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Convergence Volume XL (3–4) 2007

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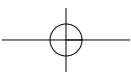
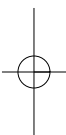
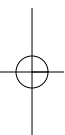
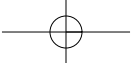
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 Designed and typeset by Creative by Design Ltd. Printed in the UK by Hobbs the Printers.



EDITORIAL

Ana Agostino, Heribert Hinzen, Joachim H. Knoll



Ana Agostino



Heribert Hinzen



Joachim H. Knoll

Abstract

This issue of Convergence represents an editorial development in itself. It was originally planned as a collection of articles on a diversity of thematic areas around the UNESCO International Adult Education conference in Brazil 2009. Later in the process it got closer to the discussions within the ICAE to prepare for CONFINTEA VI. It was thus decided to include the most recent policy document as well as key papers from the virtual seminar that took place to generate a debate around key themes likely to be of prime importance.

Resumen

Este número de la Convergencia equivale por sí mismo a la elaboración de un editorial. Originalmente se planificó como una colección de artículos sobre una diversidad de áreas temáticas que giran en torno a la Conferencia Internacional de la UNESCO sobre Educación de Adultos a celebrarse en Brasil en 2009. Más tarde, en el proceso, se dio una mayor aproximación a las discusiones que tenían lugar dentro del ICAE para preparar la CONFINTEA VI. De esta manera se decidió incluir el documento más reciente sobre políticas, y también documentos clave que emanaron del seminario virtual que tuvo lugar para generar un debate acerca de temas cruciales que parecían ser de máxima importancia.

Résumé

Ce numéro de Convergence constitue en soi une évolution éditoriale. Il avait été prévu à l'origine comme recueil d'articles sur tout un ensemble de thèmes divers touchant à la Conférence internationale de l'UNESCO sur l'éducation des adultes qui se tiendra en 2009 au Brésil. S'étant par la suite tourné vers les débats au sein du CIEA concernant les préparatifs de la CONFINTEA VI, il fut décidé d'y inclure le tout dernier document politique ainsi que des documents majeurs, fruits du séminaire virtuel organisé dans le but de créer le débat autour de sujets essentiels dont il est probable qu'on leur accordera la plus haute importance.

The UNESCO International Conferences on Adult Education are milestones on the difficult road to the development of a distinct policy. Adult education is a profession that is still undergoing a process of terminological and conceptual clarification, and it has suffered continual crises of legitimacy. It is helpful that the community of nations and the government representatives responsible for this sector of education can meet with specialists and non-governmental organisations under the aegis of UNESCO to exchange information, to examine the state of affairs, and to fathom out what steps can be agreed and planned for a shared future. Let us leave aside the question whether there should be a 12-year gap between such meetings. Whatever we may think, the Sixth International Conference is now imminent.

CONFINTEA VI will be held in Brazil in 2009. By way of preparation, several regional conferences will be used to investigate matters specific to individual countries. The first, for Latin America and the Caribbean, will take place in Mexico in September 2008, to be followed by the conferences for Asia and the Pacific in Korea in October, for Africa in Kenya in November, for Europe and North America in Hungary in December, and for the Arab States in Tunisia in January 2009. The UNESCO Institute for Lifelong Learning (UIL) is heading up this process, supported by the CONFINTEA VI Consultative Group, made up of representatives of governments, specialist institutes and non-governmental organisations. They will be responsible for ensuring that the country and regional reports, and the results of the regional conferences, are brought together in a *Global Report on Adult Learning and Education* to be presented in Brazil.

Lifelong learning is a paradigm that has long dominated national and international discussion of education policy, not only in relation to adult education. The European Union (EU) has made rapid strides. In 2000 it drew up a Memorandum on Lifelong Learning that was widely circulated and discussed in Member States. This envisaged an education system in which

school, vocational training, tertiary education and continuing education would be given equal weight, in which there would be many ways of transferring between the individual institutional sectors, and in which non-formal and informal learning would be recognised as being of great importance alongside formal learning and as needing to extend “from the cradle to the grave”. Just a few years later, a communication on learning in adulthood appeared, under the title *It is never too late to learn*. This focused specifically on education for citizenship and enhanced employability, and called for greater accessibility, particularly for young people and adults from a migrant background. An action plan was also agreed in 2007: *Adult learning: It is always a good time to learn*. This set out clear positions on quality, development of indicators and benchmarks, validation of learning outcomes, and the need to commit the investment needed.

In 1995, only a short time before these developments within the EU, the Delors Report was published under the title *Learning: The treasure within*. This UNESCO study looked forward to the challenges facing an effective education system in the 21st century. The thread running through it was also lifelong learning, here termed, “learning throughout life”. The year 1996 had already been declared the Year of Lifelong Learning by the EU, with the aim of stimulating a wide spread of activities that would give a lasting impetus to motivation. The UNESCO International Conference on Adult Education held in Hamburg in 1997 then addressed the dimension of lifelong learning through a number of major themes: education in the world of work, environmental and health education, the new technologies (which were then new), basic education and literacy, and the nature and content of international cooperation.

The historical context of CONFINTEA VI is set out in the paper by Joachim H. Knoll, who not only reflects on the past decade but also traces the International Conferences back to the foundation of UNESCO as a post-war instrument to bind peoples together in the interest of lasting peace. CONFINTEA has played an important part among the panoply of international education initiatives, a good many of which have been given the status of Decades by the UN. However, that role has often been subordinate. It is therefore helpful to look also at the education programmes and development decades that have run in parallel, and to assess the relative priority given in them to adult education: that is the purpose of the paper by Heribert Hinzen.

Brazil will be the host country in 2009. It is therefore appropriate to explore the situation of adult education in that country. Who could have been in a better position to do this than Timothy Ireland, who is responsible within the Brazilian National UNESCO Commission for preparing and conducting CONFINTEA VI?

Country and regional reports are presented on England, Hungary, Germany, South East Europe and Asia. These are concerned on the one hand with developments since CONFINTEA V, and on the other with the mobilising the potential of civil society organisations in light of the impending conference. There can be no doubt that this is a conference held by and for governments and UNESCO. Specialist and non-governmental organisations are nonetheless invited to contribute their experience and their views, with particular regard to the practical consequences of the way in which decisions and recommendations are implemented in the future. Questions may be asked, for example, about how far the right to education, which can be derived from the UN Charter, has so far been extended to people of adult age. This issue has after all been discussed prominently at previous International Conferences. Doubts may also be raised as a result of the CONFINTEA VI preparatory process about whether the outcomes of Hamburg have actually had an impact on the development of adult education and if so, what evidence there is to that effect.

