	ECOWAS	Abuja	1975	2	1
Economic Cooperation Organization	ECO	Teheran	1985	2	8
Education International	EI-IE	Brussels	1993	6	9
Eurasian Economic Community	EURASEC	Almaty et al.	2000	2	4
EuropeAid	EUAID	Brussels	2001	4	7
European Association of Craft Small and Medium-Sized Businesses	UEAPME	Brussels	1979	5	7
European Bank for Reconstruction and Development	EBRD	London	1991	3	7
European Federation of Public Service Unions	EPSU	Brussels	1973	6	7

European Metalworkers Federation	EMF	Brussels	1963	6	7
European Round Table	ERT	Brussels	1983	5	7
European Trade Union Confederation	ETUC	Brussels	1958	6	7
European Union	EU	Brussels	1952	2	7
Ford Foundation	Ford	New York	1936	7	6
General Confederation of Trade Unions	GCTU	Moskow	1992	6	9
Gesellschaft für Internationale Zusammenarbeit	GIZ	Mannheim	2011	4	7
Indian Ocean Commission	IOC	Ebène	1982	2	3
Indian Ocean Rim Associations for Regional Cooperation	IOR-ARC	Ebène	1997	2	3
Inter-American Development Bank	IDB	Washington DC	1959	3	8
Intergovernmental Authority on Development	IGAD	Djibouti Capital	1986	2	1
International Chamber of Commerce	ICC	Paris	1920	5	9
International Confederation of Arab Trade Unions	ICATU	Damascus	1956	6	2
International Confederation of Free Trade Unions	ICFTU	Brussels	1949	6	9
International Federation of Chemical, Energy, Mine and General Workers´ Unions	ICEM	Geneva	1995	6	9
International Labour Organization	ILO	Geneva	1919	1	9
International Metalworkers Federation	IMF	Geneva	1893	6	9
International Monetary Fund	IMF	Washington DC	1945	1	9
International Textile, Garment and Leather Workers Federation	ITGLWF	Brussels	1970	6	9
International Trade Union Confederation	ITUC	Vienna	2006	6	9
International Transport Workers Federation	ITF	London	1896	6	9
International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers A	IUF	Geneva	1920	6	9
Islamic Development Bank	IDB	Jeddah	1975	3	2
Japan International Cooperation Agency	JICA	Tokyo	2003	4	3
League of Arab States	LAS	Cairo	1945	2	2
Mercado Común del Sur	MERCOSUR	Montevideo	1991	2	5
Nordic Development Fund	NDF	Helsinki	1989	3	7
North American Free Trade Agreement	NAFTA	Ottawa et al.	1994	2	6
Organization for Democracy and Economic Development	GUAM	Kiev	1999	2	4
Organization for Economic Cooperation and Development	OECD	Paris	1960	1	8
Organization of American States	OAS	Washington DC	1948	2	8
Organization of Eastern Caribbean States	OECS	Castries	1981	2	5
Organization of the Black Sea Economic Cooperation	BSEC	Istanbul	1992	2	8
Pacific Island Forum	PIF	Suva	1971	2	3
Partners in Population and Development	PPD	Dhaka	1994	1	1
Public Services International	PSI	France	1907	6	9
Saudi Arabian Mohammed bin Rashid Al Maktoum Foundation	Rashid	Dubai	2007	7	2
South Asian Association for Regional Cooperation	SAARC	Kathmandu	1985	2	3
Southern African Development Community	SADC	Gaborone	1992	2	1
Stichting INGKA Foundation	INGKA	Leiden	1982	7	7
Stichting Nederlandse Vrijwilligers	SNV	The Hague	1965	4	7
Union for the Mediterranean	UMF	Barcelona	2008	2	8
Union Network International	UNI	Geneva	2000	6	9

Union of South American Nations	UNASUR	Quito & Cochabamba	2004	2	5
United Nations Children´s Fund	UNICEF	New York City	1946	1	9
United Nations Educational, Scientific and Cultural Organization	UNESCO	Paris	1945	1	9
United Nations Industrial Development Organization	UNIDO	Vienna	1967	1	9
United States Agency for International Development	USAID	Washington DC	1961	4	6
West African Bank	BOAD	Lomé	1974	3	1
World Bank: International Bank for Reconstruction and Development + International Development Association	WB (IBRD+IDA)	Washington DC	1945 + 1959	1	9
World Federation of Trade Unions	WFTU	Athen	1949	6	9
World Health Organization	WHO	Geneva	1948	1	9
World Trade Organization	WTO	Geneva	1995	1	9

Note:

N=88

Types 1-7:

1=Multilateral intergovernmental organizations (IGOs)
2=Multilateral regional intergovernmental organizations (regional IGOs)
3=Multilateral regional and financial intergovernmental organizations (regional development banks)
4=Bilateral internationally-oriented national organizations (development agencies)
5=International nongovernmental business organizations (business INGOs)
6=International nongovernmental labor organizations (labor INGOs)
7=International nongovernmental philanthropic organizations (philanthropic INGOs)

Areas

1=Sub-Sahara Africa
2=Middle East/Northern Africa
3=Asia & Pacific
4=Former USSR
5=Latin America & Caribbean
6=North America
7=Europe
8=mixed
9=global

Appendix B: Statistical Analysis

Appendix B.1: Definition[113] of variables in quantitative / document analysis

An organization explicitly refers to *education* in at least one published document as follows:

English: education

Spanish: educación

French: éducation

German: Bildung and Erziehung

Portuguese: educação

An organization explicitly refers to *lifelong learning* in at least one published document as follows:

English: lifelong learning; life-long learning; life long learning; learning throughout life

Spanish: aprendizaje permanente; formación permanente;

French: apprentissage tout au long de la vie; formation tout au long de la vie, éducation toute au long de la vie

German: lebenslanges Lernen

Portuguese: aprendizagem ao longo da vida

[113] Translations have been taken from scientific publications and official policy documents published in the respective language by the EU.

Appendix B.2: Description, tests and results

Expansion

Table B.1 : Trend analyzes for sample parameters[114]

	Increase in foundations	**Average increase in budget**	**Average increase in staff**	**Average stafincrease**	**Average increase in member countries**	**Average increase in member countries**	**Average increase in individual members**	**Average increase in type of publications**
N	89	7[1]	14[2]	23[3]	25[4]	35[5]	7[6]	20[7]
Observations	89	10	11	5	11	7	9	11
Kendall's tau	.99	.94	.92	.80	.98	.97	.72	.78
S	3866.00	34.00	51.00	8.00	44.00	20.00	25.00	43.00
Var (S)	79562.66	198.18	354.72	34.67	294.00	86.60	206.30	401.45
p	.00**	.019*	.008**	.235	.012*	.041*	.095	.036*
Sen slope	1	2091	148.33	97.12	5	5.16	1.75	.867
confidence	]0.818; 1.143[	]689.25; 3942.25[	]46.05; 242.100[	]115.25; 162.15[	]2.20; 8.80[	]2.00; 9.00[	]-1.50;6.12[	]0.00;2.21[

Note: *p* value approximated and continuity-corrected.
* $p < .05$; ** $p < .01$

[1] ILO; UNICEF; UNESCO; UNIDO; WHO; ADB; WB (IDA+IBRD)
[2] IMF; UNICEF; UNESCO; WB; WHO; WTO; CARICOM; CoE; ECOWAS; OAS; CCL; EMF; WFTU; EMF
[3] See above and LAS; IDB; BOAD; ICFTU; ITGLWF; ITF; IUF; PSI;
[4] ECOSOC; ILO; IMF; UNICEF; UNESCO; WB; WHO; WTO; CoE; OAS; LAS; AFDB; ADB; IADB; ICC; CCL; EMF; ICATU; ICFTU; IMWF; ITGLWF; ITF; IUF; PSI; WFTU;
[5] See above and OECD; UNIDO; CARICOM; ASEAN; DBCAS; IDB; BOAD; BIAC; BusinessEurope; ETUC;
[6] ICATU; IMWF; ITGLWF; IUF; ITF; ICFTU (value for 2009 has been extrapolated based on NIPALS method); WFTU; IMF; OECD; UNICEF, UNESCO; UNIDO; WB; WHO; WTO; CoE; OAS; IADB; ICC; ICATU; ICEM; ICFTU; IMF; ITF; IUF; PSI; WFTU;

[114] The null hypothesis H_0 for these tests is that there is no trend in the series. The three alternative hypotheses that there is a negative, non-null, or positive trend can be chosen. The Mann-Kendall tests are based on the calculation of Kendall's tau measure of association between two samples, which is itself based on the ranks with the samples. Autocorrelation has been taken into account using the Yue & Wang method (2004), which performs better than Hamed & Rao's (1998) approach if there is both a trend and an autocorrelation. The close the value of Sen's slope is to 0, the lesser the trend. The sign of the slope tells if the trend is increasing or decreasing. Note that although nonparametric trend tests are robust against missing values, they tend to underestimate trends if number of observations is low. The literature at times mentions four, at times six for the minimum of observations. The lowest value in my series is five (for staff N=22). All other trends have at least six observations.

Boundedness

Table B.2: Aims frequencies and test statistics

	Observed N	Expected N	Residual		aims
development	35	23,5	11,5	Chi²	11.25[a]
development and education	12	23,5	-11,5	df	1
Total	47			p	.001

[a] 0 cells (0,0%) have expected frequencies less than 5. The minimum expected cell frequency is 23,5.

Diffusion of Lifelong Learning

Table B.3: Model Summary and Parameter Estimates

Dependent Variable: n_references

	Model Summary								Parameter Estimates	
Equation	R²	R	Adjusted R²	F	df	df2	Std. Error of the Estimate	Sig.	Constant	b1
Linear	.165	.407	.127	4.359	1	22	2.768	.049	-338.625	.170
Logarithmic	.166	.408	.128	4.370	1	22	2.766	.048	-2593.305	341.479

The independent variable is Date.

Table B.4: Residuals Statistics[a]

	Minimum	Maximum	Mean	Std. Deviation	N
Predicted Value	.54	4.46	2.50	1.205	24
Std. Predicted Value	-1.626	1.626	.000	1.000	24
Standard Error of Predicted Value	.567	1.096	.780	.178	24
Adjusted Predicted Value	.45	5.10	2.54	1.267	24
Residual	-3.949	7.733	.000	2.707	24
Std. Residual	-1.426	2.793	.000	.978	24
Stud. Residual	-1.507	2.880	-.006	1.018	24
Deleted Residual	-4.409	8.220	-.037	2.934	24
Stud. Deleted Residual	-1.555	3.565	.037	1.150	24
Mahal. Distance	.005	2.645	.958	.873	24
Cook's Distance	.000	.261	.042	.076	24
Centered Leverage Value	.000	.115	.042	.038	24

[a] Dependent Variable: n_references

Figure B.1: Predicted/ standardized residuals

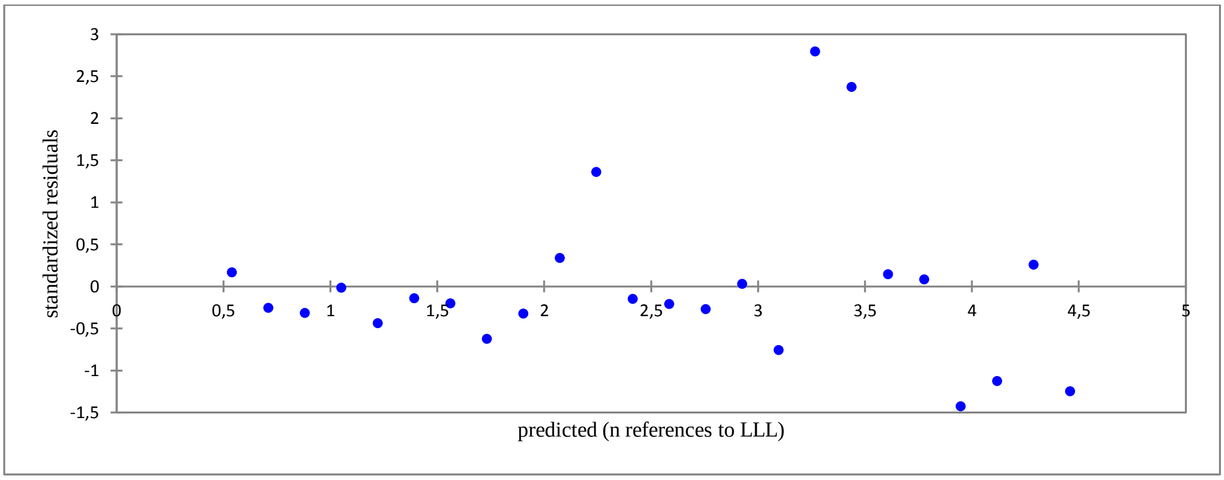

Table B.5: Number of references and waiting time by type, age and area of organizations

	type*n orga referring to LLL	**type*waiting time**	**age*n orga referring to LLL**	**age*waiting time**	**area*n orga referring to LLL**	**area* waiting time**
Test	Chi² (Fisher's)	Kruskal-Wallis	Chi²	Mann-Whitney	Chi² (Fisher's)	Kruskal-Wallis
Value	12.47	*K* (observed) = 5.38 *K* (critical) = 12.59	.78	*U*=547.00 (expected=387.00) Var (*U*) 3967.06	10.37	*K* (observed) = 8.26 *K* (critical) = 15.50
df	6	6	1	/	8	8
p	.03*	.49	.38	.01*	.12	.40
N	88	88	88	88	88	88

Note: * $p < .05$

Table B.6: Organizations' references to education by number of documents (N=88)

Orga	N	Orga	N	Orga	N	Orga	N
EU	277301	IMF	2760	MERCOSUR	110	BWI	17
WB	255874	WTO	2580	AECID	100	CAN	16
OECD	100000	BusinessEurope	1287	EPSU	97	BSEC	15
UNESCO	78376	AFD	1283	ICFTU	94	ITGLWF	15
ADB	33839	PIF	1200	ETUC	88	ECOWAS	12
Hughes I.	18900	APEC	905	ECOSOC	87	CAFTA	11
OAS	18176	CoE	800	ITF	87	IOC	9
UNICEF	17108	SICA	593	UEAPME	80	IUF	8
EuropeAid	16500	GIZ	499	EMF	77	GUAM	7
AFDB	16085	BIAC	381	DBCAS	74	UNASUR	7
ILO	15523	USAID	375	PSI	74	INGKA	6
IADB	11172	SAARC	366	OECS	69	ICEM	4
Wellcome T.	8900	Ford Found.	250	UFM	59	NAFTA	4
WHO	8241	UNI	250	NDF	55	BOAD	3
EI-IE	8120	ITUC	227	EAC	50	EURASEC	3
SNV	6730	PPD	202	IMWF	48	ICATU	3
DFID	6220	WFTU	196	SADC	47	ABC	2
CARICOM	4960	CEB	177	LAS	46	CCL	2
UNIDO	4780	IDB	136	AU	42	GCTU	2
Gates Found.	3794	ICC	135	ERT	31	IOR-ARC	2
COL	3328	Al Makhtoum Found.	133	ASEAN	29	ALBA	1
JICA	3270	EBRD	130	ECO	23	IGAD	1

Table B.7: Organizations' references to lifelong learning by number of documents (N=88)

Orga	N	Orga	N	Orga	N	Orga	N
EU	6743	CARICOM	39	ITUC	4	DBCAS	0
OECD	5620	WTO	28	OECS	4	PSI	0
UNESCO	5609	EPSU	27	ASEAN	4	NDF	0
WB	2547	ETUC	26	AFD	3	ECO	0
ILO	1403	EMF	25	CEB	3	BWI	0
BusinessE.	945	Wellcome T.	24	IDB	3	ITGLWF	0
COL	901	Gates Found.	24	SICA	2	CAFTA	0
CoE	799	PIF	22	WFTU	2	IOC	0
OAS	787	DFID	19	EBRD	2	IUF	0
AFDB	658	GIZ	19	UFM	2	GUAM	0
EuropeAid	447	ADB	18	AU	2	UNASUR	0
UNI	146	ECOSOC	14	PPD	1	INGKA Found.	0
BIAC	129	JICA	12	ICC	1	ICEM	0
UEAPME	116	IMWF	10	EAC	1	NAFTA	0
UNICEF	72	Hughes I.	9	SADC	1	BOAD	0
USAID	71	AECID	9	LAS	1	ICATU	0
IMF	67	ERT	8	BSEC	1	ABC	0
IADB	65	CAN	7	ECOWAS	1	CCL	0
APEC	64	SAARC	6	EURASEC	1	GCTU	0
WHO	48	ICFTU	6	Al Maktoum Found.	0	IOR-ARC	0
EI-IE	48	SNV	4	MERCOSUR	0	ALBA	0
UNIDO	46	Ford Found.	4	ITF	0	IGAD	0