Lastly, a number of selected topics are examined more closely: the right to literacy, the demands of a policy of gender equality, with particular regard to minorities, and the structural prospects of world development resulting from globalisation. Major organisations that play a significant role in globalisation are having a considerable impact on many aspects of life, including education. One example is the Organisation for Economic Cooperation and Development (OECD), which argued as long ago as the 1970s for “recurrent education” – the periodic alternation of education and work – and has made an important contribution to the debate on continuing education and training since the mid-1990s through a wide variety of studies. The main development cooperation donor organisations, chief among them the World Bank, have had almost as great an impact on worldwide trends, albeit from a different perspective. World Bank analyses and targeted support programmes have had a major influence on the development of education systems, especially in the southern portion of the globe.

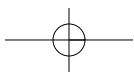
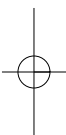
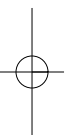
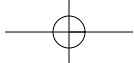
The International Council for Adult Education (ICAE) and its member institutions take the CONFINTEA process very seriously. Following consultations at the ICAE 2007 World Assembly in Kenya, four thematic areas were chosen as being particularly important: literacy for all, education and migration, adult education in the world of work, and poverty reduction, together with the structural implications of the nexus of education policy, legislation and funding. A wide-ranging process of information-gathering and deliberation took place. Introductory papers focusing on these themes were written and placed on the Internet, producing lively discussion through a virtual seminar that lasted several weeks, the course and results of which are reported on the website www.icae.org.uy. The themes were further explored during Adults Learners’ Week by NIACE, which invited colleagues to a face-to-face-seminar in England to discuss the results in greater depth, on the basis of a policy paper.

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For this special issue of *Convergence* we have selected a total of 12 articles, three on each of the four themes of the virtual seminar. The aim has been to achieve a balance between theory and practice, the regional perspective, gender and generations. These articles are intended to help participants in the conferences to make a more substantial contribution to the debate.

The timing of the publication has been chosen so that it appears before the first regional conferences and can therefore make an input to the conference process. We have been successful in securing funding to subsidise this special issue, so that a copy can be made available to every participant in the regional conferences and the world conference in Brazil; we extend our warmest thanks for this to NIACE and *dvv international*.

The Guest Editors are also grateful to the Böhlau Verlag and its journal *Bildung und Erziehung*, in which some of the papers have already appeared in German. Editions in other languages are also being prepared in order to widen the readership. Romanian and Russian versions of individual papers are already available. Since Brazil is the host country, work is rightly being done to prepare a Portuguese edition. Lastly, we are truly indebted to all those, such as Bob Hill, Virman Man and Gisela Waschek, who have played a part in the complex process of producing this issue, either as publishers, editors, translators or organisers.



CONFINTEA VI KEY ISSUES AT STAKE INTERNATIONAL COUNCIL FOR ADULT EDUCATION PUBLIC PAPER

Abstract

It may be good to remind ourselves that ICAE was created in 1973 as an international non-governmental organisation in the context of CONFINTEA III which was held in Tokyo in 1972. Ever since it has grown as a global network. The ICAE Executive took the initiative to start a process to prepare for CONFINTEA VI in Brazil via a virtual seminar to discuss key issues to be looked by governments and civil society. This public paper is an outcome of this process, and it is intended to be taken to the regional pre-conferences as well as to the global.

CONFINTEA VI. LOS PUNTOS CLAVE EN CUESTIÓN. DOCUMENTO OFICIAL DEL CONSEJO INTERNACIONAL DE EDUCACIÓN DE ADULTOS

Resumen

Puede ser saludable recordar que el ICAE fue creado en 1973 como una organización internacional no-gubernamental en el contexto de la CONFINTEA III, celebrada en Tokio en 1972, y que desde entonces ha ido creciendo como una red global. El Comité Ejecutivo del ICAE adoptó la iniciativa de poner en marcha un proceso de preparación

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de la CONFINTEA VI, en Brasil, por medio de un seminario virtual para la discusión de puntos clave a ser tenidos en cuenta por los gobiernos y la sociedad civil. Este documento público es un resultado de dicho proceso, y se pretende que sea asumido tanto por las pre-conferencias regionales como por la global.

ARTICLE DU COMITÉ EXÉCUTIF DU CIEA

Résumé

Il pourrait être judicieux que nous nous rappelions que le CIEA fut créé en 1973 en tant qu'organisation internationale non gouvernementale à la suite de la CONFINTEA III qui s'était déroulée à Tokyo en 1972. Il a depuis pris de l'ampleur et est devenu un réseau mondial. Le comité exécutif du CIEA a pris l'initiative d'entamer des activités préparatoires pour la CONFINTEA VI, qui doit se tenir au Brésil, en organisant un séminaire virtuel pour aborder des sujets essentiels sur lesquels les gouvernements et la société civile devront se pencher. Ce document public est le fruit de ces activités. Il est prévu qu'il soit présenté aux conférences liminaires régionales, mais aussi à la conférence internationale.

Following a large consultation among its members and networks, the International Council for Adult Education (ICAE) proposes four themes as key areas of debate and decision on adult learning and education (ALE) during the coming CONFINTEA VI Conference in Belem, Brazil in May 2009 and the preparatory meetings to be held in each world region. These are offered in a spirit of dialogue with governments, international agencies and non-governmental organisations (NGOs).

The four themes are:

1. Poverty and growing economic social and cultural inequality an important background for work-oriented adult learning and education.
2. The right of migrant women and men to education and learning. Fundamental tenets of this theme are that there are no illegal migrant people, only people without papers, and that above all, refugees have a right to survive and reconstruct their lives.
3. The priority of adult education, including literacy, as both part of the Education For All (EFA) goals and a critical tool for reaching them. Equally, adult education is a central but invisible component of the Millennium Development Goals and is indispensable to all strategies for achieving them.

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4. The need for new policy and legislation to ensure the right to learn without discrimination based on age, gender, race, ethnicity, class, sexual orientation, religion and disabilities and national status, and for their real implementation where a critical test of truth will be the concrete financial allocation. Policies and legislation (including measures to address discrimination in all these areas) are pre-requisites for achieving this but implementation of the right to education will be dependent on securing sufficient resources, including funding. This will be the ultimate test of governmental commitment.

To these ends, legitimate international monitoring mechanisms are absolutely necessary.

Poverty, economic inequality and adult learning and education

Poverty and social exclusion cannot be dissociated from the structural inequalities reflected in and reinforced by the uneven distribution of work-related learning education activities, either of vocational education and training or of provision for life skills development. Unequal participation in organised adult and non-formal education, especially by economically marginalised people, must be a priority for the deliberations of CONFINTEA VI. The Conference should recognise the interdependence of learning for work, learning for individual and collective empowerment, and learning for social justice.