Table B.8: The diffusion of lifelong learning by year and organization

<table>
<tr><th>Year</th><th>Orga</th><th>Year</th><th>Orga</th></tr>
<tr><td>1990</td><td>UNESCO</td><td rowspan="7">2007</td><td rowspan="7">ADB; AECID; BSEC; CAN; CoE; JICA; SADC; SNV; UNIDO; WTO</td></tr>
<tr><td>1993</td><td>EU</td></tr>
<tr><td>1995</td><td>UNICEF</td></tr>
<tr><td>1996</td><td>OECD</td></tr>
<tr><td>1998</td><td>WHO</td></tr>
<tr><td>1999</td><td>APEC; Gates Foundation; WB</td></tr>
<tr><td rowspan="2">2000</td><td rowspan="2">ASEAN; Ford Foundation; ICFTU; ILO; OECS; UEAPME</td></tr>
<tr><td>2008</td><td>EBRD; EPSU; EURASEC; LAS</td></tr>
<tr><td>2001</td><td>BIAC; ERT; OAS</td><td rowspan="2">2009</td><td rowspan="2">CARICOM; EAC; ECOWAS; EI</td></tr>
<tr><td rowspan="2">2002</td><td rowspan="2">EuropeAid; IMWF</td></tr>
<tr><td>2011</td><td>GIZ</td></tr>
<tr><td>2003</td><td>IADB; USAID</td><td rowspan="2">2012</td><td rowspan="2">EMF; BusinessEurope; ICC; ITUC; UMF</td></tr>
<tr><td>2004</td><td>AFDB; DFID; WFTU</td></tr>
<tr><td>2005</td><td>PIF</td><td>2013</td><td>PPD</td></tr>
<tr><td>2006</td><td>AFD; AU, CEB; CoL; ECOSOC; ETUC; IDB; IMF, SAARC; UNI, Wellcome Trust</td><td colspan="2">No date: SICA; Howard Hughes Institute</td></tr>
</table>

Appendix C: Qualitative analysis

Appendix C.1: Bibliography of analyzed documents

Table C.1: Bibliography of analyzed documents with source links

Orga	**Documents**
Multilateral (intergovernmental) Organizations	
Economic and Social Council (ECOSOC)	ECOSOC (2006) *United Nations Economic and Social Council (ECOSOC) ministerial declaration on generating full and productive employment and decent work for all.* Geneva. Accessed 15/07/2013, <<http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_gb_297_wp_sdg_1_en.pdf >>
	ECOSOC (2011) *Theme of the annual ministerial review: implementing the internationally agreed goals and committents in regard to education - Report of the Secretary-General.* Geneva. Accessed 15/07/2013, <<http://portal.unesco.org/geography/es/files/13904/13015146765implementing-internationally-agreed-goals-education.pdf/implementing-internationally-agreed-goals-education.pdf >>
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Total n = 59	**Total n = 252**

Appendix C.2: Concept/category system with in-vivo codes

Explanatory note:

This table illustrates the research process in line with Grounded Theory Methodology. The right column compiles the natural codes (or in-vivo codes), that is, the original terms and formulations found in documents. They have then been abstracted and reduced in complexity through the construction of thematically-grouped concepts (middle column), which subsequently form the ground for broader categories and families. In-vivo codes, here, are not shown in their reference context since they represent generic and recurrent indicators for more abstract categories.

Table C.2: Concept/category system with in-vivo codes

Categories	Concepts	Selected in-vivo codes/ indicators
	Code family I: Causes, conditions, consequences	
causal arguments	socio-economic	Underdevelopment; low growth rates; (long-term) unemployment; labor market mismatches; low productivity; high informality in economy; underemployment; increase of knowledge-intensive service sectors; free markets; trade agreements in education services; internationalization of economy; knowledge economy; globalization of goods, services, investment; demise of Taylorism or Fordism; Poor training, low productivity jobs and low wages trap the working poor and exclude young persons from participating in economic growth; low skills; The stru c t u ral ch a n ges taking place in the world economy have created greater demand for training and education at all levels; Lifelong learning is key to ensuring good transitions between jobs and occupations and to avoiding long-term unemployment leading to loss of human capital; acknowledged the role that entrepreneurship education (EE) at school level could play in addressing the region-wide problem of youth unemployment; Widening income gaps; poverty; child poverty; attainment gaps between countries and within, men and women; polarisations between the knowledge-haves and knowledge have-nots; child labor; trabajo infantil; Closing the educational divide within and between countries; educational poverty; increased need for formal qualifications; low educational quality; low participation/ attendance rates;
	legal (human rights)	Education as human rights; human right to lifelong learning; rights-based approach to LLL; right to education, including the right to receive free compulsory education, and access to vocational and continuing training; every citizen has an equal right to education and to culture; droit à la qualité de la vie (éducation, santé, retraite, assistance); derecho a la educación por la Declaración Universal de Derechos Humanos de 1948; the right to lifelong learning must be reinforced through statutory means and/or collective bargaining; right to education is the right to life-long learning;
	demographic	Aging; ageing; aging workforce; demographic change; changes in family structure; rapidly aging teacher profession; feminization of labor force; population growth; decline in young population; individualism (single-parent/ one-person household); burgeoning young populations in the South and ageing populations in the North; emigration from South to North, from poor to rich; youth bulges; aging societies; demographic ageing and drop in fertility;
	techno-economic	Information and communication technology (ICT); technological change; biotechnology; (ICT) is therefore an indispensable prerequisite for work across the wider spectrum of business. ICT skills should be a standard set of tools accessible to pupils from primary school on. Renewal of these skills and

		competencies should be among the main pillars of lifelong learning (LLL), starting from early childhood education and continuing throughout training in the framework of an adult's career; develop policies to deliver life-long learning and information technology skills upgrades for teachers; improve the access to lifelong learning for all workers and to develop ICT literacy; it is more difficult for older workers to find a job in the ICT industry, and it supports the notion that life-long learning is crucial; Lifelong learning ensures that the individual's skills and competencies are maintained and improved as work, technology and skill requirements change; to cope with the latest update in technology; Consider the necessity of constant modernizing of technical and vocational education and training to keep up with the rapid changes brought about by globalization and technology and strengthen the cooperation in this field among BSEC Member States, Traditional policies and institutions are increasingly ill-equipped to empower citizens for actively dealing with the consequences of globalisation, demographic change, digital technology and environmental damage.
	socio-cultural expectations	Social expectation; social value of education; expectations of social conventions; efforts to increase the number of countries adopting early learning development standards (ELDS), or expectations of what children at certain ages should know and be able to do in different development domains; the expectation of leaders, citizens, and students of national education systems—that education can be an engine of economic progress and a chance for people to transform and improve their lives—all point to the immense challenges that these systems face;
	work place flexibility	changing work environment: flexible work arrangement, fewer hours, part-time employment; an environment where workers are given wider choices and a work and family balance is respected; The lack of flexible working time that would support a better work-life balance and the scarcity of lifelong learning practices are often quoted; promote supportive policies to enable individuals to balance their work, family and lifelong learning interests; stress and burn-out;
	ethno-cultural diversity	Cultural, ethnic, linguistic diversity; are expected to contribute actively to society, and must learn to live positively with cultural, ethnic and linguistic diversity;
goals/ benefits/ expected outcomes (educational increase and access is taken for granted)	individual: empowerment	Women's economic empowerment; economic empowerment; children's empowerment; social empowerment; capacitación; motiver les individus à s'engager dans la responsabilisation de leur parcours d'insertion et de professionnalisation; maîtrise de son avenir professionnel; community-empowerment; individual empowerment; empowerment of individuals; farmer empowerment; the empowerment of communities - their ownership and control of their own endeavours and destinies; learner empowerment; education constributes to gender empowerment; governance for empowerment; empowerment of citizens; youth empowerment; empowerment of the learner to master the tools of knowledge; empowerment of students to make informed career decisions; need to exercise greater independence and judgement combined with a stronger sense of personal responsibility; emancipation;
	collective: economic	Economic growth; economic progress; economic development; economic prosperity; productivity; ; competitiveness; adaptability of the workforce; full employment; formal economy; knowledge for economy; Contributing to the achievement of economic development beginning with the satisfaction of the labour market needs in the public and private sectors; This programme areas is expected to impact strongly on the development of life-long learning leading to the development of a more educated human resource base; Lifelong learning ensures that the individual's skills and competencies are maintained and improved as work, technology and skill requirements change; ensures the personal and career development of workers; results in increases in aggregate productivity and income; national economic growth; Lifelong learning will be essential for ensuring that workers remain productive, especially as populations and labour forces age over the coming decades; able to support the transition to a market-oriented economy; progress; crecimiento conómico; croissance économique; The World Bank (2010) STEP framework Skills Towards Employment and Productivity is a helpful model. It shows how a sequenced combination of education, training and labour market activities can contribute towards increased productivity and economic growth; Education and training is a prerequisite for economic growth, because it ensures that vacancies are filled with qualified staff; provide access to education and life-long learning, as well as promote employment as a means to overcome poverty; There is quality in education when teaching and learning results in the acquisition of knowledge, values, attitude, skills and competencies that are relevant and impact on the individual child and the society for social and economic development;

	individual: employability	Employability; improve career opportunities; higher earnings; programs for skills' management and lifelong learning that support continued employability; to develop policies and programmes for enhancing the employability of youth, including through education, training and lifelong learning that meet labour market requirements; further enhance the value of this training and boost their employability; lifelong learning for employability became more and more important; Employability can best be defined as 'possession of qualities and competences to meet the ever-changing needs of the market and the organisation, as well as the pace of technological change;
	collective: social cohesion	Equity; equality; integration into national socities and world society; more equity in working time arrangements between women and men; lifelong learning and enhancement of earning capabilities for poverty reduction. It ensures equity in access and human resource development; gender equity; participation in public life; participate in social and political life; higher civic participation; inclusion;
	individual: capacities/potential	so that each and every one of us has the chance to realize our full potential; the continuum of lifelong learning for children to maximize their potential as individuals and as members of a productive society; Investments in prenatal health and early childhood development programs that include education and health are essential to realize this potential; d lifelong learning directed to: The full development of human potential and sense of dignity and self-worth, and the strengthening of respect for human rights, fundamental freedoms and human diversity; The development by persons with disabilities of their personality, talents and creativity, as well as their mental and physical abilities, to their fullest potential; Enabling persons with disabilities to participate effectively in a free society; to develop their potential to the full; Adult learning is especially relevant for migrants as it offers an opportunity to develop their potential; promoting the development of human potential; Education, including technical and vocational education and training, has much to contribute to holistic human development; implementation of appropriate education and training policies to attain human development, economic and employment growth, and poverty eradication; Education and skills development underpin any strategy of human development and productivity as it is through education that the necessary skills, knowledge and aptitudes are acquired, and the creative abilities of individuals released, to open the way to a better life and society; human development index (educational); Education is a pillar of human development and a powerful tool for poverty alleviation;
	individual: personal development	broadening their competences offer the best chance for personal development; concerning personal development, it was necessary to emphasise more flexibility and employability of the employees; Demonstrate how fl exible working time can contribute to life long learning and improved access to education, training and personal development; multiple goals of education – such as personal development, knowledge development, economic, social and cultural objectives – ; personal development account (WB 2003b); personal development of individuals but it also contributes to the development of society at large; basic education must lead to the acquisition of key skills, used as personal development tools, and later on, as a basis for lifelong learning; providing opportunities for personal development to those who have attained significant levels of formal education; greater choice and opportunity; realize full potential; personal transformation; personal fulfilment; well-being;
	collective: values	Tolerance; democracy; Democratic norms, values and structures; Whereas the role of lifelong learning is becoming fundamental in order to secure personal fulfilment, imparting to the individuals concerned such values as solidarity and tolerance and furthering participation in democratic decision-making processes; strengthening democratic institutions; Preparation for responsible citizenship;
	other: identity formation	The preservation and strengthening of positive African morals, traditional values and cultures and the development of national and African identity and pride; to exercise their duties in democratic and pluralistic societies that extend across the various borders od the traditional nation-state; Building a harmonious ASEAN Community requires all citizens of ASEAN countries to be lifelong learners, and all agencies to become providers of lifelong learning opportunities; adding a specific European dimension to three of the eight key competences agreed: social and interpersonal competences, civic competence and cultural awareness. It is closely related to democratic citizenship and the aim is to provide a smooth transition from local, regional and national frameworks to the European level, leading finally to a perception of being a world citizen; the purpose being to strengthen the pan-Arab sense of belonging and feeling; application of the Inter-American Democratic Charter, which constitutes an element of regional identity; education for global citizenship;

	individual: health	It imparts knowledge, skills and the self-confi dence to transform lives, leading to better health and income as well as fuller participation in the community; The development benefits of education extend well beyond work productivity and growth to include better health, reduced fertility, an enhanced ability to adopt new technologies and/or cope with economic shocks, more civic participation, and even more environmentally friendly behavior; l'éducation a des effets mesurables et incontestables sur la démographie, la santé, la croissance économique, l'environnement, la cohésion sociale et la paix
	collective: public security	Lower criminality; disminuir los niveles violencia mediante la prevención y formación de operadores; estándar básico de capacitación y formación de operadores con los instrumentos jurídicos y profesionales necesarios para atender la problemática del crimen organizado; but poor-quality secular education systems create an opening for radical Islamist movements to establish traditional religious schools whose purpose, in part, may be to promote the worldview of their sponsors.
	individual: lower child mortality	Fewer children dying at birth;
	individual: lower fertility	The development benefits of education extend well beyond work productivity and growth to include better health, reduced fertility, an enhanced ability to adopt new technologies and/or cope with economic shocks, more civic participation, and even more environmentally friendly behavior. l'éducation a des effets mesurables et incontestables sur la démographie, la santé, la croissance économique, l'environnement, la cohésion sociale et la paix
	individual: environmentally-friendly behavior	l'éducation a des effets mesurables et incontestables sur la démographie, la santé, la croissance économique, l'environnement, la cohésion sociale et la paix;
	other: economic nationalism	Further, a qualified global workforce with the income to purchase U.S.-made products is especially important for American business; These U.S.-trained professionals become friends, customers for U.S. products, and partners in the international arena; Most Islamic schools (madrassas) have no links to extremist groups (USAID 2003), but poor-quality secular education systems create an opening for radical Islamist movements to establish traditional religious schools whose purpose, in part, may be to promote the worldview of their sponsors. This problem can be ameliorated through improvements in the quality of the secular education system, including a curriculum that focuses on preparing students to support and thrive in market-oriented democracies;
(pre) conditions	anticipation of labor market needs	According to labor market needs; what labor markets require; labor market requirements; better matching qualifications to labour market needs; Relevance of curricula and qualifications to labour market needs; anticipation of competence needs; anticipation of skills needs; following needs of the labor market; training and lifelong learning that meet labour market requirements; a mismatch between educational attainment and employment mounting up to a third of employees in members of the Commonwealth of Independent States and Mongolia; To align education more closely to the 'needs' of industry and commerce; We promote technical and vocational education and training that is responsive to the job market;
barriers (lack of access taken for granted)	lack of LLL "culture"/ attitude/ motivation	To promote a lifelong learning culture; value, attitude; trade unions and employers in fostering a culture of lifelong learning; self-directed learning competencies and the culture of lifelong learning must be given priority in the curriculum; An institutional approach that fosters the culture and practice of lifelong learning; The long-term measure of success for developing countries will be the degree to which a system and culture of lifelong learning have been established; Creating this new environment requires a change of culture, especially where teachers' status in the classroom and society arises from being perceived as an authority figure; Creating a culture of learning depends […] on stimulating demand for learning; traditional cultures reluctant to shift; attitude toward learning; The existing education and training system produces students that lack basic skills required for accessing employment, i.e. employability skills which include having the right attitude for the world-of-work; Motivated for LLL; LLL attitude; more attention to cultivating a positive attitude to learning; lack of attitude

	traditional culture	Early marriage for girls is another barrier to education in some pastoralist communities. So is a deeply engrained belief that female education may be of less value. A proverb of the Gabra ommunity in northern Kenya says: 'God first, then man, then camel, and lastly girl.' Thisexplains a reluctance to sell camels to finance girls' education, unlike for boys (Ruto et al., 2009, p. 11). The social attitudes behind such sentiments are deeply damaging for girls' education; The drought is not the only barrier to education among pastoralist children. Many parents and village elders have ambivalent attitudes to schooling, partly because they are acutely aware of the trade-offs they face. As one parent eloquently put it, 'We have to choose between wealth and knowledge — between having a prosperous herd and having educated children. We need our children to tend the cattle, even though we know they need an education.' The tension between securing livelihoods and gaining education is a recurrent theme in pastoral areas. Formal education happens in a fixed context — the classroom. By contrast, pastoralist survival often depends on children following herds over large areas; Cultural attitudes and practices that promote early marriage, enforce seclusion of young girls or attach more value to boys' education can form a powerful set of barriers to gender parity. In Nepal, 40% of girls are married by age 15 – a barrier to school completion. Norms that keep girls at home during the menses reduce their time in school and lower their school performance (Lewis and Lockheed, 2006). Distance from school is also associated with strong gender disparity effects, especially in rural areas (UN Millennium Project, 2005b). In the Lao People's Democratic Republic, distance to school is negatively related to enrolment (King and van de Walle, 2007). Similarly, research in Pakistan reports that having a state school in a village has a strong positive effect on the probability that girls aged 10 to 14 will be enrolled (Lloyd et al., 2007); Cultural reasons: Local beliefs, cultural practices and attitudes to gender roles – many parents do not see the value of sending or keeping girls in school; This problem is better understood by examining obstacles that girls encounter in seeking an education, especially in South Asia, sub-Saharan Africa, and parts of the Middle East. Barriers range from the risks of walking to distant schools and sexual harassment by male teachers and classmates to the lack of physical amenities such as separate latrines. Other obstacles include male-based curricula, cultural prejudices regarding the value of educating girls, and resistance to coeducation, especially after puberty; Obviously there are many disadvantages of such an informal system. The training is often based on traditional technology. The theoretical learning is weak and the training is limited to particular products or phases of production in the enterprise. Therefore, the trainees are unable to then apply their skill to other activities and it reduces their employability in any other industry or to operate any other type of machine; caste; Since ECD is largely provided by the private sector, affordability becomes an issue and poses a major constraint for poorer households. This problem is more pronounced in the rural areas, where poverty is more acute and where the tradition of leaving children in the care of siblings or grandparents, or having children accompanying their mothers to the farms or other work places, still remains the dominant practice for early childhood care; As the husband's family pays a dowry to his wife's family upon marriage, the husband tends to view his wife as purchased property. International organizations, NGOs and researchers have analyzed that this tradition, influenced by the violence experienced during Portuguese and Indonesian rule, is the prime cause of domestic violence. In addition, women in rural areas get married at a fairly early age , and they have only limited education and are engaged in farm work; decreasing value of TVET; inferiority of VET compared to general education; Most of the problems of professional and technical education is the negative image that most societies give to this education considering it to be the track for the underachievers, those who have not acquired high academic skills that enable them to go to university. Unless these cultural images change, it would be difficult to enhance the quality of this education to fit the job market needs and the demands of the new professions; The very narrow if quantitatively successful focus of the 1990s on primary education has produced enormous pressures on the still very small secondary and vocational systems of many countries; There is a custom in the Sucos to spending a lot of money for ceremonies such as weddings and funerals by inviting huge number of relatives and neighbours. And a relatively large amount of time and money is said to be spent on these ceremonies and festivals. ADB suggests that a change in attitude and mentality toward spending on education and children's health instead of such ceremonies is also required;
	low quality in education	there is low motivation and poor conditions of service for education sector workers; low quality of teaching and learning; lack of supervision and poor management; inadequate educational infrastructure; low access to quality science and technical education; insufficient materials for special schools; and inadequate curricula emphasis on issues of population, environment, life-long learning; The shortage of qualified teachers as well as overcrowding in classrooms contribute to low quality and efficiency; This lack of preparation stems from the low coverage and low quality of education and training, outdated curricula and the lack of feedback mechanisms, the overemphasis on rote leaming and exam outcomes, the lack of institutional diversification of learning […]; The shortage of qualified teachers as well as overcrowding in classrooms contribute to low quality and efficiency, especially at the primary

		level;
	lack of resources	lack of resources; while access to adult learning can be limited due to social, economic, cultural or geographical reasons and barriers such as lack of time, motivation, information and financing. The number of children out of school in the poorest 20% of households is more than triple that in the richest 20% (UIS/UNICEF, 2005). Direct costs to households remain a significant barrier to primary school access and attainment in more than ninety countries. Direct costs include five types of fees (for tuition, textbooks, compulsory uniforms, parent-teacher associations or community contributions, and school-based activities such as exams). A survey of ninety-four (UNESCO countries reveals that only in sixteen countries are none of these charged (World Bank, Forthcoming). Many studies highlight the link between educational outcomes and poverty. For example, a longitudinal study of primary school attainment in rural areas of the Punjab and North West Frontier provinces in Pakistan concludes that economic constraints on households are a key factor in explaining high dropout rates; Income poverty remains a pervasive barrier to school attendance and learning, particularly for girls and minority groups. WB (2012)
	shortage of teachers	showed that the serious shortage of trained teachers is a barrier to reaching the EFA goals, particularly in sub-Saharan Africa. Key strategies exist to enhance the motivation of teachers, particularly those working in rural areas.
	corruption	Second, the poor are more likely to be susceptible to corrupt practices because they have limited recourse to formal or informal channels through which to seek redress and they often lack a strong enough voice to hold service providers to account.
	distance	Physical access to schools and classrooms remains an important barrier to the achievement of the goals of Education for All, in particular in relation to girls in rural areas, isolated communities in more remote areas and migrant populations. There are many successful examples of measures to reduce distances to school or to adapt schooling to the specific living conditions in local communities; s, as distance to school is a serious barrier to attendance by girls;
	conflict and disaster	Conflicts, instability and natural disasters take their toll on education and are a major barrier
	disease	HIV; malnutrition hinders children from developing learning capacities;
	child labor	Child labour is a deeply entrenched obstacle to Education for All. Household poverty forces millions of children out of school and into paying jobs or – especially for young girls – domestic chores;
	language	The government of Viet Nam recognizes that problems facing ethnic minorities are a major barrier to universal primary education. It has established an extensive system of financial transfers targeted at households and communes with large minority populations. A 1999 law allowing minority languages to be used in education recognizes the importance of home language.
	residency requirements	Residency requirements were another major barrier, as migrants from other states make up a large share of the slum-dwelling population. Rural migrants to urban areas in China face similar problems, with the hukou (household registration) system restricting access to basic education (Box 3.9)
	school uniform	Stigma attached to not wearing a uniform or wearing one of lower quality can affect girls' attendance in particular (South Africa Department of Education, 2003).
	lack of information	Lack of transparent, accurate, and timely information is an important barrier to improving access and quality of learning
	lack of demand	The lack of demand for education is still a serious reason for not attending school.
	lack of time	

	lack of portability	These barriers and obstacles can to a large extent be attributed to a lack of transparency, lack of proper arrangements for transfer of qualifications and by incomplete systems for the recognition of learning outcomes;
	handicap	
dangers	social inequality	Gaps between educated and un-educated; unpredictability of labor market needs; market failures; undermining social cohesion; educational disparities between and within countries; the expectation of leaders, citizens, and students of national education systems—that education can be an engine of economic progress and a chance for people to transform and improve their lives—all point to the immense challenges that these systems face and push for ever greater flexibility, all of which increases stress and insecurity among workers; Unemployed individuals have fewer learning opportunities than the employed; those in small and medium-size firms have poorer access than employees of larger firms; opportunities for those with secondary school education or less are significantly fewer than for those with post-secondary education; women are at a relative disadvantage compared to men. The large earnings gaps between those with and without post-secondary education, furthermore, widen over the lifetime; Most graduates continue to be jobless as demonstrated by the unemployment figures; Education is not an automatic panacea for delayed employment. In many Arab states, young people with secondary and tertiary education face longer periods of unemployment than their peers with only basic education. Similarly, in several countries of sub-Saharan Africa, including Burundi, Cameroon, Kenya and Nigeria, youth with secondary and tertiary education have higher rates of unemployment than those with lower levels of attainment; In many countries, vocational options are viewed either as a last resort or as a possible route back into general education, rather than as a stepping stone to employment; The many benefits claimed for TVSD (e.g. higher productivity, readiness for technological change, openness to new forms of work organization, and the capacity to attract foreign direct investment) all depend on the quality of the skills acquired, and a dynamic environment in which they can be applied; inequity in access to and participation in LLL programs;
	educational “distortions”	social devaluation of TVET and overevaluation of HE; too much specialized technical knowledge and too little general knowledge; inflation of formal titles;
	low quality	poor quality of programs; As far as risks are concerned, cross-border education activities are not subject to adequate government control and provide educational services that may be of low quality because they essentially seek to achieve maximum profit;
	Code family II: populations	
target groups	by non-specified criteria “marginalized” or “disadvantaged“	people with special needs (learning disabilities), internally displaced persons, people with HIV/ AIDS; refugees; children under constant care; street and working children, nomadic communities, children in remote environments and areas of conflict, minority groups, HIV/AIDS orphans, child prisoners and disabled children; children from disadvantaged families; the disadvantaged; the marginalized; the under-privileged; the unreached; those at risk; endangered communities; people in countries with disasters and conflicts; people in post-conflict countries; under-represented groups; the most vulnerable; underserved communities; los mas necesitados; under-represented groups; against labor market discrimination; employment disparities; equal access to LLL; green inclusive economy; l'équité dans cet accès (filles et garçons, ruraux et urbains); some measures to enhance access to health services for disadvantaged people;
	by age	the unborn/ in utero; Children (starting from 2 years of age); the young; adults; the elderly; senior citizens
	by socioeconomic status	unemployed, underemployed, employed (employees); workers; informal economy workers, service industry workers; traditional economy workers; workers in the rural economy; workers in small and medium-sized enterprises; workers in self-employment; non-manual workers; poor and excluded workers; sectores tradicionalmente marginados; social drop-outs; mis-educated; job seekers;
	by sex/ gender	Girls; women; con perspectiva de género; with gender concerns; l'équité dans cet accès (filles et garçons, ruraux et urbains)

	by educational attainment/ status	Illiterate; non-skilled; out-of-school children; the training have-nots; early school leavers; low-achievers; school leavers; primary students; secondary students; higher education students; PhD students; las personas poco cualificadas; non-traditional students;
	by occupation	Farmers; teachers; health workers; ICT businesses; profesorado; docentes;
	by geographic location	rural communities; urban communities; remote communities; scattered and isolated populations; l'équité dans cet accès (filles et garçons, ruraux et urbains)
	by minority status	Afro-Andean (Afro-Peruvian) populations; Madrahs; Dalits; indigenous tribes; nomadic communities; migrants; Roma children; foreign workers; ethnic-religious minorities; migrant workers in the Diaspora;
	by professional position	human resources department staff, administrative staff; government officials; leaders;
Code family III: educational implications		
educational level/ life course phase	further/ continuing/ adult education/ TVET	Further education; continuing education; adult TVEDT; adult training; professional education ; union education; formación ocupacional;
	secondary education	Junior secondary; senior secondary; lower secondary; upper secondary; initial TVET; initial training; inserción laboral;
	early childhood care and education (ECCE)	Pre-primary education; kindergarten; from 2 years on;
	higher education (incl. doctorate level)	First cycle; second cycle; doctorate/ PhD level; tertiary education;
	primary education	Elementary education; until grade 4-6;
	career ending education	Transition from work to retirement;
	education after retirement	Senior citizenship education;
curriculum	subject area: TVET	Professional training, business education; ICT; in-service; on-the-job; VSED; Promoting entrepreneurship can be a significant pathway for women to work in developed and developing countries alike (BIAC 2011:4)
	basic skills	Literacy; numeracy; neo-literacy; éducation de base; les compétences nécessaires à un apprentissage tout au long de la vie et acquérir une alphabétisation;
	"key/ cross-curriculum competencies"	Cognitive, social, lingustic skills; verbal ability, working memory, numeracy, and problem-solving abilities; reasoning; critical thinking; communication; democratic values; understanding of political processes; self-perception; self-confidence; learning to learn; information retrieval skills; learning and thinking techniques; ways of organizing knowledge; forms of expression; interpersonal and social relations; knowledge; attitude; values; mental tools;

		good generic skills, including the ability to organise, to work in teams and to communicate effectively;
	subject area: human rights/ democratic citizenship	Civic education; gender; conflict management; peace; civic responsibility; human trafficking; intercultural understanding/ competence; moral reasoning and action; democratic values; diversity;
	subject area: "life skills"	Health; maternal health; reproductive health; HIV/AIDS/STI; Life skills can be described as 'a group of psychosocial competencies and interpersonal skills that help people make informed decisions, solve problems, think critically and creatively, communicate effectively, build healthy relationships, empathise with others and cope with and manage their lives in a healthy and productive manner' (WHO, 2003). The InterAgency Working Group on Life Skills in EFA arrived at a minimum consensus that life skills are not a domain or subject, but cross-cutting applications of knowledge, values, attitudes and skills that are important in the process of individual development and in lifelong learning;
	identity	The preservation and strengthening of positive African morals, traditional values and cultures and the development of national and African identity and pride; to exercise their duties in democratic and pluralistic societies that extend across the various borders od the traditional nation-state; Building a harmonious ASEAN Community requires all citizens of ASEAN countries to be lifelong learners, and all agencies to become providers of lifelong learning opportunities; adding a specific European dimension to three of the eight key competences agreed: social and interpersonal competences, civic competence and cultural awareness. It is closely related to democratic citizenship and the aim is to provide a smooth transition from local, regional and national frameworks to the European level, leading finally to a perception of being a world citizen; the purpose being to strengthen the pan-Arab sense of belonging and feeling; application of the Inter-American Democratic Charter, which constitutes an element of regional identity; education for global citizenship; This requires, among other things, that curriculum development be based on the principle of combining national, Arab and world visions.
	subject area: foreign languages	higher status to minority languages (e.g. Romani); business English; proficiency in three European languages;
	subject area: environment	Resource efficiency; concepts of nature;
	subject area: social studies/ history	common sense of history and cultural identity; understanding/ appreciation of larger society/ civic order; cultural, civic and economic studies;
	subject area: humanities	Arts; literature;
	traditional knowledge	Local knowledge; indigenous languages and knowledge systems; ethnoeducación; ethno-education;
	subject area: sciences	mathematical-analytical skills and their applications; scientific ways of mastering and applying technological knowledge; information and communication science;
	subject area: other	Fire safety; road safety; physical education; organized crime; drug abuse and drug trafficking;
	subject area: religion	Right knowledge consists of both knowledge of the religion and knowledge for worldly advancement. It is a religious obligation for Muslims to fully immerse themselves in both forms of knowledge;

learning mode/ settings	formal	Universal public primary and secondary education; apprenticeship schemes; intended episodes of learning; life-wide learning; schooling; modern economy skills;
	non-formal	On-the-job training; at home; at work; in the community; life-wide learning;
	informal	Unanticipated episodes of learning; life-wide learning; informal economy skills; traditional skills; life;
Learning theory and didactic method	open and distance learning using ICT	Virtual universities; technology-supported delivery; blended learning; print; radio; TV; internet; self-learning; open access modalities; communities of practice; global digital libraries and resource centres; digital learning tools; self-directed learning; on-line ICT learning for 'round-the-clock' and 'on-the-move' access to learning services; independent learning; e-learning; Given that the IT training can be implemented within the company, access is greatly facilitated;
	learner-centred learning process	Personalized; customized; child-centred; individual demand-led; individualized; tailored to interests and needs; g; continual identification of and responses to students' needs; adapt teaching strategies to individual needs; learner-driven; competency-driven; student-centred; individual learning accounts; independent learning; self-planned; self-initiated; flexible working time arrangements to pursue studies; tele-learning/ working; Greater attention needs to be paid to the teaching-learning process through the adoption of student-centred approaches,;
	inclusive education	including an inclusive model at the preschool education level and a model for partial inclusion and new special schools; Ensuring that disabled children receive an inclusive education demands a multisector approach; inclusive vision of lifelong learning; the opportunities that exist for lifelong learning owe much to the development of a comprehensive and inclusive education and training system and significant investment in human capital;
	active, collaborative, experiental learning	Participatory; group-based; interactive; communicative; action-based; accreditation of prior and experiantal learning (APEL); inclusive; mixed-age; teachers and trainers as guides, mentors and mediators; independent learning; cooperative learning; limiting the teacher's role to one of managing the learner's acquisition of knowledge
	coherent, conceptual, contextual learning	Transversal skills; key competences; reduce the importance of cramming the educational curriculum with subject matters and details; transfer; merging general education and TVET;
	optimizing learning through neuroscience	Loss of language capacity in damaged adult brains after strokes; cardiovascular fitness increases brain connection activity; emotions and learning; motivation;
	optimizing learning through pharmacology	Extending use of therapeutic drugs that improve memory, attention and energy for human enhancement ;
Code family IV: Governance		
actors believed to be involved in LLL implementation	individual learner	Qualities such as teamwork, reliability, discipline, or work effort, enterprise, risk-taking, skill, and agility; healthy; creativity, initiative and responsiveness; reduced risk behavior; actie, fittness; , LLL knowledge, attitude, value; motivated; cognitive and creative and emotional abilities to their full potential (AU); leadership, entrepreneurship and business skills; spirit of volunteerism and social responsibility; preparation and empowerment of the learner to master the tools of knowledge and build an all-able personality, and through teaching the learner how to learn; the availability of sufficient human talent and people's attitudes towards the value of science and entrepreneurship depend upon providing top-quality education systems at all levels from primary school to higher education and on achieving effective public debate on these matters. Universities must be challenged to provide the right talent for the future; steps taken to improve mobility; labour laws made more flexible; and risk taking encouraged; autoempleo; Specific psychological