At stake are the learning and education rights of people excluded from significant initial education, of older people, of members of minority groups and indigenous peoples, of asylum seekers or refugees and adults with learning difficulties and disabilities, amongst others. Women and men who work in the formal economy require decent, sustainable work and opportunities to continue to learn and improve their skills as well as the possibility to improve their qualifications and protect or enhance their chances to earn a living and gain satisfaction from their work.

The demand of people in the informal agricultural or craft economy for non-formal education and training is not less urgent. Women and men working in the informal economy have an equal right to access to skills and knowledge in order to improve their chances of securing a livelihood and of progressing economically, socially and educationally.

The majority of workers with low or no remuneration for their labour are women. They are active in the informal economy in great numbers and, at present, are becoming heads of households. Women are a priority population for the development of policies around decent work, social security, education and development. Strategies for achieving this must take account of the impact

of unpaid, 'invisible' and domestic work (the care economy) on the capacity of women to engage with learning activities which are designed to reduce both economic inequalities and restrictions in employment opportunities.

A successful strategy to solve the current food crisis has to include strong agricultural extension and literacy provision in rural areas on all continents.

CONFINTEA VI will need to address, in both the formal and informal economy, gender bias in access to basic education and adult learning in general organised education and training, as demonstrated in the *Global Monitoring Reports* (GMR) of UNESCO on EFA. Similarly, in the workplace, discrimination in work-related learning opportunities is taking place. Analyses should also take account of the impact of the under-representation of women in status categories and networks where learning provision is provided more frequently.

A key strategy for equitable development in work-related adult learning in order to reduce economic inequality is a learner-led approach, recognising the diversity of populations, a valuing of their lifestyles and their multi-dimensional learning aspirations.

The Conference must consider the influence of gendered curricula on the aspirations and work patterns of both men and women, and be mindful of the potential to reinforce rather than challenge gender stereotypes.

Finally, adult learning responses to poverty, including economic inequalities, must be supported by, and linked to, interdisciplinary, cross-governmental action in other areas such as childcare, health, justice, civil society, housing, and the environment. For example, the right to education and lifelong learning (particularly literacy), in order to work cannot be separated from economic policies, agrarian and land reforms, sustainable production and sustainable consumption as key elements in adult education programmes linked to quality of environment and quality of life.

Presently, the global food crisis is the absolute priority to be faced since it threatens the most basic need which concerns the biological survival of millions of people, particularly in poor countries. Adult education must provide appropriate information and education to face this vital problem which especially affects women and children.

The education and learning rights of migrant women and men

Migration is a global phenomenon, whether north-south, east-west, south-south or within countries. There are no illegal migrant people, but people without papers. Similarly, the educational rights millions of refugees are

essential if they are to survive and reconstruct their lives. We are all world citizens covered by the *Universal Declaration of Human Rights* stating that not only registered citizens but all human beings have the right to education.

The social demand for adult learning is reciprocal. First, there is the right of migrants to language education, to vocational education and training, to citizenship education, and to benefit from the general provision of learning opportunities, to employer-supported training, and to recognition and validation of past experience, learning and qualifications. Education also entails learning for receiving communities, for local leaders, service providers, trades unions, and the general public. Programmes should cultivate the skills, understanding and knowledge needed to address issues arising from migration and migrants, and include education in human rights – all cultures are worthy of respect but some cultural practices are oppressive.

Migration offers unique opportunities for multicultural and intercultural education. That requires safe, local spaces for mutual learning. However, migration is hazardous and education strategies also need to contend with such global issues as the rise of trafficking in women.

The financial support of diasporas to their communities of origin should be recognised in Official Development Assistance (ODA). Moreover, the issue of financial compensation for nations drained of skills and expertise should be addressed.

The absolute priority of adult literacy

The well-documented deficiency in the implementation of the EFA objective on adult literacy is a global disgrace. And this in spite of well-substantiated evidence on the contribution of adult literacy to quality of life, to school achievement of children through parental education, to increase of agricultural productivity and food production, to the conflict-resolving capacity of communities, to basic skill improvement in the workplace as required by industrial development, to efficient delivery of universal healthcare, and so on.

A substantial policy shift is required and should become a key expectation at the CONFINTEA VI Conference. Adult literacy is a multi-dimensional reality and thus requires a diversity of approaches and measures as well as the development of significant literate environments. It is a continuum and its development is an ongoing process rather than a cognitive set of skills, which result in a state of permanent literacy. Policy must move beyond providing for the acquisition of skills, to supporting their sustainability. The problem of relapse into illiteracy is acute. Key to addressing this is linking adult literacy to the lived experiences of learners' lives, such as micro-credit-based programmes for women.

The expertise exists. The social demand is well expressed. What is needed is ACTION from national governments (allocating the equivalent of 3 per cent of national education budget) and cooperation with multilateral agencies and other partners (recognising adult literacy as a complementary priority to universal primary education). The Literacy Initiative For Empowerment (LIFE) is clearly under-financed. The Fast Track Initiative (FTI) has to rediscover the essential contribution of adult literacy to become successful.

The current International Monetary Fund (IMF) policy requiring national governments to freeze investment in education must be challenged and revised.

CONFINTEA will take place at the end of key policy reviews that will create a momentum: the mid-term review of the Fast Track Initiative, the UN Literacy Decade review; the EFA mid-term review, the 2009 GMR report (*Overcoming inequality: why governance matters*) to be issued in November, the Global Campaign for Education (GCE) the Conference on finance for development and the Millennium Development Goals mid-term assessment process. Positive examples illustrative of the concern being demonstrated by some governments and some cooperation agencies should be highlighted in regional preparatory meetings.

International quantitative and qualitative benchmarks are required to monitor governments' committed leadership and resources, to look at the situation of literacy participants and of literacy facilitators, their conditions of work and their training, to assess the provision of learning materials and the enrichment of literate environments, to monitor sustained and appropriate public, national and international investment. Agreed indicators are needed in each of these dimensions of adult literacy policy.

New policy and legislation, real implementation, real financial allocation

Adult learning policies cut across all sectors of activities, because increased capacity of action of the whole adult population has become a prerequisite in all areas of activities: in agriculture, in industrial development, in health, in environment, in criminal justice, and so on. The issue is twofold: accessibility of adults to learning opportunity and the quality and relevance of such learning provision.

A central issue for CONFINTEA VI and the preparatory meetings is the absence of adult learning and adult literacy within the MDGs, despite the fact that none of the existing Millennium Development Goals can be achieved without them. Although formally it is nowhere, adult learning is required everywhere to ensure the active participation of local civil society in the implementation of all and each of these targets.