		traits are associated with entrepreneurship, such as a personal need for achievement, a belief in the effect of personal effort on outcomes, selfconfidence, and a positive attitude toward risk; such as a sense of responsibility, an entrepreneurial attitude and the ability to take advantage of change. […]Motivating students to accept change and continue learning throughout their lives should be expressed as a basic curriculum principle; For the individual, lifelong learning emphasises creativity, initiative and responsiveness – attributes which contribute to self-fulfilment, higher earnings and employment, and to innovation and productivity;
	teachers	Motivating students to continue learning throughout life should be expressed as a basic curriculum principle. Early and continued familiarisation with ICT is essential for students, employees and teachers; Opportunities for head teachers, business, educationalists and government to work together to promote and develop policies to deliver life-long learning; including information from teachers to enrich the context of PISA data; The report says that "the implications for teachers' work include a greater sense of "managerial" (professional) responsibility for curricula development and change, teaching approaches, work organization and learning outcomes."; importance for schools and teachers to be able to engage constructively with heterogeneity not only in student abilities but also in their characteristics as learners and their approaches; The teachers and all educational personnel must serve as role models of lifelong learning behaviors and help to facilitate conducive learning environments within the school, the home and the communities; Lifelong learning should be relevant to the work of teachers. It should reflect teachers' needs and help them to improve the quality of the school system; In the old model of learning, teachers told learners what they needed to know. In the new learning environment, teachers and trainers work as acilitators, enabling learners to access knowledge and develop their conceptual understanding. Creating this new environment requires a change of culture, especially where teachers' status in the classroom and society arises from being perceived as an authority figure; designing personal learning plans; tutorial relationship with teachers; from provider of knowledge to tutor and facilitator; part of catering for QF;
	state	State; government; local government; national government; regional government; Lifelong learning is the responsibility of government, employers and employees/individuals.Government can encourage further training by offering incentives for investment while, at the same time, accepting a special responsibility for those who never reached the first level of vocational qualification in the initial education system. Public strategies in adult training must above all be targeted at those at risk; The responsibility lies with public policies and should not be left to the individual alone; Government has a principal role in funding disadvantaged groups, including people with disabilities, youth, the unemployed, low skilled workers and women; Government and other agencies over the years to improve access, financing and the provision of infrastructure and facilities at all levels; In the early childhood education area, a pro-active stance from government is needed to avoid developing a two-tiered system consisting of wellfunded infrastructures for the upper income groups coexisting with poor quality facilities for the children from disadvantaged groups; Government retains the primary responsibility for access to and equity in lifelong learning in all forms and at all ages, whether the opportunities are afforded through the market or provided directly by the government; Setting and assessment of goal and standards; assuring quality; steering governance between schools, parents, enterprises; ensuring a fair distribution of resources; A major focus of a government's policy for lifelong learning, therefore, must be improving the ability of disadvantaged groups and those with low educational attainment to access learning; a project for the private sector is best managed by the private sector with government at best playing a facilitating role; management of basic education; transfering resources from the government to companies so that they can provide advanced training courses; governments are crucial in ensuring access to, and the quality of, formal education;Overall rates of public and private investment must be raised. Such increases should be based on shared responsibility between government, public authorities, employers, social partners and individual citizens; funder; promoter; facilitator; coordinator; supporter; The bottom line is that governments have the ultimate responsibility to ensure that everyone has access to basic education systems of acceptable quality. Discharging that responsibility effectively means different things in different places, but it invariably requires placing a premium on the equalization of opportunity across the education system; ownership; provision; governments by investing and creating the conditions to enhance education and training at all levels; Ensure that governments ensure adequate financing of lifelong learning, theresponsibility cannot be left to the individual;
	community	provision of LLL; community education;
	schools	the important role that schools could and should play in supporting teachers' lifelong learning; The inevitability of lifelong learning in knowledge-oriented

		societies implies that school systems should have different objectives and characteristics than if education were considered to have been completed when a student leaves initial education; community learning centers; The formal school system, however, must be transformed to serve the goal of lifelong learning, striving to guarantee not only access but meaningful, relevant quality learning experiences for all. In particular, self-directed learning competencies and the culture of lifelong learning must be given priority in the curriculum; preparation for LLL; to give more autonomy to schools as they develop a base for community life-long learning; open learning centers;
	NGO : trade unions	To promote a lifelong learning culture, both trade union and employer organisations have a key role to play in informing, supporting and advising their members and need to develop in house expertise to perform this role; negotiating, bargaining, campaigning for LLL; Career development and lifelong learning provide leverage for developing trade union strength and organising; Although modest, experience shows that active union involvement in training activities and providing individual services promote an added value to union membership and result in membership gain; Support for long-term employability, promotion of skills development and lifelong learning
	employers	as well as recognizing the role of the social partners in further training, in particular the vital role of employers in providing work experience opportunities; Essential obligations of the employer;
	parents	Financing ther children; key stakeholders; more decision-making; design and funding of educational programs wherever possible;
	donor/ international community	Closer collaboration is needed between the ILO, UNESCO and other international organizations; regional organizations, such as the EU and MERCOSUR;
	NGO: business associations	Professional bodies; To promote a lifelong learning culture, both trade union and employer organisations have a key role to play in informing, supporting and advising their members and need to develop in house expertise to perform this role;
	NGO: other or unspecified	International Association for the Evaluation of Educational Achievement, the International Association for Educational Assessment, and the International Reading Association; Religious NGOs; philantropic NGOs; donor NGOs; foundations; other NGOs; Financing; greater engagement; enrance donor agency awareness that their own prac- education system. Institutional capacity is weak.t7ces shouid be adapted to the needs of national prograrns and to develop a consensus among minis- Objectives. The Bank supports the priority of all the ters and agencies on approaches to the major issues South Asian governments: basic education, i.e., facing education in Africa; s well as government and non-governmental associations, unions and organizations, should join efforts to meet the Education for All needs and goals; types of providers: private industry, social partners, civil society, international non-governmental organizations
	market-based service provider	private publisher of school books; privately owned schools; privately-owned schools;
funding **mentioned but not recommended are:**	pre-primary education: PPP	Development of partnership arrangements with NGOs, cooperatives, national and local level institutes, and civil society organizations for the financing of ECED; s. In both rich and poor countries, parental income and education heavily influence who attends pre-school programmes, pointing to the need for greater equity in public provision and financing; include supply-side incentives created by a combination of public funding and non-public provision of schools; Improve funding for early childhood sector by developing and implementing a strategy that encourages publicprivate partnerships;
	free public primary education	All governments and international agencies (i.e. the International Monetary Fund (IMF) and the Wo rld Bank) must take actions to eliminate all economic and social causes to exploitation of child labour, including guaranteeing compulsory and free primary education; Provide free and compulsory basic education and take steps to minimise the indirect costs of education; have access to and complete, free and compulsory primary education of good quality;

Single-employer financing; Self-financing model; individual learning account; time account;	Post-compulsory education: PPP	Entitlement model; franchise model; savings/ learning account; tax credit; income contingent loans; Time accounts; savings/ learning accounts; Para-fiscal funds model; tax deduction; Interest rate subsidy; income contingent loans; Transferable training loans; Auction plans (university-state); Different examples demonstrate that new private providers may, if certain conditions are met, enhance the capacity to meet unmet demand for higher education in countries with decreasing state budgets; We support the efforts of governments of the hemisphere that are exploring innovative ways to mobilize financing for public and private investment in education; public/ individual - employer/ individual - public/ employer – public/ employer/individual - public/ individual/ bank market – employer/individual/banks - public/public; assurance companies; microcredits; microloans;
	level not specified:	
	international community (incl. debt relief/ swapping)	But in addition targeted donor support seems unavoidable, at least temporarily, until national education systems can absorb the cost.Education and vocational training must be supported through international agencies including through linking debt relief to a higher priority for education; as part of creating the conditions for skills formation in the least developed economies, undertake bold and substantial debt relief; HIPC Debt Initiative; In that sense, we note with interest the advances made since our last meeting in the definition of mechanisms that allow debt swaps for education in the region;
	supranational	the project is financed by Leonardo da Vinci;
ownership	public	strengthen national ownership of international aid for education; the need for developing countries to take ownership of technical and vocational education and to increase their budget for this sector of education; strong government ownership of education sector policies, channelling of aid into government sector; country owner ship; Paris Declaration in Aid Effectiveness; the country in the driver's seat; while the ownership of smaller schools in rural areas could be transferred to local governments; The ILO/IPEC/PAMODEC project has three main priorities, namely prevention, removal and protection, and emphasizes education, capacity building and national ownership; Ownership by the recipient country is essential
	community	There should be community ownership of non-formal learning centres and the gradual phasing out of the project mode; empower people to take ownership of their own sustainable development processes; community stakeholder ownership;
provision	PPP	
	employers	enterprises by training their employees;
	public	Governments and intern ational agencies have a key responsibility to ensure adequate education and vocational training opportunities for young people; assume the primary responsibility for investing in quality education and preemployment training;
	NGOs	the primary education system in Haiti is delivered largely through religious organizations and other NGOs;
	IOs	IGOs; regional development banks; UN bodies; Governments and intern ational agencies have a key responsibility to ensure adequate education and vocational training opportunities for young people; the ILO should facilitate the access of developing countries and economies in transition to the new information technology, particularly through the provision of technical assistance in training and advanced training on content
	professional bodies	International Association for the Evaluation of Educational Achievement, the International Association for Educational Assessment, and the International Reading Association
	private foreign	Creation of legal regulatory framework that * Strong legal basis to promote education and creates level playing field between public lifelong learning: Brazil (1996 Education Law) and private providers; to facilitate cross-border exchange and investment in higher education; privately owned schools;

costs	collective	Raising participation in pre-school, upper secondary and teriary education; number of poorly qualified adults; participation of poorly qualified adults; indirect costs of aggregated foregone earnings; expanding LLL at education before the age of three; adult education activities in formal education institutions outside degree programs; updating and upgrading the knowledge and know-how of highly qualified personnel; labor shortages; early retirement; economic dependency of elderly;
	individual	foregone earnings/ lack of time; direct costs of training and schooling;
reforms aiming at	decentralization in educational system	l'appui à une gestion décentralisée de l'éducation; de-concentration; increase in local autonomy; more local decision-making autonomy; budgetary decentralization; fiscal decentralisation;
	recognition of prior (informal/non-formal) learning	system of certification of skills; Every person should have the opportunity to have his or her experiences and skills gained through work, through society or through formal and non-formal training assessed, recognized and certified; articulation, accreditation and recognition of prior learning; common principles for the recognition of prior learning; validation of acquired experiences; A learning certification system needs to recognize nonformal learning; recognition and certification of informally acquired competencies, and consciousnessraising for lifelong learning;
	mobility through harmonization	(national/ international) qualification frameworks; Gambia Skills Qualification Framework; Namibia NQF; harmonisation of labor markets; promotion of manpower migration and integration in the region; permeability; transition; Particularly important in this context is permeability – facilitating access between VET and higher education;
	education system flexibility	Flexibility is the main criterion used which is of interest to this report. This is understood to mean that buildings or grounds are adapted to new forms of learning and research; institutions that make special use of information and communications technology; or special educational facilities. Characteristics include transformable learning spaces, student-centredness, problem-based learning facilities; by providing flexibility in programme administration and curriculum design to facilitate smooth lifelong learning; Are youth and adult learning programmes highly standardized, or do they incorporate flexibility so as to better address the learning needs of diverse groups?; flexibility of delivery; and increasing the flexibility of formal institutions so that more students with diverse education and social backgrounds can benefit from them; curriculum flexibility; the flexibility in standards for organizing classes; ICT provides flexibility;
	work place flexibility	New time arrangements; tele-working; work-life-balance; leave arrangements; In order to exploit unused reserves of flexibility, companies should be able to agree working time volumes with individuals; Workers need flexibility to adapt their working life with family responsibilities; specific bargaining issues, such as working time, flexibility, life-long learning, new work contracts, outsourcing, etc.; limited flexibility in these programs precludes the employees from combining work with education and training; more innovative working time arrangements, such as working time accounts, can help secure working-time arrangements that promote lifelong learning;
	labor market flexibility	Wage flexibility; This link between paper qualification and status, however logical it may be,accentuates the internal lack of flexibility of the labour market; The current structure of education and training institution must change to meet the needs of different groups. These institutions remain too rigid to educate and train citizens or workers for permanent employment.
	non-formalization of education	the growing need for the formalization of non-formal and informal learning, as well as the non-formalization of formal learning curriculum needs to be recognized
Code family V: epistemic family – meanings, contexts, form		
LLL as	labor policy/	Lifelong learning and development of competences and qualifications; Putting into place effective active labour market policies and lifelong learning

	active labor market policy	systems fostering employability and labour market integration; linked with active labour market policies, comprehensive lifelong learning, and modern social security systems that activate;
	development cooperation	our trade union development cooperation and education activities; worker-friendly training and retraining programmes, as well as lifelong learning, in particular to respond to the imperative of narrowing the digital divide, and ensure equal and affordable access to them for all workers; Building and harnessing the life and work skills, values, and attitudes of young adults should be a cornerstone of development policy.; Key social and economic development measures as follows:Education and lifelong learning environment established to support use of ICTs at levels of community, business and government;
	social policy	Active Aging as a Key Ingredient for More Successful Social Policy; Although educational policy cannot offer solutions by itself, there is a growing realisation that education, training and continuing learning more generally have a major role to play in complementing existing social insurance provisions; There is the "active policies" argument for lifelong learning, which picks up and extends the theme current in much economic and social policy;
other initiatives referred to	EFA	Education for all; fast track initiative; it supports the achievement of EFA goals related to academic achievement, gender equity and life-long learning;
	MDG	Objectifs du millénaire pour le développement;
	Bologna	European Single Education Area;
"models"	"World Bank model"	WB education system performance indicators; rapid social response programme; According to the World Bank, 50 per cent of the world's out-of-school children live in communities where the language of instruction in school is rarely, if ever, used at home; STEP framework Skills Towards Employment and Productivity; In the recent past, the World Bank and IADB's analytical work related to PFM was used by the EC and others as the basis for their programmes; Life in Transition Survey (LiTS); World Bank (2002) report on tertiary education; Non formal education as conceptualised by the World Bank; National Vision 2020 and the Poverty Reduction Strategy Paper (World Bank, 2005);
	"Scandinavian model" (Finland, Sweden, Norway, Denmark)	In Sweden, government drives the effort for gender equality in early childhood; Sweden has proposed creating ILAs in which learners and employers deposit funds for competency training; Sweden provides better lifelong learning programmes; Chart 3.14 suggests that the transition countries have a higher proportion of social science graduates at tertiary level than the OECD average and some selected comparator countries (such as Sweden); High performing countries such as Finland and Sweden; For decades Finnish education policy has focused on improving the overall level of education and ensuring equal access to lifelong learning for all groups in all regions of the country;
	"EU model"	European Area of LLL; European approach to LLL; This policy goal was identified by a meeting of OECD Education Ministers in 1996 (Lifelong Learning for All, OECD, 1996) and also echoed in publications by UNESCO and the European Commission; The EC defined the knowledge society as supporting lifelong learning, creativity and innovation, and identified the main challenges posed by digital convergence;
	"UNESCO model"	The Commission also consulted various international organisations, in particular the Council of Europe, the OECD and UNESCO; This policy goal was identified by a meeting of OECD Education Ministers in 1996 (Lifelong Learning for All, OECD, 1996) and also echoed in publications by UNESCO and the European Commission; Support for recognition, validation and accreditation of nonformal and informal learning can be gained from the UNESCO Institute for Lifelong Learning;
	"dual model"	The principle of a dual system is to alternate between learning in school and working in a company; the German dual system; Some countries combine school-based and work-based training in dual systems, integrating apprenticeships into the formal education structure. OECD countries that typically offer this option include Denmark, Germany, Switzerland and, more recently, Norway (OECD, 2007a). The well-known German dual system, which has been

		widely copied in developing countries, creates opportunities for students to combine school-based classes with in-company training; dual system is credited with fast and structured employment integration; Austria, the Czech Republic and Finland report that VET has a strong, positive image in their countries explained by the tradition of a dual system; In Germany for example the dual system encompasses many aspects of a learning outcomes approach already;
	"OECD model"	OECD Education at a Glance; the OECD (2000d) argues for increasing the benefits and reducing the costs of education so that individuals, enterprises, and societies invest in lifelong learning; , the description and definition often used by the OECD captures the essence of adult learning; The Commission also consulted various international organisations, in particular the Council of Europe, the OECD and UNESCO;
	"Chilean Model"	noteworthy Chile; because of its solid education system and its progressive advances in the field of ICT and education;
	Asian model of LLL	The Yi Jing as a Paradigm for Attitudes Toward Lifelong Learning; The Kaizen Spirit as a Model for Lifelong Learning The Asian perspective of lifelong learning can be described by 3 aspects: 1. Learning the self, 2. Learning the family, 3. Learning the universe
related concepts	knowledge economy	LLL for the knowledge economy; LLL has become crucial in the KE; knowledge-intensive economy; within the context of a global knowledge-economy;
	sustainability/ green economy	Sustainable societies; sustainable economies;
	European social model	This is why the Lisbon European Council confirmed lifelong learning as a basic component of the European social model.
LLL as	human capital	the importance of human capital as an essential factor in guaranteeing positive economic and social outcomes; Improving the contribution of the education system to human capital; There is a broad consensus among governments, trade unions and employers, that investment in human capital is a key to the future; strong incentives for investment in human capitalfor both individuals and firms; adult education as a means of building human capital to adapt to new and changing circumstances arising from globalisation and technology ; LLL human capital contracts, à augmenter leur capital de connaissances et de compétences; ensure its future competitiveness by investing in human capital; human capital through education; mobility on the labour market, development of human capital and life-long learning; g to set a national strategy for lifelong learning, development of human capital, raising the level of skills; Lesotho will serve as a service country exporting human capital; This has links to the fulfillment of the economic goal of the OECS mission - to create to more knowledge-based economy by providing more human capital; capital humain; capital humano; rendements; returns on investment; investment in human capital;
LLL as	concept	promote the lifelong learning concept; The concept of lifelong training implies that every employee becomes an actor in his training course, his professional career and his career development; within the concept of lifelong learning; These lessons have been translated into the more encompassing, long-term concept of continuous professional development or lifelong learning; moving towards the concept of LLL; To realize the concept of lifelong learning and to increase the country's competitiveness in the global economy; that lifelong learning should be viewed as an overarching concept covering all systems (formal, non-formal) and levels (pre-school, primary, secondary, higher, adult, continuing) of education and training; Open schooling resonates well with the dynamics of the 21st century when the concept of lifelong learning will under pin all education and training;
	system	redesigning systems for lifelong learning; Restructuring of the system of studies in public higher education institutions in three cycles and lifelong learning; crafting a qualifications system for lifelong learning; Link formal and non-formal education for mainstreaming the marginalized groups into a lifelong learning system; The demands of a lifelong learning system are enormous; (seamless system catering to lifelong learning needs; keeping in mind

		that defining lifelong learning as a 'system' is a challenge in itself;
	strategy	Pursue a LLL strategy; drafting of the national LLL strategy; lifelong learning as an educational strategy; as a key strategy to attain social inclusion and inclusive education systems; The key messages suggest that a comprehensive and coherent lifelong learning strategy for Europe;
	framework	to create the framework for lifelong learning; European Qualification Framework for lifelong learning (EQF); The lifelong learning framework views the demand for, and the supply of, learning opportunities, as part of a connected system;
	approach	The lifelong learning approach suggests a broader conception of foundation learning;
	vision	Thailand is one of the countries that have pursued the vision of lifelong learning; In particular, UNESCO leads the global Education for All movement, and promotes a holistic and inclusive vision of lifelong learning that includes early childhood care and education, primary, secondary and higher education, youth and adult skills, adult literacy, gender parity and quality education; to develop an effective lifelong learning system that starts with a vision of lifelong learning. Its lifelong learning strategy; But, the Asians see lifelong learning leading to a high vision of a ideal society; the vision of lifelong learning for all;
	model	A model of LLL;
	policy/ policies	develop policies to deliver life-long learning; A policy of lifelong learning needs also;
	paradigm	within this lifelong learning paradigm, the sources of nonformal education become larger and more diversified; a brief outline of the LLL paradigm;
measuring LLL	indicators	Much international information is available that can help countries benchmark their performance, both in terms of inputs (unit costs of education and training, student-teacher ratio, teaching time in learning activities) and outputs (learner assessment); International assessments,such as the Third International Mathematics and Science Study (TIMSS), the International Association for Evaluation of Educational Achievement Citizenship and Education Study (CES), the Programme for International Student Assessment (PISA), the International Adult Literacy Study Survey (IALS), and the new Adult Literacy and Lifeskills Survey (ALL); Adoption of national standards and accreditation system; partipation ad improvement of learners; adult performance in assessments that measure new skills; adoption of learner-centered education practices; alignment of quality control mechanisms to implement learner-centered pedagogical practice; increase in flexible delivery of learning opportunities (ICT); changed quality assurance mechanisms; (certification); improvement in articulation between different types of learning and recognition of informal learning; competency-based assessment and qualification; policy deepening linkage between education and labor market; increase in degree of administrative and financial decentralization and participation of stakeholders in decision-making process; increase in degree of openness within a country and toward international community; decline in inequity between and within countries through policy measures; adoption of sound education management system within monitoring and evaluation system (focus on outcomes); improvement in accountability and transperancy (e-government); creation of legal regulatory framework the creates level playing field between public and private providers […]; increase in share of total education resources; use of traditional loans, human capital contracts, graduate tax, income-contingent repayment loans; use of vouchers, entitlements, individual learning accounts, education savings account, learning tax credits; devrease in direct administration and increase in subsidies in certain types of learning; The learner-centred orientation of lifelong learning is radically different from the institution-centred approach inherent in data collection pertaining to the formal education system; 1.Literacy, 2. Numeracy, 3..New Skills in the Learning Society, 4. Learning-to-Learn Skills, 5.Active Citizenship Cultural and Social Skills Area B: Access and Participation 6. Access to Lifelong Learning 7. Participation in Lifelong Learning Area C: Resources for Lifelong Learning 8. Investment in Lifelong Learning 9. Educators and Training 10. ICT in Learning Area D: Strategies and System Development 11. Strategies of Lifelong Learning 12. Coherence of Supply 13. Counselling and Guidance 14. Accreditation and Certification 15.Quality Assurance; initiating regional monitoring mechanisms with clear benchmarks and indicators; There is a need for research on the best way to relate national qualifications systems to lifelong learning through quantitative variables;

		Member countries need to draw on lifelong learning as a framework for sustainable development, and need to come up with their own benchmarks, milestones and indicators for sustainable development; Participation of adults in education and training; graduate employment rate, • percentage of graduates with jobs using skills and knowledge acquired from their SSE programs, • transition rate to higher education ;
inconsistencies	educational expansion trade-off or general vs. TVET	Increase in HE and improving the attractiveness and relevance of VET; At present, formal education systems may still not be sufficiently relevant to the needs of industry, Support to general education aimed at an improvement of employability opportunities of graduates has not reduced the rates of unemployment of school leavers, because general education is expected to prepare access to higher education. Part of the unemployment problem is linked to the TVET system, which is still underdeveloped in Tunisia, and the capacity of the Tunisian economy to create the ap-ity of the education system; The ETCG since 2005 has brought together the various strands of E&T 2010, including both general education and VET within a lifelong learning perspective; When questioned about the shape of the school curriculum of the future, leading business executives outlined a broad humanistic educational philosophy. Far from seeking vocationally trained specialists, or wishing to see schools concentrate on a limited set of basic skills, they advocated a modern liberal education, structured around three key learning areas: mathematics, science and technology, the humanities; economics and social sciences, forming the basic chain extending from pre-school to adult education.
	Lack of evidence of positive impact	Research assessing the link between the quantity of education (in terms of enrollment or average years of schooling) and economic growth has been encouraging but somewhat mixed, perhaps because ultimately what matters for growth is not the years that students spend in school, but what they learn; At present, the relationship between resources and the quality of lifelong learning remains unclear. cadre or mass education; Most educational policy makers believe that there is a link between qualifications systems and lifelong learning; however such a link has never been proven; The share in value-added high-technology industries has increased […], in some countries more than in others. Although causality cannot be inferred, this points to a positive relationship between skills, technology, innovation, productivity and competivity."
	"Taylored menus"	the need for developing countries to develop their own sets of indicators which are specifically tailored to their information needs, sustainability priorities, and national frameworks and strategies of their own country [..]. In their recent National SCP Guidelines, UNeP (UN Environment Programme) notes the general inadequacy of national efforts to measure progress on SCP policy and programme implementation. Developing countries need to overcome a variety of institutional, technical and political constraints when developing SCP indicators, such as inadequate resources, data reporting units, monitoring networks, and lack of political willingness. UNeP has developed a guidance framework to assist developing countries in measuring their achievement towards SCP objectives; The concepts and strategies presented in this document apply to all countries, however due to variations in resources and needs, programmes should be tailored according to the circumstances prevailing in each country
	Direct evidence of decoupling	The display of school budgets clearly has ushered in a new era of openness but, on close inspection the budgets were nearly identical from school to school and the information in them was generally nothing different from that already widely known; corruption pressures at local levels augment among municipal officials, councillors and mayors most probably related to the process of decentralization; A second problem is that monitoring and reporting procedures were not established until the ODA project was almost complete. During this period, NFED wass so understaffed that it operated on an emergency basis, trying to cope with the massive expansion in numbers of classes with very limited resources and staff. No attention was given to reporting and monitoring.
	Standardized measurement good or bad?	Standardisation within countries […] has been further reinforced by the introduction of national assessments of student performance and, in certain countries, standardised examinations leading to recognised qualifications […]. Standardised achievement tests […] are at odds with the "cross-curriculum" skills most sought in a framework for lifelong learning: motivation and self-confidence; social and communication skills; self-managed learning; and capacity for independent information search, retrieval and analysis.As it stands, the standardisation of school learning, and testing, can be at cross-prupes with the cherished ideals of diversity, individualisation and, in the long run, incentives to learn.„There is currently a danger that what can be most reliably assessed will become the criterion of quality.

	LLL to "prepare" for unemployment	LLL guidance should take into account the needs of industry, the individual and the family while preparing students and adults for the real possibility of frequent career changes, which could include periods of unemployment and employment in the informal sector; significant non-work
	Who's failure?	seeing non-participation not as an individual failing but as a result of structured conditions affecting individuals in manifold, complex ways; They need to be able to take responsibility for their own continuing, life-long learning. there is an increasingly widespread view among policy makers and social partners that individuals will need to take greater responsibility for their own lifelong learning in the future, including in bearing an increased share of the costs in certain cases;
narrative elements	time	Mankind will not survive its food, economic and ecological crises, nor the impact of its inevitable cultural multiplicity, unless all of the world's citizens have the space and resources to learn new ways of producing and living together. And this sustained growth in productivity through the continuous renewal of knowledge and skills is also what we call adult education; More must be done to ensure the efficient operation of the single market, notably by streamlining and rationalizing rules and regulations so as to make easier to establish new forms of labour organization and to move away from Taylorism; In 21st century education, e-learning (education through digital media) has given rise to personalized learning environments (PLE). This is a response to the necessity of lifelong learning, as well as to the challenge of responding to youth that have dropped out of the educational system and face difficulties in their school life; In the 21st century, socio-economic forces push the lifelong learning approach. The changing nature of work as a result of globalization and technological change emphasize the need for continual upgrade and change of life skills throughout life.
	identity	Countries and world regions may have differently balanced priorities in adult learning and education, but they are united in seeking to improve the quality of life and in the recognition that there is a global dimension to all the challenges we face in the coming decades; It is closely related to democratic citizenship and the aim is to provide a smooth transition from local, regional and national frameworks to the European level, leading finally to a perception of being a world citizen; the purpose being to strengthen the pan-Arab sense of belonging and feeling […] supporting national identity with universal identity in an interdependent world; Every young person shall have the right to social, economic, political and cultural development with due regard to their freedom and identity and in equal enjoyment of the common heritage of mankind; OECS Education Reform Unit (OERU) aims at Instances in which the explicit or implicit goals are to foster regional integration, promote regional collaboration, build regional identity or establish common regional standards or some combination of these; education for global citizenship;

Appendix C.3: Concept/category system with references

Explanatory note:

References are selected on the individual organizational level, that is, a given organization can have more than one (the included) document referring to the category, yet only one is provided in the list. A minimum of one reference in a minimum of one document is a necessary condition for inclusion into the category or concept. The categories themselves are comprehensive in that they encompass a word family or semantic field as presented in Appendix C.2 under in-vivo codes. No page reference is given when the entire document is dedicated to the category.

Table C.3: Concept/category system with references

Categories	Concepts	References by categories	N org referring to cat (total n=59)	no.
		Code family I: causes, conditions, consequences		
causes	socio-economic	ECOSOC (2006:9); ILO (2004:1); IMF (2006:78); OECD (2007a:2); UNICEF (2011:7); UNESCO (2009:48); UNIDO (2007:15); WB (2011b:54); WHO (2006:xxi); WTO (2007b:7) – AU (2012:7); APEC (2009:9); CoL (2012b:14); EU (2011b:10), PIF (2005:8); OECS (2000:35); LAS (2008:160); SAARC (2007a:vii) – AFDB (2004:13); IADB (2003:1); EBRD (2008:180) – GIZ (2011c:1) – ICFTU (2000:364); BIAC (2005:4); UEAPME (2003:9);	25	I.1
	legal (human rights)	ECOSOC (2011:14); ILO (2013:450); IMF (2008:18); UNESCO (2007a:18); UNICEF (2012:173); WB (2011b:95); AU (2006:8) – EAC (2009:32); EU (2001:23); EURASEC (2008:2); LAS (2008:182); OAS (2005a:63); OECS (2007:4); PIF (2009:5); SAARC (2010c:41) – ADB (2009:67); CoEDB (2006:17) – AECID (no date:3); AFD (a no date:1); DFID (2011b:20); EuropeAid (2010b:72); JICA (2010a:23) – IMWF (2009:47);	23	I.2
	demographic	ECOSOC (2006:16); ILO (2005:3); IMF (2012a:14); OECD (1996:35f.); UNESCO (2009:42); UNICEF (1995:12); UNIDO (2008:4); WB (2013:51); WTO & ILO (2011:289) – APEC (2004:8); EU (2001:3); OECS (2010:10) – IADB (2003:1); AFDB (2007b:15); CoEDB (2006:8) – BIAC (2003); BusinessEurope (2012:6); UEAPME (2004:30); EI (2012:78); ETUC (2006:25); IMWF (2006:41);	22	I.3
	techno-economic	ILO (2000:2); OECD (2007a:2); UNESCO (2011a:19); WHO (1998:207); WB (2003b:105) – APEC (2010b); BSEC (2007:1); CARICOM (2011); EU (2001:3); PIF (2012); SAARC (2007a:44); OECS (2002:10) – AFDB (2004) – BIAC (2001b:45); ERT (2001:8); UEAPME (2003:11); UNI (2009:13);	17	I.4
	socio-cultural expectations	UNESCO (2000:65); UNICEF (2011:14); WB (2011b:25) – LAS (2008:131); SAARC (2010a:45) – USAID (2005:4) – ETUC (2006:6); UEAPME (2001:1); EI (2012:53);	9	I.5