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It is also fundamental to mainstreaming the Millennium Development Goals with a gender equity approach. Various steps must be taken to address the current neglect of adult learning. Those countries that do not have an adult learning policy should formulate one: an overall policy on education is not sufficient to counter the tendency to marginalise the interests of adults. Delivery arrangements and responsible bodies and departments must be identified and communicated clearly, particularly when adult learning is a cross-cutting concern; adult education programmes must be responsive to gender discrimination and other causes of poverty and social exclusion; and capacity-building educators and facilitators are needed in order to improve the understanding of pedagogy and the dimensions of marginalisation.

However, without governmental intervention, without policy orientation, without public institutional support, without state regulation, without national monitoring, and without public investment, the prevalent trend of reproduction of inequality will prevail. Without such policies, the contribution expected of adult learning and adult literacy in particular cannot be achieved.

Our goals regarding the financing of education are clear: we need to increase the share of education in national budget in respect to other budgets, to increase the part of educational budget allocated to *adult education and learning* (ALE) and to adult literacy and to be able to monitor national budgets in order to ensure efficient investment where it matters most: in the collective intelligence and creativity of our society, and the initiative and ingenuity of people.

Successful policy advocacy in adult learning requires the participation of a large spectrum of civil society organisations: adult learners' movements, trade unions, women's groups, national and regional movements of adult education. The adult learners themselves and their success stories are the strongest advocates.

Advocacy and dialogue with donors should be undertaken for the recognition of adult literacy as a complementary priority to universal primary education (UPE). Successful policy advocacy in adult learning requires the participation of a large spectrum of civil society organisations: adult learners' movements, trade unions, women's groups, and national and regional movements of adult education

The necessity of legitimate international monitoring mechanisms

Action requires international monitoring mechanisms, without which there can be no effective evidence-based advocacy work. Within the EFA framework and the MDGs it should be possible to add relevant adult learning indicators to each of the goals. It should be possible for similar additions of adult literacy and

ALE indicators in the FTI, using the *Global Campaign on Education* (GCE) benchmarks. These can be part of an autonomous post-CONFINTEA follow-up initiative.

New quantitative and qualitative benchmarks are needed to provide evidence of gender mainstreaming and all its intersections around race, disability and so on. Furthermore, there can be no effective solution to poverty, exclusion, the food crisis, migration and displacements resulting from climate change unless educational policies take account of the changing and unstable global context. In the area of access, monitoring mechanisms need to track against the multiple causes of marginalisation, and provide retention and achievement data, particularly in relation to literacy. In elementary education, retention data has proved crucial to realigning and designing policies and programmes.

Conclusion: Time for action

Concrete action is urgently needed to recognise the dignity of each woman and man. The right of each person to learn, above all, her right to literacy, is her right to improve her life conditions, to dream about her future and to be able, with others, to construct and reconstruct their lives and their environment. The exercise of this fundamental enabling right is more urgent than ever in rural village and urban districts, in the economy and in the workplace, among national citizens as well as migrants and those without papers, and in every region of the world.

There will be no solution to the food crisis without the increased capacity of women and men to act on the land on each continent, making a better quality of life and quality of environment, revising patterns towards sustainable production and sustainable consumption.

We will never achieve the goal of Health For All without significant increase and universal dissemination of health literacy.

The planet's future is dependent on the capacity of citizens to share environmental concerns and responsibility. The unique enjoyment of a meal with family members and friends without fear of war or violence, will not be reached without grassroots diplomacy and mediation competence at all levels of social and political life.

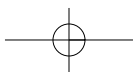
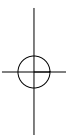
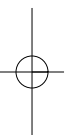
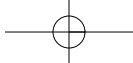
Concrete action is required NOW to ensure the fundamental right of women and men to learn and to develop themselves throughout their life. At stake is the dignity of each citizen as well as his and her aspiration to share in the exploration and development of *another possible world*.

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We know what kind of policies and actions are needed. So many success stories have been and could be told. We have discussed them at CONFINTEA V and explored them since. What is required now is **action** and, for this, **political and community will**.

Time is pressing. The risk of not acting is too high.

The message, received from all regions of the world, is clear: CONFINTEA VI is about achieving real, visible and enduring change.



Joachim H. Knoll

**THE HISTORY OF THE UNESCO
INTERNATIONAL CONFERENCES ON
ADULT EDUCATION – FROM
HELSINGÖR (1949) TO HAMBURG
(1997): INTERNATIONAL EDUCATION
POLICY THROUGH PEOPLE AND
PROGRAMMES**

Abstract

This paper starts with the founding of UNESCO and the fundamental belief that humanitarian, social and political deficits in given societies can be corrected by means of education. The history of the UNESCO International Conferences on Adult Education (Elsinore, Montreal, Tokyo, Paris and Hamburg, 1949–1997) demonstrates the changes in perceptions of adult education, from literacy to lifelong learning, in which adult education is seen as both part of the continuum of education and an entity in itself. In course of time, the position of participants (governments, NGOs and experts) has changed likewise. Since the author was a member of the German delegation at several of these conferences he feels competent to analyse the proceedings and to describe the atmosphere as well.

LA HISTORIA DE LAS CONFERENCIAS INTERNACIONALES DE LA UNESCO SOBRE LA EDUCACIÓN DE PERSONAS ADULTAS – DESDE HELSINGÖR (1949) A HAMBURGO (1997): LA POLÍTICA INTERNACIONAL DE EDUCACIÓN DE PERSONAS ADULTAS A TRAVÉS DE LAS PERSONAS Y LOS PROGRAMAS

Resumen

Este trabajo comienza con la fundación de la UNESCO y la creencia fundamental de que el déficit humanitario, social y político en ciertas sociedades puede corregirse por medio de la educación. La historia de las Conferencias Internacionales de la UNESCO sobre Educación de Personas Adultas (Elsinore, Montreal, Tokio, París y Hamburgo, 1949-1997) demuestra los cambios de percepción de la educación de personas adultas, desde la alfabetización al aprendizaje a lo largo de toda la vida, en la que la educación de personas adultas es vista tanto como parte del continuo de la educación como una entidad en sí misma. Con el transcurso del tiempo, la postura de los participantes (gobiernos, ONG y expertos) también ha cambiado. Dado que el autor fue miembro de la delegación alemana en varias de estas conferencias, se siente calificado para analizar las actas, así como para describir la atmósfera.