	work place flexibility	ILO (2004:5); UNIDO (2007:22); OCED (2004c:14)– ASEAN (2010:84) – ETUC (2006); ICFTU (2002:3); IMWF (2004a:20); UNI (2009:13);	8	I.6
	ethno-cultural diversity	EU (2000:5);	1	I.7
goals/ benefits/ expected outcomes (educational increase and access is taken for granted)	individual: empowerment	ECOSOC (2006:8); ILO (2013:509); IMF (2012b:93); UNESCO (2011b:34); UNICEF (2011:26); UNIDO (2008:17); WB (2003b:58); WHO (2007:36) – APEC (1999:3); ASEAN (2009:75); AU (2006:2); CARICOM (2011:37); CoL (2012a:17); EAC (2009:66); EU (2011a:127); EURASEC (2008:2); LAS (2008:32); PIF (2012b:3); SARC (2010c:21); SADC (2007:80); OAS (2001:34); OECS (2007:24) – ADB (2009:70); AFDB (2008b:1); IADB (2013:1); IDB (2006a:33) – AECID (no date:16); AFD (2006:19); DFID (2011c:13); EuropeAid (2010b:176); GIZ (2012a:25); JICA (2011b:24); SNV (2012:5); USAID (2011:1) – EI (2012:46); IMWF (2009:41); BIAC (2011:4);	37	I.8
	collective: economic	ILO (2000:2); IMF (2006:78); UNICEF (2011:7); UNIDO (2007:15); OECD (1996:40); WB (2011b:54); WHO (1998:207); WTO (2007b:7); UNESCO (2000:18) – EAC (2009:35); ECOWAS (2009:1); EU (1995b:1); LAS (2008:165); OAS (2001:29); OECS (2002:8); SAARC (2007 :1) – ADB (2007: 16); AFDB (2007c:19); CoEDB (2012a:19); EBRD (2008:61); IADB (2009:1); IDB (2006a:37f.) – AFD (no date a:1); DFID (2011c:4); EuropeAId (2002:6); GIZ (2011c:1); SNV (2007:12); USAID (2003:61) – EMWF (2012:2); BIAC (2001:5); ICC (2012:5);	31	I.9
	individual: employability	ECOSOC (2006:9); ILO (2004:2); OECD (2007a:6); UNIDO (2007:15); UESCO ((2012:28); WB (2012:36) – APEC (2004:3); EU (2012:6); OAS (2001:30) – CoEDB (2012b:31); EBRD (2011:5) – DFID (2011c:4); EuropeAid (2006:2) – ICFTU (2005:2); IMWF (2004:94); UNI (2008:54); WFTU (2004b:9); BIAC (2011:4); BusinessEurope (2012:5); ERT (2001:6); UEAPME (2004:58);	21	I.10
	collective: social cohesion	ILO (2000:2); IMF (2008:69); OECD (2004c:4); UNESCO (2010a:78); UNICEF (2011:7); WHO (2001:40); WB (2011b:25) – APEC (2004:7); EU (2005:73); PIF (2009:6); SAARC (2010a:14); SADC (2007:29); OAS (2001:29) – ADB (2009:71); AFDB (2007a:5); IADB (2009:1) – EuropeAid (2010c:12); USAID (2006:1) – EI (2009:1); ETUC (2006:7);	20	I.11
	individual: capacities/ potential	ECOSOC (2011:12); ILO (2004:1); IMF (2012b:74); UNICEF (2011:7); UNESCO (2011a:5); WB (2003a:56) – APEC (2004:1); ASEAN (2009:68); EU (2011a:123); LAS (2008:7); OAS (2001:29); SAARC (2007b:69); OECS (2000:44) – AFDB (2004:1); ADB (2009:67); IDB (2006a:30) – DFID (2011b:20) – EuropeAid (2010b:6); USAID (2003:23);	19	I.12
	individual: personal development	OECD (2007b:10); UNESCO (2008:3); UNICEF (2011:30); WB (2003b:96); WHO (2007:34) – APEC (1999:213); EU (2011b:12); PIF (2007:15); SAARC (2012a:52); SADC (2007:15); OAS (2005:57); OECS (2012:39) – EuropeAid (2010b:159); SNV (2007:27) – ETUC (2006:15); IMWF (2006:113); ERT (2001:6); UEAPME (2004:50);	18	I.13
	collective: values	IMF (2012b:74); UNESCO (2000:65); OECD (1996:103) – AU (2006:8); CAN (2008:1f.); CARICOM (2009:1); CoE (2007:2); EU (1995b:11; 2011a:128); EURASEC (2008:APPENDIX II-2); LAS (2008:9); OAS (2001:30);	11	I.14
	other: identity formation	OECD (1996:121); UNESCo (2011a:23); AU (2006:8); ASEAN (2011:3); EU (2005:58); LAS (2008:40 & 182); OAS (2012:79);	6	I.15
	individual: health	UNESCO (2011a:13); WHO (2001:45); WB (2011b:13) – AFD (no date a:1); EuropeAid (2002:6);	5	I.16
	collective:	EU (2001:7); SICA (no date:12) – USAID (2005:15)	3	I.17

	public security			
	individual: lower child mortality	UNESCO (2011b:93); WB (2011b:13);	2	I.18
	individual: lower fertility	WB (2011b:13); AFD (no date a:1)	2	I.19
	individual: environmently-friendly behavior	WB (2011b:13); AFD (no date a:1);	2	I.20
	other: economic nationalism	USAID (2003:61; 2005:15);	1	I.21
(pre) conditions	anticipation of labor market needs	ECOSOC (2006:9); IMF (2006:78); OECD (2007a:3) – CARICOM (2009:6); EU (2007b:110); SAARC (2007a:44); OECS (2000:10) – EBRD (2008:61) – GIZ (2011c:1) – EPSU (2011:17); UEAPME (2003:56); BIAC (2001b:45); BusinessEurope (2012:3);	13	I.22
barriers	traditional culture	ILO (2013:478); UNESCO (2011b:105); IMF (2009:33); WB (2013:15) – LAS (2008:36); SAARC (2010c:40) – ADB (2009:36); AFDB (2007b:33) – EuropeAid (2006:18); USAID (2005:5); JICA (2011b:7); IMWF 2005b:224) – LAS (2008:36) – AFDB (2007b:5f.) – (JICA 2011b:28; herein ADB quoted)	14	I.23
	lack of LLL “culture“/ attitude/ motivation	ILO (2000a:1); IMF (2013:42); UNESCO (2009:73); WHO (2006:88); WB (1999:iii) – EU (2001:4); CARICOM (2009:6) – EuropeAid (2010c:263) – UAPME (2003:68);	9	I.24
	low quality in education	ECOSOC (2011:12); IMF (2012b:74); UNESCO (2007b:35); WB (2003b:101) – AFDB (2007a:7); APEC (2011); SADC (2007:42) – DFID (2011b:7); EuropeAId (2010a:32);	9	I.25
	lack of resources	OECD (2004:13); UNESCO (2007b:69f.)WB (2011b:17) – EU (2007b:102); PIF (2009:23) – ADB (2009:34) – EuropeAid (2002:24);	8	I.26
	shortage of teachers	UNESCO (2007b:78); EuropeAid (2006:18); ADB (2009:39);	3	I.27
	corruption	UNESCO (2011b:139); USAID (2005:5)	2	I.28
	distance	ECOSOC (2011:15); EuropeAid (2002:11)	2	I.29
	conflict and disasters	UNESCO (2000:19); USAID (2005:5);	2	I.30
	disease	EuropeAid (2002:24); USAID (2005:5)	2	I.31
	child labor	UNESCO (2010a:168)	1	I.32

	language	UNESCO (2010a:174)	1	I.33
	residency requirements	UNESCO (2010a:176)	1	I.34
	school uniform	UNESCO (2012:75)	1	I.35
	lack of information	WB (2003b:103);	1	I.36
	lack of demand	EuropeAid (2010c:266)	1	I.37
	lack of time	OECD (2004:13)	1	I.38
	lack of portability	EU (2006:8);	1	I.39
	handicap	EU (2011b:46)	1	I.40
dangers	social inequality	OECD (2004c:21); UNESCO (2000:63); PIF (2007:12); WB (2011b:25) - EU (2005:32); AFDB (2007b:5); EAC (2009:77); EuropeAid (2010c:362)	9	I.41
	stress	IMWF (2009:44);		I.42
	educational “distortions“	OECD (2004c:18); LAS (2008:63); SAARC (2007a:44);	3	I.43
	low quality	OECD (1996) – LAS (2008:63)	2	I.44
Code family II: populations				
target groups	by non-specified criteria “marginalized” or “disadvantaged“	ECOSOC (2011:5); ILO (2003a:1); IMF (2006:78); UNICEF (2011:7); OECD (2004c:34); WB (2003b:71); UNESCO (2000:27) – APEC (2010b:51); ASEAN (2009:68); CAN (2004:18); CoE (2008:18); CoL (2012a:19); ECOWAS 2009:1); EU (2012:4); EURASEC (2008: APPENDIX II-2); LAS (2008:158); OAS (2001:27); SAARC (2010b:23) – ADB (2009: 19); AFDB (2007b:16); IADB (2009:1); IDB (2006: 4) – AECID (2006:1); AFD (no date:1); DFID (2011b); EuropeAid (2010:158); GIZ (2012b:7); USAID (2005:5f.) – ICFTU (2004:6); IMWF (2005b:15); UNI (2009:13); BIAC (2001:4); ICC (2012:5); UEAPME (2002a:1); EPSU (2011:7)	35	II.1
	by age	ECOSOC (2011:5); ILO (2003a:1); IMF (2006:78); UNICEF (2011:7); OECD (2004c:14); WB (2000:33); UNESCO (2000:27) – AU (2006:8); CAN (2004:18); EU (2012); LAS (2008:124); OAS (2001:27); SAARC (2010b:23) – AFDB (2007b:16); CoEDB (2006:8); IADB (2009:1) – JICA (2007:19) – ICFTU (2000:192); UNI (2009:13); BIAC (2005:7);	20	II.2
	by socio-economic status	ILO (2003a:1); UNICEF (2011:7); WB (2003b:14); UNESCO (2012:100) – AU (2012:7); CAN (2004:18); CoL (2012b:14); ECOWAS 2009:1); OAS (2001:27) – ADB (2009: 19); AFDB (2007c:19); CoEDB (2006:8); EBRD (2008:81); IADB (2009:1); IDB (2006: 4) – AFD (2006:7); GIZ (2012a:12) – EPSU (2011:20); BIAC (2001:4);	19	II.3
	by sex/ gender	ILO (2003a:1); WB (2003b:14); UNESCO (2010a:43) – APEC (2009:39); CAN (2004:18); CoL (2012a:19); EU (2007b:104); OAS (2001:27) – ADB (2009: 19) – AECID (2006:1); AFD (no date:1); EuropeAid (2002:14); GIZ (2012a:12); JICA (2007:19) – ETUC	18	II.4

		(2006: 21); ICFTU (2002:2); IMWF (2005b:15); BIAC (2005:7);		
	by educational attainment/ status	ILO (2003a:1); IMF (2008:70); WB (2003b:45); UNESCO (2010a:139) – CAN (2004:18); EU (2012:4); OAS (2001:36); PIF (2007:12); SAARC (2010c:37) – AFDB (2007b:16); CoEDB (2006:8) – AFD (2006:7); JICA (2007:19) – EPSU (2011:18); BIAC (2001:4); UEAPME (2008:3);	16	II.5
	by occupation	ILO (2004:3); UNIDO (2008:13); WHO (2006:xxiii) – CARICOM (2011:37); CoL (2012a:19); EU (2007a); OAS (2001:27); OECS (2001:36); PIF (2009:13); SAARC (2007a:43); SICA (no date:36) – AECID (2009: 15);	12	II.6
	by geographic location	ILO (2004:3); WB (2011b:21); UNESCO (2000:27) – APEC (2010b:51); AU (2012:7); EU (2000:18); LAS (2008:158); PIF (2006:12); SAARC (2010b:23) – AFD (no date:1); USAID (2011:1);	11	II.7
	by minority status	ILO (2004:3); IMF (2006:78); WB (2003b:13); UNESCO (2000:27) – ECOWAS 2009:1); EU (2011a:117ff.); OAS (2001:27) – ADB (2009: 19); IDB (2006: 4) – ICFTU (2002:2); IMWF (2005b:15);	11	II.8
	by professional position	IMF (2009: 41) – PIF (2006:2)	2	II.9
Code family III: educational implications				
educational level/ life course phase	further/ continuing/ adult education/ TVET	ILO (2004:3); IMF (2009:41); UNIDO (2007:22); OECD (1996:148); WB (2011b:13); WHO (2006:xxiii); WTO (2007b:7); UNESCO (2001:9); ASEAN (2010:81); BSEC (2007: APPENDIX II-1); CAN (2008:1); CARICOM (2012:2); CoL (2012b:14); EAC (2009:35); ECOWAS (2009:1); EU (2011b:11); LAS (2008:119); OAS (2005a:46); PIF (2009:12); SAARC (2007b:54); SADC (2007:57); SICA (no date:36); ADB (2209:19); AFDB (2007c:19); CoEDb (2006:8); EBRD (2008:61); AECID (2007:1) – EPSU (2011: 18); EI (2012: 12); EMWF (2012:1); ETUC (2006:21); ICFTU (2000:192); IMWF (2006:52); UNI (2009:13); WFTU (2004b:9); BIAC (2003:3); BusinessEurope (2012:5); ERT (2001:11); ICC (2012:5); UEAPME (2003:4-5)	39	III.1
	secondary education (incl. initial TVET)	ECOSOC (2006:9); ILO (2005:7); OECD (1996:126); WB (2011b:13); UNESCO (2001:11); APEC (2008:33); ASEAN (2011:2); AU (2012:2); CARICOM (2012:2); EU (2011c:1); EURASEC (2008:2); LAS (2008:129); OAS (2005a:46); OECS (2007:31); PIF (2012b:2); ADB (2007:16); AFDB (2006:92); CoEDB (2006:8); IADB (2003:1); IDB (2006a:37); AECID (2007:1) – EPSU (2011: 18); EI (2012: 77); EMWF (2012:1); ICFTU (2000:192); BIAC (2001:4); BE (2012:2)	26	III.2
	early childhood care and education (including birth)	ECOSOC (2011:5); IMF (2006:78); OECD (1996:121); UNICEF (2011:7); UNESCO (2007a:65); WB (2000:33); EU (2011a:31); PIF (2009:6); AFDB (2007a:6); IADB (2009:1); EuropeAid (2010:26); BSEC (2007: APPENDIX II-1); LAS (2008:94); AFDB (2007a:6); IADB (2009:1)	15	III.3
	higher education (incl. doctorate level)	IMF (2007c:1); OECD (1996:288); WB (2011b:15); UNESCO (2004:8); APEC (2011:7); CARICOM (2012:2); CoE (2008:18); EU (2011a:31); LAS (2008:155); UFM (2012:1); AFDB (2004: 17); IDB (no date:1); EMWF (2012:1); BIAC (2005b:4);	14	III.4
	primary education (until grade 4-6)	OECD (1996:117); WHO (207a:3); UNESCO (2007b:20); AU (2006:8); CAN (2004:18); LAS (2008:103); IADB (2009:1); IDB (2006a:37); EI (2012: 77); ICFTU (2005b:2)	10	III.5
	“career ending education“	CoEDB (2012b:31); EBRD (2008:61)	2	III.6

	education after retirement	EU (2001:13); WB (2003b:58)	2	III.7
curriculum	subject area: TVET	ECOSOC (2006:9); ILO (2005:7); IMF (2006:78); UNIDO (2008:13); WB (2011b:13); OECD (1996:88); WHO (2006:82); WTO (2007b:7) – APEC (2004:1f.); ASEAN (2009:68); AU (2012:2); BSEC 2007: APPENDIX II-1); CAN 1999: 17); CARICOM (2011:10); CoL (2012b:14); EAC 2009:35); ECOWAS 2009:1); EU (2005:78); LAS (2008:19); OAS (2001:27); OECS (2002:8); PIF (2007:4); SAARC (2007:114); SADC (2007:26); SICA (no date:39); UfM (2012:1) – ADB (2007:16); AFDB (2004: 17); CoEDB (2012a:19); EBRD (2008: 61); IADB (2009:1); IDB (2006a: 37) – AECID (2009: 15); AFD (2006:7); DFID (2011c:4); EuropeAid (2002:14); GIZ (2012a:12) – EI (2012: 12); EMWF (2012:1); ETUC (2006:21); ICFTU (2000:192); IMWF (2005:23); UNI (2009:13); WFTU (2004b:9); BIAC (2005:7); BusinessEurope (2012:5); ERT (2001:11); ICC (2012:5); UEAPME (2003:4-5); EPSU (2011:18)	50	III.8
	basic skills	ILO (2000:2); UNICEF (2012:3); WB (2003:21); OECD (1996:121); UNESCO (2000:31) – CAN (1999:14); EURASEC (2008:APPENDIX II-2); LAS (2008:32); OAS (2005a:67); PIF (2007:3); SAARC (2010c:21) – ADB (no date:2); AFD (2006: 9); DFID 2(004:6) – EuropeAid (2002: 22); JICA (2007:19); SNV (2010: 27); USAID (2003: 61) – BIAC (2001:4);	19	III.9
	"key/ cross-curriculum competencies"	ECOSOC (2011:5); UNICEF (2011:7); WB (2013:88); OECD (1996:121); UNESCO (2001:11) – EU (2007c:8); LAS (2008:78); OECS (2007:17); PIF (2009:5) – IDB (2006a: 37); EuropeAid (2010b:115); GIZ (2011c:1); SNV (2010: 27) – EI (2012:78); BIAC (2003:3);	15	III.10
	subject area: human rights/ democratic citizenship	IMF (2012b:74); UNESCO (2000:65); OECD (1996:103) – AU (2006:8); CAN (2008:1f.); CoE (2007:2); EU (2011a:128); EURASEC (2008:APPENDIX II-2); LAS (2008:9); OAS (2001:30);	10	III.11
	subject area: "life skills"	IMF (2012b:74); OECD (1996:103); UNESCO (2009:43) – AU (2006:8); CoL (2006:2); SAARC (2010c:10) – ADB (2009:73) – JICA (2007:19);	8	III.12
	identity	OECD (1996:100f.); UNESCO (1990:25) – AU (2006:8); ASEAN (2011:3); EU (2005:57f.); LAS (2008:40 & 182);	6	III.13
	subject area: foreign languages	OECD (1996:121); WTO (2007b:7) – ASEAN (2009:68); CoE (2007:2); EU (1995a:1) – IADB (2009:1);	6	III.14
	subject area: environment	UNIDO (2011:41); UNESCO (2009:43) – CoL (2006:2); EU (2010a:2); EURASEC (2008:APPENDIX II-2);	5	III.15
	subject area: social studies/ history	OECD (1996:121) – AU (2006:8); EU (2005:58); LAS (2008:81);	4	III.16
	subject area: humanities	OECD (1996: 103) – APEC (2012:84); EU (2011a:128) – IDB (2006a: 37);	4	III.17
	traditional	UNICEF (2000:30 and 2012:3) – AU (2006:8); OAS (2001:36 and 2007:30);	4	III.18