L'HISTOIRE DES CONFÉRENCES INTERNATIONALES DE L'UNESCO SUR L'ÉDUCATION DES ADULTES – D'ELSENEUR (1949) À HAMBOURG (1997): LA POLITIQUE INTERNATIONALE D'ÉDUCATION DES ADULTES PAR L'INTERMÉDIAIRE DES GENS ET DES PROGRAMMES

Résumé

Cet article commence par parler de la création de l'UNESCO et de la conviction fondamentale que les insuffisances humanitaires, sociales et politiques dans certaines sociétés peuvent être corrigées grâce à l'éducation. L'histoire des conférences internationales de l'UNESCO sur l'éducation des adultes (Elseneur, Montréal, Tokyo, Paris et Hambourg, 1949-1997) démontre les changements dans la façon d'appréhender l'éducation des adultes qui, de l'alphabétisation à l'apprentissage tout au long de la vie, apparaît tant comme partie intégrante du continuum éducatif que comme entité en soi. Au fil du temps, la position des intervenants (gouvernements, ONG et spécialistes) a aussi changé. Étant donné que l'auteur a fait partie de la délégation allemande à plusieurs de ces conférences, il se sent à même d'analyser leur déroulement et de décrire leur ambiance.

General features of the UNESCO International Conferences on Adult Education¹

The UNESCO International Conferences on Adult Education – Helsingör in 1949, Montreal in 1960, Tokyo in 1972, Paris in 1985 and Hamburg in 1997 – have been in many ways a professional shop-window for adult education, intended to be seen as marking great leaps forward. When the constitution of UNESCO was signed on 16 November 1945, setting up the organisation, it was required (in Article 1 para. 2) to ‘give fresh impulse to popular education and to the spread of culture’ (Hüfner and Reuther 1996, 14); but it cannot be deduced from this that UNESCO at first gave particular attention to adult education. Rather, adult education was seen – and this has been typical of the intentions of UNESCO almost throughout – as a way of plugging humanitarian, political and social gaps, either by focusing on literacy and basic education in response to social and economic crises in developing countries, or by identifying adult education almost totally with literacy in the 1980s.

I regard it as significant – and here the UNESCO International Conferences differ from the earlier international conference of the World Association for Adult Education organised by Albert Mansbridge in Cambridge in 1929,² which was arguably their predecessor, that they are not primarily concerned with adult education as an academic discipline and do not seek to cover the entire field of adult education, but concentrate on crises that may be mitigated by practical, applied adult education. Hutchins summed up this aim in the simple statement that ‘...We must obtain some clarification if our civilisation is to survive’ (Hutchins 1947, cited in Hely 1962, 15).³ To some extent, UNESCO was still a child of the period after the First World War that was informed by the notions of universal brotherhood, tolerance, help for the needy, the pursuit of peace, and common humanity in one world. Conflicts persistently disturbed that supposed harmony: the rivalry between East and West, the North-South conflict, the new world images of the learning and information society, and the individual manifestations of mass culture and cultural decline. Today, UNESCO undoubtedly adopts a subtler view, the most recent example of this perhaps being the Convention on the Protection of the Diversity of Cultural Contents and Artistic Expressions’ (Paris, October 2005: see Cultural Diversity 2007), and regards diversity as an enrichment rather than still pursuing some vague equalising harmony.

While the first UNESCO International Conference in Helsingör was held simply under the banner of ‘Adult Education’, the title in Montreal was ‘Adult Education in a Changing World’, suggesting that this second conference intended to explore in practical terms what were seen as crises that might be resolved by means of (adult) education.

The comparison may be allowed that the German Education Committee published at more or less the same time a report on the 'Situation and Role of German Adult Education' (German Education Committee 1966, 857 ff.), thus following a similar path. This took as its starting point the diagnosis fashionable at the time, which followed the tradition of cultural pessimism and worries over the spread of mass culture (J. Burckhardt, Ortega y Gasset, G. LeBon, W. H. Auden, O. Spengler and his predecessors Lasaulx and Vollgraff, and Arnold Gehlen: see Stern 2005). It saw the role of adult education as that of guaranteeing the preservation of cultural traditions and acting as mediator in dealing with the new world of the media in its own professional field. However, the UNESCO International Conference in Helsingör already contrasted starkly with British and American adult education, with its wealth of experience, and above all its proximity to actual practice.

Hence, it can already be seen that the way in which the UNESCO International Conferences have developed has generally been by reflecting the spirit and circumstances of the age, while providing at the same time a reservoir of utopian and practical visions of how the world should and could be arranged.

It is self-evident that expert insights have to come from independent persons who stand outside, and the UNESCO International Conferences have therefore never dispensed, or been able to dispense, with *advisers* from universities and NGOs.

However, it has often been forgotten – and this is the second observation – that the International Conferences are first and foremost conferences of the governments of Member States, and that national education policy is intended to feed into international education policy, and vice versa. At the UNESCO International Conference held in Paris in 1985, while the wording of the UNESCO constitution remained the same, the status of the NGOs changed in practice, from that of advisers and observers to active partnership in the management of the conference. Moreover, since the number of NGOs and their influence on national education policy varies from country to country, it became difficult to stick to the principle of 'one country one vote'.

The changes that we have seen since then can be reduced to the following simple formula: growth in the range of agencies, and decline in State commitment.

A clear distinction should therefore be made, in practice and in international law, between the planning stage, when NGOs and independent advisers are expected to contribute their specialist insights, and policy recommendations and formal conventions. If there were to be a retreat from such a division of roles, national education policy would have to comply with conference

recommendations, which would be regarded as binding. Currently, national governments are largely exempted from making such commitments.

If we look at the UNESCO conferences held since then, the outcomes of which have not yet been described, we are left in no doubt that their international impact has varied considerably: there have been highs and lows, and the periodicity of the International Conferences has not coincided with social, political and economic turning points. However, there is no point in looking for an overarching theme at any price if it does not match the moment. The Hamburg UNESCO Conference of 1997, for example, addressed such a wide range of topical issues that are still by no means exhausted, or 'ticked off' in conference terms, that they will need to be looked at again. In terms of international impact, the high points have undoubtedly been Tokyo in 1972, with its subsequent *Recommendations on the Development of Adult Education* (UNESCO 1976), a kind of Magna Carta of international adult education, and Hamburg in 1997, with its *Agenda for the Future* (UNESCO 1997),⁴ 'facing humanity on the eve of the twenty-first century'. The Paris conference of 1985 can probably claim the least impact,⁵ although it represented a considerable internal gain for the industrialised countries (extension of literacy programming to industrialised countries, and educational and working hours regulations, including educational leave).