	knowledge			
	subject area: sciences	OECD (1996:103) – EU (2002:22); LAS (2008:7) – IDB (2006a:37);	3	III.19
	subject area: other	IMF (2012b:74); UNICEF (2003:9); WHO (2007b:13) – SICA (no date:39);	4	III.20
	subject area: religion	LAS (2008:40) – IDB (2006a:45);	2	III.21
learning mode/ setting	non-formal	IMF (2013:46); UNIDO (2011:42); OECD (2007b:12); WB (2003:72); WHO (2006:xxiii); WTO (WTO & ILO 2011:310); UNESCO (2009:43) – APEC (2012:35); ASEAN (2011:3); AU (2006:8); CARICOM (2012:2); CoE (2008:17); CoL (2012a:19); EU (2000:8); LAS (2008:49); OAS (2005a:46); OECS (2002:8); PIF (2007:6); SAARC (2010b:ii); SADC (2007:26); ADB (2009:19); AFDB (2007a:5); IADB (2003:1); IDB (no date:1) – DFID (2004:2); EuropeAid (2002:28); GIZ (2012b:7); JICA (2010b:47); USAID (2011:1) – EPSU (2011: 18); EMWF (2012:1); ETUC (2006:7); ICFTU (2000:192); BIAC (2001:5); UEAPME 2003:4f.);	36	III.22
	formal	ILO (2005:6f.); IMF (2012b:74); UNICEF (2003:9); OECD (2004a:4); WB (2003:58); WHO (2007a:3); WTO (WTO & ILO 2011:303); UNESCO (2000:64) – APEC (2010a:21); ASEAN (2011:3); AU (2006:8); CAN (2004:18); CARICOM (2012:2); CoE (2008:17); EU (2000:8); LAS (2008:49); OAS (2005a:46); OECS (2002:4); PIF (2005:4); SAARC (2007a:43); UfM (2013:1) – ADB (2009:19); AFDB (2006:92); IADB (2003:1); IDB (2006a:40) – AFD (no date a:1); DFID (2004:2); EuropeAid (2010b:177); GIZ (2012b:7); USAID (2005:5) – EI (2012:77); EMWF (2012:1); ICFTU (2000:192); BIAC (2001:4); UEAPME (2003:4f.);	35	III.23
	informal	OECD (2007b:12); WB (2003:72); UNESCO (2000:64) – ASEAN (2011:3); AU (2006:8); CARICOM (2012:2); CoE (2008:17); EU (2000:8); LAS (2008:49); OAS (2005a:46); PIF (2007:4); SAARC (2010a:43) – AFDB (2008:5); IDB (no date:1); AFD (2006:14); EuropeAid (2002:22); GIZ (2012b:7); USAID (2005:7) – EPSU (2011: 18); UEAPME 2003:4f.);	20	III.24
Learn theory and didactics	open and distance learning using ICT	OECD (1996:105); WB (2003:58); UNESCO (2004:8) – APEC (2010b); ASEAN (2008:68); AU (2006:8); CARICOM (2011:10); CoL (2012a:19); EAC (2009:35); EU (2000:18); LAS (2007:19); OAS (2012:27); OECS (2002:17); PIF (2012:3); SAARC (2010b:23); SADC (2007:57); UfM (2012:1) – AFDB (2004:8); IADB (2013b:1); IDB (2006:31) – AECID (b:18) – UNI (2011:3); WFTU (2004b:9); BIAC (2001a:4); ERT 2001:11); UEAPME (2003:4);	26	III.25
	learner-centred learning	ECOSOC (2011:13); UNICEF (2012:8); OECD (2008:3); WB (2003:58); WHO (2006:82); UNESCO (2012:133) – CoE (2007:11); EU (2001:12); LAS (2007:31); PIF (2007:4) – GIZ (2011c:1) – ETUC (2006: 14f.); IMWF (2006:1); BIAC (2001b:46); UEAPME (2003:5);	15	III.26
	inclusive education	ECOSOC (2011:14); ILO (2013:452); IMF (2007b:116)); UNESCO (2011a:5); UNICEF (2011:15); WB (2003b:61) – DFID (2011b);	7	III.27
	coherent, conceptual, contextual learning	OECD (2008:2) – EU (2007c); LAS (2007:32); OECS (2007:17); SAARC (2007a:44); BIAC (2001:4);	6	III.28
	active , collaborative, experiantal	UNICEF (2012:3); OECD (2008:2); UNESCO (2012:133) – EU (2000:17);	4	III.29

	learning and teaching			
	optimizing learning through neuroscience	OECD (2004b:9);	1	III.30
	optimizing learning through pharmacology	OECD (2004b:10);	1	III.31
Code family IV: governance				
Actors believed to be involved in LLL	individual learner	All organizations	59	IV.1
	teachers train, sustain, retain;	ILO (2000a:2); OECD (2008:6); UNESCO (2009:77); UNICEF (2012:3); WHO (2006:48); WB (2003b:28-40) – APEC (2010b:69); CoL (2006:2); EU (2007a:30); PIF (2009:13); OECS (2002:157) – AFDB (2004:15); ADB (2009:71) – EuropeAid (2010c:9); GIZ (2012a:11); USAID (2006:1); EI (2009:12) – BIAC (2001:4); ERT (2001:4); UEAPME (2004:30);	20	IV.2
	state	ECOSCO (2011:24); ILO (2003:1); IMF (2012b:74); OECD (1996:185); UNESCO (2011b:153); WB (2003b:59-72) – CARICOM (2011:34); EU (2001:12); OAS (2005:12) – ADB (2009:15); AFDB (2007:47); EBRD (2008:62); IADB (2003:1) – DFID (2011c:14); USAID (2007:7); EuropeAid (2002:9) – BIAC (2001a:4); UEAPME (2002a:5); ICFTU (2002:3);	19	IV.3
	community	UNESCO (2009:75); IMF (2012b:48); WHO (2007a:35); WB (1999:18) – EU (2005:28); PIF (2007:9); SAARC (2010c:9) – ADB (2009:19); AFDB (2007:47) – JICA (2007:19); GIZ (2012a:3); SNV (2007:22);	12	IV.4
	schools	OECD (1996:113); WB (2003b:28) – EU (2007a:30); CARICOM (2009:15); OECS (2001:8) – USAID (2007:7);	6	IV.5
	NGO : trade unions	ILO (2000:8); UNIDO (2007:32) – UEAPME (2002a:5); ICFTU (2005:2); IMWF (2006:114); UNI (2011:4);	6	IV.6
	donor/ international community (incl. IGOs)	ILO (2000:69); UNESCO (2007b:7); UNICEF (2011: 5); ECOSOC (2011:20); WB (2003b:28-40) – AFDB (2007b:54) – ICFTU (2000:360);	6	IV.7
	employers	ILO (2004:3) – EU (2005:16) – UEAPME (2002a:5); IMWF (2006:17);	4	IV.8
	parents	UNESCO (2009:75); WB (2003b:92) – LAS (2008:99); OAS (2001:30);	4	IV.9
	NGO: business associations	ILO (2000:8); UNIDO (2007:32); UEAPME (2002a:5);	3	IV.10
	NGO:	UNESCO (2007b:57); WB (2003b:58); LAS (2008:50);	3	IV.11

	other or unspecified			
	market-based service provider	WB (2003b:18); APEC (2009);	2	IV.12
	consulting	UEAPME (2003:28);	1	IV.13
funding	pre-primary education: PPP	UNESCO (2007b:184); UNICEF (2011:6); WB (2003b:77); WTO & ILO (2011:310) – LAS (2008:100); SAARC (2010c:10); SADC (2007:41); OECS (2012:41) – ADB (2009:73) – BIAC (2005:3);	11	IV.14
	free public primary education	OECD (1996:239); UNESCO (2000:8); WB (1999:2) – AU (2006:8) – ICFTU (2000:360);	4	IV.15
	post-compulsory education: PPP	ECOSOC (2011:18); ILO (2000:8); IMF (2007b:128); OECD (2004c:10&44); UNESCO (2004:10); WB (2003b:76ff.) – ASEAN (2009:70); AU (2012:5); EU (2002:50); LAS (2008:161); OAS (2005b:3); PIF (2007:17); SAARC (2010b:28) – AFDB (2007b:54); IADB (2013b:1); IDB (no date:1) – DFID (2011c:1); EuropeAid (2010a:41); GIZ (2012a:11) – WFTU (2004b:9); ICFTU (2002:3); BIAC (2011:3); UEAPME (2002a:5);	23	IV.16
	level not specified:			
	international community (incl. debt relief/ swapping)	ECOSOC (2011:19); ILO (2005:6); UNESCO (2011b:151); WB (2003b) – OAS (2005b:3) – AFDB (2007b:54) – EuropeAid (2010b:72) – ICFTU (2000:370);	8	IV.17
	supranational	EU (2000:24);	1	IV.18
ownership	public	ECOSOC (2011:24); ILO (2013:363); UNESCO (2001:49) – ADB (2009:15) – DFID (2011b:6); EuropeAid (2002:16);	6	IV.19
	community	UNESCO (2000:21; 2008:1); UNICEF (2011:31); SNV (2007:13);	3	IV.20
provision	PPP	ILO (2004:3); BIAC (2001b:47); UEAPME (2003:26); IMWF (2006:72); WFTU (2004b:9);	5	IV.21
	employers	ILO (2004:3); BIAC (2001b:47); UEAPME (2003:26); IMWF (2006:72); WFTU (2004b:9);	5	IV.22
	public	ILO (2004:3); BIAC (2011:3); ICFTU (2000:364);	3	IV.23
	NGOs	ICFTU (2000:365); ILO (2004:3);	2	IV.24
	IOs	ICFTU (2000:364); WFTU (2004b:9);	2	IV.25
	private service	WB (2003b:106); APEC (2009:37f.)	2	IV.26

	providers (incl. foreign)			
costs	collective	OECD (2004c:15f.)	1	IV.27
	individual	OECD (2004c:16f.)	1	IV.28
reforms aiming at	decentralization in educational system	IMF (2006:43); UNESCO (2011b:239); UNIDO (2007:28); WB (2011b:69) – EAC (2009:43); EU (2011b:21); LAS (2008:164); SAARC (2007a:50); SADC (2007:27); OAS (2012:37) – ADB (2009:65); AFDB (2008a:4); EBRD (2008:60); IDB (2006a:34) – AFD (no date:1); DFID (2004:3); EuropeAid (2006:9); GIZ (2011c:1); JICA (2007:15); SNV (2007:17); USAID (2007:7);	21	IV.29
	recognition of prior (informal/ non-formal) learning	ILO (2000:6); OECD (2004a:5); UNESCO (2001:31); WB (2003b:65) – APEC (2004:1); ASEAN (2011); CARICOM (2009:15); CoE (2008:17); EU (2009a:8); OAS (2005a:50); PIF (2007:17); SAARC (2010a:8) – AFDB (2007b:8) – AFD (2006); DFID (2011c:14); GIZ (2012a:11) – IMWF (2006:15); UEAPME (2003:5);	18	IV.30
	mobility through harmonization	IMF (2009:41); UNESCO (2012:32); WB (2003b:70) – APEC (2010a:16); CARICOM (2009:9); EU (2011b:22); OECS (2012:43); SAARC (2010a:10); SADC (2007:27) – AFDB (2007b:55) – EMWF (2012:2); IMWF (2009:32); UEAPME (2008:1);	13	IV.31
	education system flexibility	OECD (2008:6); UNESCO (2001:31); WB (2012:xviii) – APEC (2004:6) – CoL (2012b:7); EU (1995a: 24); LAS (2008:83); SAARC (2010b:23) – ADB (2007:17); IADB (2003:1) – DFID (2004:6);	11	IV.32
	work place flexibility	IMF (2013:43); UNESCO (2001:3f.) – ASEAN (2010:84) – IMWF (2005:21); ETUC (2006); UNI (2009:13); BIAC (2003:3); BusinessEurope (2012:5); UEAPME (2003:14);	9	IV.33
	labor market flexibility	EU (1995a:15); BIAC (2005:4);	2	IV.34
	non-formalization of education	UNESCO (2008:4);	1	IV.35
Code family V: epistemics – meanings, contexts, forms				
LLL as	labor policy/ active labor market policy	ECOSOC (2006); ILO (2004); IMF (2013); OECD (2007a); UNESCO (2009); UNIDO (2007); WHO (2006:xxii); WB (2012); WTO (2007a) – APEC (1999); ASEAN (2010:81); CARICOM (2009:2); ECOWAS (2009); EU (2000); LAS (2008:164); PIF S(2007); SAARC (2010a); SADC (2007); OAS (2005a:57); OECS (2012:22) – AFDB (2007b:53); ADB 82007); CoEDB (2012b:31); EBRD (2008:61); IDB (2006:40) – DFID (2011c); EuropeAid (2002:14); USAID (no date) – BIAC (2001:5); BusinessEurope (2012:5); EPSU (2011:16); ERT (2001:11); ETUC (2006:22); UEAPME (2004:58); ICFTU (2002); IMWF (2006:11); ITUC (2012); UNI (2008); WFTU (2004b);	39	V.1
	development cooperation	ECOSOC (2006:9); ILO (2005:6); IMF (2007b); UNESCO (2007b:161), UNICEF (2012:8); UNIDO (2007:48); WB (2011b:28) – APEC (1999); ASEAN (2009); AU (2006); BSEC (2007); CARICOM (2011:10); EAC (2009); ECOWAS (2009); PIF (2005:8); SAARC (2007a); SADC (2007:58); OAS (2005:46); OECS (2012) – ADB (2009); AFDB (2004); EBRD (2008); IADB (2011); IDB (2006a) – AECID (no date); AFD (2007a:5); DFID (2011c); EuropeAid (2002); GIZ (2011c); JICA (2007); SNV (2007); USAID (no date); –	34	V.2

		ICFTU (2002:3); WFTU (2004a);		
	social policy	ILO (2000:3); OECD (1996:91); UNESCO (2009:44); UNIDO (2007:22) – EU (2011a) – BIAC (2005:2);	6	V.2
other initiatives referred to	EFA	UNESCO (2011a:9); WB (2003a:56); WHO (2001:40) – PIF (2007:1); SAARC (2007a:127) – ADB (2009:19) – DFID (2011:20); AFD (no date); EuropeAid (2010b:27);	9	V.3
	MDG	UNESCO (2009:39); UNICEF (2012:iv) – PIF (2012a:2) – AFD (no date); EuropeAid (2010b:27);	5	V.4
	Bologna	IMF (2008:69) – EU (2001:38); CoE (2008);	3	V.5
LLL model elements found in	"World Bank model"	IMF (2008:61); UNESCO (2011a:485); UNICEF (2011:7) – APEC (2004:1); PIF (2007:17); SADC (2007:26); – EBRD (2008:61); DFID (2011c:4); EuropeAid (201c:167);	9	V.6
	"Scandinavian model" (Finland, Sweden, Norway, Denmark)	UEAPME (2003:50); UNESCO (2007b:161); WB (2003b:96); WTO & ILO (2011:223); EU (2005:13) – CoEDB (2006:34); EBRD (2008:61) – EPSU (2008:17);	9	V.7
	"EU model"	IMF (2012a:5); UNESCO (2009:23); WB (2003b:69); WTO & ILO (2011:219) – CARICOM (2011:34); SAARC (2007a:46) – IMWF (2006:18) – DFID (2011c:7);	8	V.8
	"UNESCO model"	OECD (2007b:9) – ASEAN (2011:1); EU (2001:7f.); OAS (2005a:50) – DFID (2011c:14);	5	V.9
	"dual model"	UNESCO (2010a:77); WB (2013:177) – EU (2007b:97) – UEAPME (2003:27); BusinessEurope (2012:3)	5	V.10
	"OECD model"	UNESCO (2007a:45); WB (2003b:74) – APEC (2004:7); EU (2001:7f.);	4	V.11
	Other: Chile	WB (2012), UNESCO (2007a:15); IADB (2011:1).		V.12
	Asian model	APEC (2004:13); ASEAN (2011:3)		V.13
related concepts	knowledge economy	UNESCO (1994:4); OECD (2007a:2); WB (2003a:xxi) – APEC (2004:1); EU (2000:31); OECS (2012:44) – IDB (2006a:40); EuropeAid (2006:10) – BIAC (2001a:4); ERT (2001:4);	10	V.14
	sustainability/ green economy	UNESCO (2009:39) – EuropeAid (2010d:101);	2	V.15
	European social model	EU (2001:6);	1	V.16