The individual UNESCO International Conferences on Adult Education in detail

1. The First UNESCO International Conference in Helsingör (Elsinore)

The first UNESCO International Conference on Adult Education, held at the International People's College of Elsinore from 19 to 25 June 1949, was burdened with a number of difficulties, which explains why this first meeting is today viewed somewhat negatively, with the benefit of hindsight.

- The complaint is made, for instance, that adult education was still not generally accepted as a separate entity in the national educational context, that its importance in mitigating or overcoming contemporary problems was not made explicit, and that adult education was still largely defined in terms of the Anglo-American notion of utilitarian education.
- Reference was made to building on the early international meetings of adult educators at the Cambridge Conference of 1929 and on the work done by the Sections of the World Association of Adult Education (e.g. at the Oberhof Conference of 1928), but there was no real evidence that this was done.

In all contemporary and subsequent comments, the fundamental complaint has been made loud and clear that the International Conference ‘remained essentially a West European Regional Conference of Adult Education’. This is demonstrated statistically in the further comment by A.S.M. Hely:

‘Of the 79 delegates and observers who met there, 54 came from 14 European countries and 14 from North America. Eleven delegates represented the rest of the World. Egypt, with one delegate, was the only country represented from the continent of Africa. There was only one delegate from the whole of Latin America. Three delegates, one from China, one from Pakistan and one from Thailand, represented Asia. There were no representatives at all from the countries of Eastern Europe or from the Republics of the USSR’ (Hely 1962, 12; see also UNESCO 1949).⁶

Similarly, the names of those who were invited and actually attended the conference did not adequately reflect the international dimension of adult education at the time. The list of German delegates includes names that are now completely forgotten, and the only name demonstrating any link with the twentieth century tradition is that of Heiner Lotze, who is shown as an ‘observer’, while Hermann (George) Wedell and Alonzo Grace are listed in the wrong place.

However, such reservations, some of them purely formal, do not weigh so greatly in the context of the content of the discussions at the conference and the impact on the international reputation of adult education. Even Hely revises his criticism and states explicitly: ‘The Elsinore Conference undoubtedly marked a big step forward in international cooperation and consultation in the special field of Adult Education...’ (Hely 1962, 12). The overall title of the conference, ‘Adult Education’, itself suggests that the aim was to arrive at a description and critical analysis of the whole field. Given the marginal position of adult education within education policy in most countries in Europe, with the exception of the United Kingdom and Scandinavia, this was no mean goal, and some of the delegates and observers had already helped to enhance appreciation of the value of adult education in their home countries (e.g. Hutchinson and Raybould in the United Kingdom).

The discussions were intended to be grouped around the features of adult education:

- Aims,
- Subject-Matter,
- Institutions and Problems of Organisation,

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- Method and Techniques,
- International Collaboration in the Field of Adult Education (UNESCO 1949, 7–27).

This list matched the commissions that were then set up, the first of which, headed ‘Content of Adult Education’, also covered notions such as lifelong education (from ‘continuing education’ to ‘continuous education’), which was then regarded as outside the mainstream. Overall, it is easy to agree with Roby Kidd that the conference proceedings did produce informed and instructive ‘reflection and introspection’ and a positive expectation that the means of adult education could be used to respond to future social concerns. This was no doubt in line with the widespread assumption still obtaining in industrialised countries that the main problem in planning individual and social life in future would, in addition to political education, be the issue of what to do with increased leisure, and that civic education would be able to offer people ‘purposeful’ activities. This applied orientation of adult education, its supposed ability to make a crucial contribution to plugging social and political gaps, runs through the early history of adult education in UNESCO. It was apparent, for example, in the title of the first conference of the UNESCO Institute for Education, which was set up in Hamburg in 1952, after Elsinore. This conference bore the similarly programmatic title of ‘Adult education as a means of developing and strengthening social and political responsibility’ (UIE 2002, 22 ff.).

2. The Second UNESCO International Conference in Montreal

It was nearly 11 years before the second UNESCO International Conference on Adult Education was held, at McGill University in Montreal, from 22 August to 2 September 1960, although the choice of President, Roby Kidd (1915–1982), was itself significant (see Jarvis 1990, 189). This subversive and extraordinarily well-educated world citizen, who had taken part in the Pugwash conferences and hence belonged to what might loosely be described as the educational Champions League,⁷ stood for an adult education that he saw as innovative, feasible and educationally responsible. He never accepted the lack of government involvement in adult education that was traditional in Europe, not did he abandon his academic independence of mind. He succeeded in attracting allies and academically gifted colleagues to the UNESCO initiative, so that the Second International Conference came to see itself as the international advance guard of adult education in the 1970s. He was concerned not merely with academic expertise, but also with practical professional knowledge. The list of names at the conference reads like a directory of adult education. Was he aiming too high? Perhaps, because the contrast to the first conference proved to be huge. The negative criticism that we found in the earlier literature could not be maintained. The Second International Conference differed from the first in its geographical coverage, in the level of people attending (the German delegates included H. Becker, H. Dolff and H. Landahl),

in its far-sightedness, its tighter organisation, and its accompanying conferences at regional and national level. The future looked brighter for adult education, and there was even an increase in its level of acceptance in government education policy.

This is evident in the statistics. Hely provides the following summary of the wider geographical coverage: ‘...of the 51 countries represented at the Montreal Conference eight were African, ten were Asian and eight were Latin American. There were delegates from the USSR and from Czechoslovakia, Rumania and Hungary. Of the total of 112, only 33 delegates, observers, advisers came from Western Europe’ (Hely 1962, 13). He describes the increased importance attached to adult education in these terms: ‘The increase in the number of countries represented, from 25 in 1949 to 51 in 1960, is partially a measure of the extent to which the importance of adult education was gaining recognition among national governments’ (idem).

The impression of governmental support is strengthened by the demand made by the United States delegation that the number of NGOs acting as observers should be limited, that they should under no circumstances be allowed voting rights, and that particular attention should be paid in future to the governmental nature of these international conferences. The conference report states as follows: ‘The United States of America delegate held that, although it was very desirable that the discussions should benefit from the views of those organisations; the votes should only express opinions of governments’ (UNESCO 1963, 8).

The list of participants reveals notwithstanding that such a rigid approach was not favoured by the majority.

The implications of the high level of the individuals attending the conference are also remarked on by Hely: ‘This is a wide recognition of the contribution being made both in theory and practice by people from many countries, people such as André Basdevant, Jean Dumazédier, A. Léger or André Terris in France, G.H.L. Schouten in the Netherlands; Hellmut ?ecker and H. Dolff...in Germany; Josef Barbag in Poland; Joseph Vinarek in Czechoslovakia; A.M. Ivanova and V.D. Voskresensky in the USSR;...Felix Adam in Venezuela’ (Hely 1962, 58). Not all of those named here actually attended the conference, but they had made their published work available worldwide.

The Second International Conference also chose a title that was also in tune with the spirit of the age: ‘Adult Education in a Changing World’. Admittedly, this had also been addressed by the first conference, and the Montreal Declaration, drafted by Frank Jessup, Head of Extra-Mural Studies at Oxford University as a background discussion paper, began ‘with a bleak phrase about

survival,’ as Roby Kidd put it sharply (Kidd 1974, 26). However, the Montreal Declaration then set out the range of opportunities and ways in which adult education could realistically hope to make provision for individuals and societies with greater self-confidence and enthusiasm than had been possible in Elsinore: ‘We believe that adult education has become of such importance for man’s survival and happiness that a new attitude towards it is needed.’

In Montreal, the focus was on themes that we would still think of as current today:

- Technological Change and the Vocational Education of Adults
- The Liberalisation of Vocational and Professional Education
- Moral Disunity in the World
- The De-Europeanisation of the World
- The Obsolescence of War.

The topics of the working groups nonetheless remained relatively static, going over old ground, and the resolutions that concluded the conference were very broad, expressing wishes that are still unfulfilled.

The conference organisers themselves complained about the overflowing flood of resolutions and the rhetoric in them. The resolutions were set out under headings so systematic that each of them appeared to be indispensable if the entire system were not to be called into question. These headings were:

- ‘Adult Education and World Peace
- Role and Content of Adult Education
- Forms and Methods of Adult Education (including recommendations on the relationship of adult education to film, radio and television)
- Structure and Organisation of Adult Education (e.g. adult education “as an integral part of every educational system”)
- Responsibility of Governments for Adult Education’ (UNESCO 1963, 27ff.).

The enormous impact cannot be explored here in detail, but it should be added that the Second International Conference looked forward already to the third and began to think in terms of a comparative review of the shape of ‘adult education worldwide’.

3. Third UNESCO International Conference on Adult Education in Tokyo

The third International Conference, which took place in Tokyo from 25 July to 7 August 1972, differed from its predecessors in a number of respects (UNESCO 1972d). On the one hand, it was of a more formal nature: the

electoral and decision-making procedures, and the governmental role of the conference, were more strictly observed, there were fewer NGOs attending than in Montreal (UNESCO 1973), adult education sector bodies had observer status and could therefore not put forward arguments to affect decisions, and personal links with Montreal or even Elsinore could be described as marginal, since a new generation was in control of the terrain. The external framework gave the impression of being quantitatively impressive and qualitatively outcome-oriented: 83 countries were represented, principally by the relevant Ministers or by senior Ministry officials, complemented by 'professors from distinguished universities' (Kidd 1974, 26f.) and a few specially selected representatives of 59 adult education organisations that were expected to mediate between practice and academic research (the German delegation included H. Hahn, H. Hamm-Brücher, R. Wilke, A. Vulpius, H. Dolff, W. Mertineit and H. Meisel).

The theme chosen for the conference was 'Adult Education in the Context of Lifelong Education', which was explored more fully in a background document (UNESCO 1972a, 1972c⁸) using up-to-date terminology and looking forward to the programme 'Towards an Educational Society'. Following John Novrup and Roby Kidd, the conference was presided over in Tokyo by Toru Hagiwara, who occupied a leading position in the diplomatic service of his country. The unmistakably changed atmosphere in Tokyo caused Roby Kidd to make two observations, which later led to further discussion in Paris of the future of the International Conferences: '...since 1960 UNESCO had become much more an organisation of governments and much less the domain of individual scholars or academic society', and 'The Conference lacked some electricity, the excitement, the fears and the triumphs of Montreal. It was much more professional and was based on established rules and procedures' (Kidd 1974, 26f.).

A working paper that was written for the conference and had a major influence on the shape it took was by John Lowe, Director of the Extral-Mural Department in Edinburgh, who later worked in the Directorate of the OECD. The paper was based on the country reports by UNESCO national commissions and Member States, and appeared under the laconic title 'Retrospective International Survey on Adult Education, Montreal 1960 to Tokyo 1972' (UNESCO 1972b).⁹ Not only did it heavily influence the structure of the conference, but it also gave rise subsequently to a fierce and provocative debate about methods of comparison in adult education. The description relied on Bereday's so-called 'global approach' and built on the authoritative research work done in comparative education. It led to comparative adult education becoming a separate field of study, which has since then traced its origins to the Exeter Papers and the Nordborg Conference of 1971 and to some other papers by Kidd and Verner (see Knoll 1973; Verner 1975, 1996). The country reports written in isolation were combined by John Lowe into a phenomenological description, with the claim that adult education could be viewed in terms of a

set of conditional factors not restricted by national boundaries. The global approach and country reports have now long since disappeared from academic discourse, to be replaced by the problem approach to international or intranational comparison (ISCAW 2006).¹⁰ However, on the basis of John Lowe's description, the conference was able to focus on key common forms in which adult education manifests itself, even though some doubt was thrown on the comparability of individual points because of differing statistical arrangements. The manifestations of adult education considered were:

- Changing Concepts
- Legislation
- Financing
- Personal (including professionalisation)
- Institutions
- Methods and Techniques
- Research in AE
- International Cooperation.

This way of proceeding allowed the proclaimed theme of the conference to be addressed, while coming closer to the optimistic assumption that the image of a future strategy for adult education could be built on this description.

The conference ended, for example, with a draft statement on the situation and future of adult education, a revised version of which was adopted a short time later by the General Conference of UNESCO under the title 'Recommendations on the Development of Adult Education' (UNESCO 1976). In my view, the value of this document cannot be overstated, because it not only captured the current status of the institutional, methodological and country-specific circumstances of adult education, but also had much to say on adult education in the context of lifelong education, on adult education as basic education (and as EFA), on the development and convergence of adult education and continuing education, and on the concept of unity in diversity. The UNESCO International Conference successfully marked a high point in the discussion of adult education policy from a worldwide perspective; this level of discussion has scarcely been reached again since. However, Tokyo only slowly established itself as a point of reference in national discussion forums, and thought was not given to follow-up strategies until the Fourth UNESCO International Conference in Paris in 1985. A proposal by P. Bertelsen, the former head of the Adult Education Department at UNESCO, to allow discussion of updating the 'Recommendations' at the Hamburg conference in 1997, was defeated. If we were to talk in terms of highs and lows in the history of the International Conferences, then Tokyo would unquestionably be an impressive high point, and the subsequent Paris conference rather more of a low.