LLL as	human capital	IMF (2012b:4); OECD (2004a:7); UNESCO (2009:15); UNIDO (2007:22); WB (2003b:14) – APEC (2009:12); EAC 82009:35); ECOWAS (2009:1); EU (2011b:10), LAS (2008:49); PIF (2007:17); SAARC (2010b:23); SADC (2007:26); OAS (2012:197); OECS (2001:8); UfM (2013:1) – IADB (2009:1); CoEDB (2006:36); EBRD (2008:62) – AFD (2006:19); EuropeAid (2002:33) – BIAC (2001b:8); UEAPME (2002b:14); EPSU (2012:17); ICFTU (2002:2);	25	V.17
LLL as a	concept	ILO (2004:3); OECD (2004:a1); UNESCO (2007a:46); UNICEF (1995:24); WHO (2006:82); WB (2003b:104) – APEC (2004:12); EU (2007b:116), PIF (2010:7); OECS (2007:17) – IDB (no date:1) – DFID (2011c:4) – UEAPME (2003:32); IMWF (2006:108);	14	V.18
	system	ILO (2000:1); IMF (2008:69); OECD (2007a:3); UNESCO (2000:28); WB (2003b:xxiii) – CARICOM (2009:15); EU (2002:8);	7	V.19
	strategy	OECD (2004a:1); UNESCO (2009:33); WHO (2006:82), WB (2003b:61) – EU (2000:4) – UEAPME (2003:8); EPSU (2011:20);	7	V.20
	framework	OECD (2004a:1); WB (2003b:xvii) – EU (2001:25); PIF (2007:17) – ERT (2001:3); UEAPME (2008:2);	6	V.21
	approach	OECD (2004a:5); UNESCO (2007a:46); WB (1999:17) – EU (2002:4); LAS (2008:61);	5	V.22
	vision	UNESCO (2011a:5); WB (2003b:61) – APEC (2004:12); EU (2001:7);	4	V.23
	model	WB (2003b:xvii) – APEC (2004:7) – IDB (2003:1);	3	V.24
	policy/ policies	ERT (2001:8); UEAPME (2002b:15);	2	V.25
	paradigm	UNESCO (2007a:52) – EU (2002:78);	2	V.26
measuring LLL	indicators	UNESCO (2009:41); OECD (1996:Ch.6); WB (2003b:104-107) – EU (2002) – ADB (2007:16) – DFID (2011a:1) – ERT (2001:11);	6	V.27
inconsistencies	educational expansion trade-off: general vs. TVET	EU (2011c:2); UNESCO (2012:242); WB (2013:177); EuropeAid (2010c:362); AFDB (2007b:5f.); EU (2011a:111); LAS (2008:137); SAARC (2007a:23); OECD (1996:103)	9	V.28
	Lack of evidence of positive impact	OECD (1996:32; 2007b:11); WB (2003b:6; 2011b:12); IMF (2007b:73); UNIDO (2007:28); UNESCO (2011b:132) – EU (2001:48) – AFDB (2007b:5) – USAID (2007:5)	8	V.29
	"Taylored menus"	UNICEF (2012:51); UNIDO (2011:29); WHO (2007b:2); WB (1999:31) – DFID (201c:13); USAID 2003; GIZ 2012a; EuropeAid 2000a	8	V.30
	Direct evidence of decoupling	OECD (1996); WB (2003b:104ff.) – LAS (2008:63) – AFDB (2007b:13) – DFID (2004:1f.); USAID (2007:9-11)	6	V.31

	Standardized measurement good or bad?	OECD (1996:109) vs. all later documents, particularly OECD (2007a); WB – EU (2002) – ADB (2007:16ff.) - DFID (2011a:1)	5	V.32
	LLL to "prepare" for unemployment	UNESCO (2001:35);	1	V.33
	Who's failure?	OECD (1996:92 vs. 2008:1)	1	V.34
narrative style	identity	OECD (1996:)); UNESCO (2011a:23) – AU (2006:8); ASEAN (2011:2); APEC (2004:12f.); CAN (2003:11); CARICOM (2009:13); EU (2005:58); LAS (2008:40); OECS (2001:14) – IMWF (2009b:44)	10	V.35
	history	UNESCO (1996:12; 2007a:46); ILO (2003:1); WB (2003b:71) – APEC (2004:1); BSEC 2007:1); EU (1993:69; 2000:6); LAS (2008:61); PIF (2010:7) – IADB (2011:1) – IMWF (2006:1)	11	V.36

Appendix C.4: Memo example (type-construction March/ April 2013)

Explanatory note:
On the basis of the material analyzed at an early stage (winter 2012/2013) I tried to structure the material in types using the models from the literature both on LLL and social policy. The efforts have not proven fruitful confronted with the complexity in the material. Organizations cannot be ascribed a type that would be internally consistent enough.

Orienting memo #1

Type construction is mainly done in four steps (Kluge 1999).

1) deductive and inductive categories for comparison of possible types
2) pooling cases along these categories and highlighting regularities within these pools and differences between pools
3) internal structure and elaboration of types
4) carving out the typical, labeling

Based on first steps of analysis, attempts to construct types might include the following structure:

A) Causal LLL types

Why? Causes of LLL	**What for? Benefits of LLL**		
	employability	*Inclusion of marginalized groups*	*sustainability*
Economic change	OECD; WB; IMF	UNESCO;	WHO; UNIDO
Social change	??	UNESCO	ICC

Type labels:
- LLL as inevitable
- LLL challenge
- LLL as evolution
- LLL as individualization

B) Final LLL types (Schuetze & Casey 2006 models useful??)

What for? General/ indirect goals	**What for? Concrete/ direct goals**			
	employability	*Educational expansion*	*Quality education*	*democracy*
Sustainability				
Personal development				
Social development				
Social justice				

Type labels:
- LLL as empowerment/ emancipation through holistic LLL
- LLL as empowerment through TVET

Comment: is there any non-instrumental model/ type? (Wiesner & Wolter)

C) Curriculum types

What? Content	**What for? Goals**			
	employability	*inclusion*	*development*	*democracy*
Ethical competences				
Social c.				
Communication c.				
Vocational c.				
Political c.				

Type labels:
- LLL as vocational education for employability
- LLL as ethical education for personality
- LLL as active democratic citizenship education for political empowerment

Comment: What to do in cases where multiple goals co-exist?

E) Actor types/ governance (pluriscalar governance; Dale 2005 useful??).

Not enough references

Who? Recipient vs Who? Sender

Type labels:
- community-based LLL
- business-driven LLL
- local government ???
- Public-Private mix

Comment:
Does it make sense to bring sender and recipient into the same matrix? Are recipients always so clear? Funds are usually handed to governments or NGOs. Are NGOs the same as the community?
Can types contain three or more layers? (from IO to national government to regional and local government to locally-operating INGO and local NGO and community...!!)

F) life-cycle types

curriculum	**Life phase**				
	ECCE	*primary*	*secondary*	*HE*	*AE*
Social c.					
Ethical c.					
TVET					

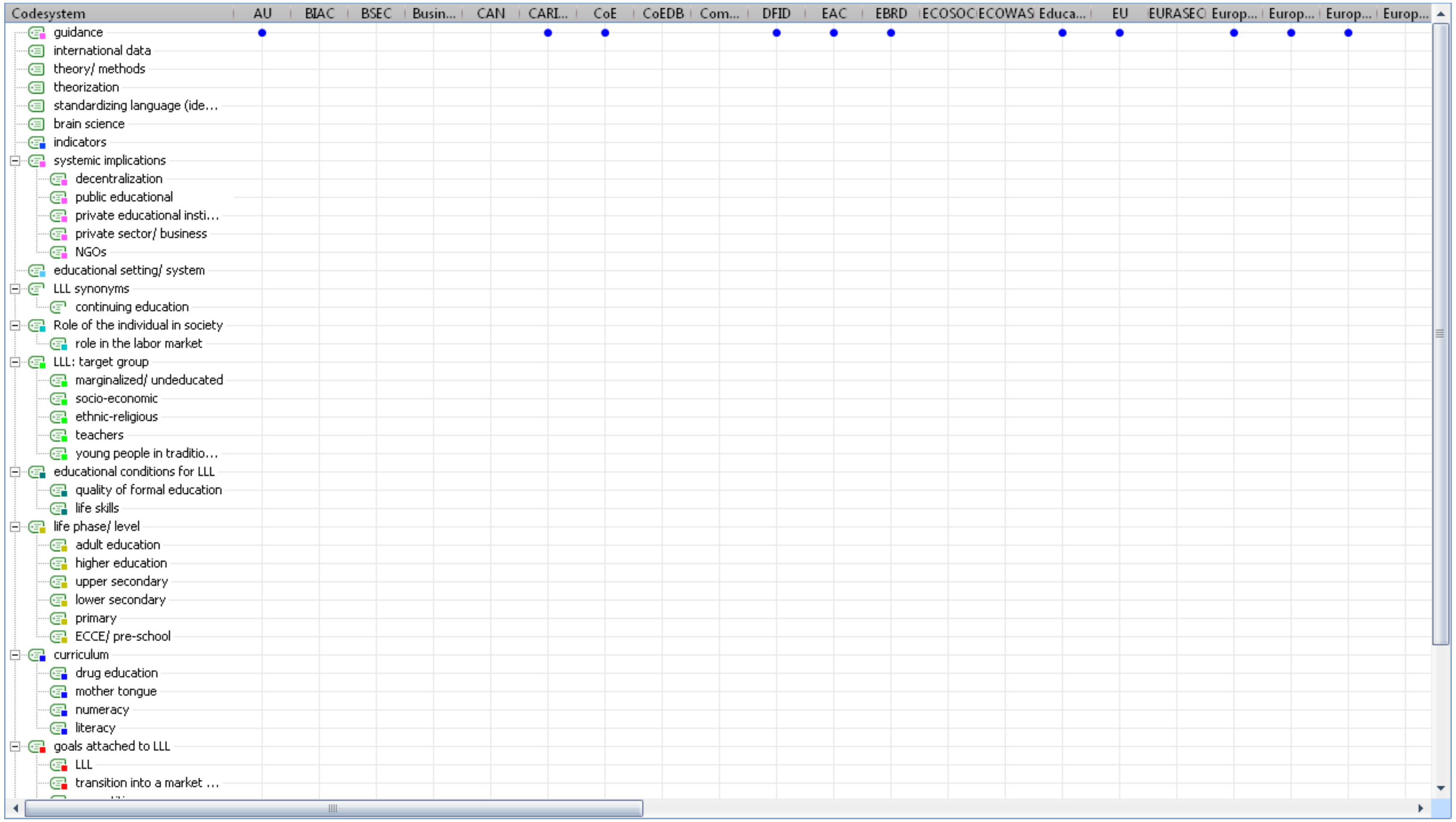
Type labels:
- ECCE as LLL foundation
- LLL as a renewal and extension of EFA goals (primary education)
- LLL as TVET
- LLL as the non-traditional campus (Schuetze 2005)
- LLL as adult education

Comment:
It makes sense to distinguish content and phases, but often phases overlap and vary according to the system. HE and TVET are particularly difficult to separate...

G) Institutional architecture

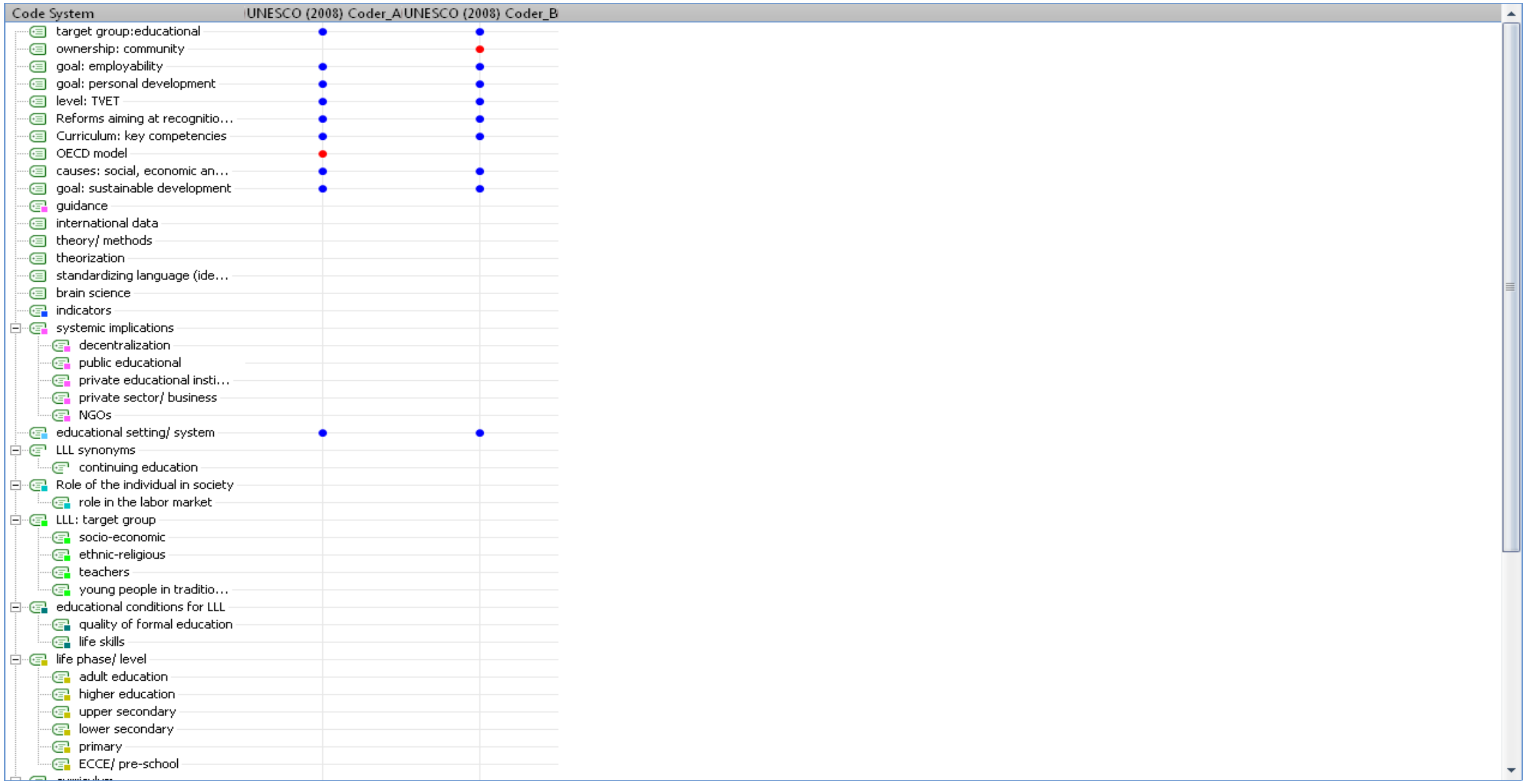
H) Types of funding

Appendix C.5: Screenshot of coding procedure in Maxqda (January 2014)



Appendix C.6: Screenshot of intercoder correlation in Maxqda (December 2013)

Intercoder agreement based on limited set of codes and documents: 95%



Appendix D: Questionnaire (format changed/ short version)

Questionnaire

World Educational Expansion and International Organizations

Mike Zapp
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This questionnaire is part of my dissertation project that investigates the role of international organizations in education worldwide. I would very much appreciate your cooperation. For further inquiries, do not hesitate to contact me.

All data is for scientific purpose and treated with utmost confidentiality!

A) Structure and Organization

1) Is there a department/ organizational unit that specifically deals with education as an issue area?
Yes □
No □
2) If yes, when has this unit been founded?
____
3) If no, what department/ organizational unit in your organization deals most with education?
____

B) Staff

4) How many people currently work at your organization?
____
5) How has this number evolved over time?
By ________% since ________
6) Is there any data base that describes the quantitative development in staff numbers in general since the founding of your organization until today?
Yes □
No □
7) Is there any longitudinal data on staff employed by your organization working in **education** or in the department/ unit dealing most with education since foundation until today?
Yes □
No □

Note: If the following questions cannot be answered with regard to staff dealing specifically with education within your organization, they apply for staff in your organization in general.

8) What is the average level of educational attainment of staff working in this educational unit?
____
9) What are the three most frequent academic backgrounds (type of studies; e.g. economics)?
____
____
____
10) What are the three most frequent universities these people come from?
____
____
____

C) Budget

11) How has the budget allocated to education (as operational policy) evolved over time?
From _________ million US-Dollar in _______ to _________ million US-Dollar today.
13) How is this budget internally structured, that is, what percentages are allocated to which educational sector/ level projects and funds (from early childhood to higher education and adult education)?
________million US Dollar allocated to early childhood care and education
________million US Dollar allocated to primary education
________million US Dollar allocated to secondary education
________million US Dollar allocated to higher education
________million US Dollar allocated to non-vocational adult education
________million US Dollar allocated to vocational adult education
________million US Dollar allocated to other/ non-specified education levels

D) Work on education

14) When did your organization start working on education, that is, publish its first document with an explicit focus (section or chapter) on education?
In ________
15) How much of the organizations' budget is allocated to educational research?
_______million US Dollar
16) How much of the organizations' budget is allocated to publications with a specific focus on education?
_______million US Dollar
17) How many projects with a specific focus on education are currently being funded by the organization?
_______projects

Thank you very much!