4. Fourth UNESCO International Conference in Paris

The fourth UNESCO International Conference held in Paris, from 19 to 29 March 1985, did not take place under the favourable conditions for the intellectual and strategic expansion of adult education that it had obtained before and in Tokyo. While it was realised, or at least expected, that Paris in 1985 would not possess the same inherent impact as Tokyo in 1972, it is extraordinary that the quantitative expansion of governmental responsibility for adult education, and the attention afforded to it, had plainly continued to grow. The number of participants more than doubled by comparison with Tokyo, rising from 364 to 841, the number of Member States attending was 122, and the number of accredited NGOs rose to 59.

The German delegation was made up as follows: because of the devolved nature of responsibility for education, it was headed by the Federal Government (State Secretary P.H. Piazzolo) and the representative of the Standing Conference of Ministers of Education (Minister Schwier), who took it in turns to take the chair; the Federal and Land Ministries of Education had a total of seven representatives; three people formed the group of experts (including W. Mertineit and J.H. Knoll), which incorporated the national UNESCO Commission; and there were four representatives from NGOs (Knoll 1984; UNESCO 1985c).

The theme of the International Conference, 'The Development of AE. Aspects and trends', clearly related to the preceding conference and the recommendations that had been adopted following it. The title is very general and open to interpretation, but a closer examination of the main background paper (UNESCO 1985d) reveals a number of differences reflecting changes in perceptions of how adult education functions, and in the economic spirit of the age.

The conference was presided over by the Minister of Education of Zimbabwe, Dr. D.B. Mutumbuka, thereby acknowledging the steadily growing influence of developing countries. The distance travelled since the early history of the International Conferences becomes apparent in just such details.

At first, the 'Declaration of the Conference' further reinforces the impression that adult education was to go on being expected to play a major part in cultural and social life, once again stressing what might be called its charitable and educational function. But a series of changes can be seen in its characteristics and in the matters raised. First, greater value was placed on the function of keeping and maintaining peace by means of education, and secondly, the economic and employability aspect of the role of adult education was highlighted. Attention should be called in this connection to the 'Principles of Continuing Education' published in the same year by the German Federal

Ministry of Education and Research, which already talks of the 'continuing education market' and the marketability of relevant programmes.

There was also discussion of the changes in the perception of adult education, and John Lowe's 'survey' was enshrined as a permanent task of Member States (UNESCO 1985a). Hermann Müller-Solger, a member of the German delegation, describes his initially positive impressions as follows:

'In the many papers, the matter acquired...a number of new emphases. If the economic, social and cultural role is seen as the core task of continuing education, it can be observed that unlike Tokyo, where the cultural role of adult education was given particular prominence, the emphasis was now on the economic and, to some extent, the social role of adult education' (Müller-Solger 1984, 3).

He picks out a number of specific issues, including the following:

- a. the role of adult education in connection with technological development,
- b. the need for further literacy efforts not only in developing countries, but also in industrialised countries (this aspect lends particular importance to the Paris conference from the standpoint of the industrialised countries),
- c. integration and reintegration, and release from employment for the purposes of continuing education (a resolution to this effect was remitted at the initiative of the German delegation).

However, this report, which was approved by the members of the German delegation, does not gloss over the weaknesses of the conference. These included, and here I would agree, the rhetorical pathos running through the documents and speeches, the lack of efficiency attributable in great measure to the large number of participants and their insistence on speaking at length, the barely disguised political disagreements (e.g. between the representatives of Israel and the Arab States), the ongoing discussion about the reform of UNESCO, and the avoidance strategies adopted in respect of many tricky questions (development of new rules for the International Conferences analogous to those of other international and supranational organisations; e.g. increasing the number and extent of regional conferences, presenting official statements in written form, using a *rapporteur* system, and limiting the number of resolutions, which must have a calculable chance of being implemented).

It is true that this conference also looked forward to the next, particularly by stressing 'recognition of the right to learn' – 'one of the best contributions we can make in solving the crucial problems of humanity today'. Here too,

however, the 1985 conference did not escape its ritualistic rhetoric and lacked the spirit and the realism to set specific goals.

In short, it would be no exaggeration to describe the Paris conference as not particularly well-planned or strategically successful in the history of UNESCO International Conferences, for which the Director-General of UNESCO, M'Bow, must carry considerable responsibility.

5. The Fifth UNESCO International Conference in Hamburg

How impressions vary! While Paris was ritualistic and confusing, Hamburg (14 to 18 July 1997) was excessively visionary and clear. The setting itself was impressive, and hugely increased the awareness of UNESCO in the Free and Hanseatic City, although the presence of the UNESCO Institute for Education had provided an example of international adult education for many years.

As to the figures, the number of participants was well over 1500, and since many people from Hamburg and the environs were interested in the conference, without being participants in the true sense, the actual number attending may have been even higher. In a special issue of the ICAE Report on CONFINTEA V (ICAE 1997), the figure of 1411 participants is given, including '428 representing NGOs'. From these two figures, the report concludes:

'The participation of NGOs also made CONFINTEA V unique among other UN and UNESCO Conferences...NGOs and governments are attending the same conference, for the first time in the history of UN and UNESCO sponsored meetings.'

This statement is based on the false assumption that the International Conferences are designed to be specialist gatherings bringing together governmental and civil society agencies involved in adult education, which overlooks their primary nature as conferences for the governments of UNESCO Member States. That said, the originality and spirituality of the conference came about as a result of the active participation of NGOs in the preparatory conferences and at the International Conference itself.

The Fifth International Conference ended with two documents, the 'Hamburg Declaration' and the 'Agenda for the Future' (UNESCO 1997) which unquestionably need fear no comparison with their predecessors in terms of intellectual level or practical application, particularly if account is taken of the background materials providing a thorough analysis of where we are today. One of the outward aspects, essentially the contribution of the Hamburg UNESCO Institute and its emotionally and intellectually committed Director, Paul Bélanger, was the very busy agenda of the conference, in which plenary sessions of a generally demonstrative nature alternated with intensive working

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groups, the results of which for the first time revealed the state of present-day adult/continuing education on the threshold of the twenty-first century.

The presence of leading public figures gave the event added weight: the President of Germany, Roman Herzog, the Director-General of UNESCO, F. Mayor, the former UN Secretary-General, Boutros Boutros Ghali, and the President of the German Federal Parliament, R. Süßmuth, who was appointed President of the conference.

It is not necessarily an adverse criticism that the event could be summed up for the media in a number of slogans. The call for a set amount of time to be devoted to adult education, everywhere and by everyone – ‘one hour a day – one week a year’ – was easy to apply to national education systems. It was simply grasped, it was effective publicity, and it showed clear thinking about education.

The conference demonstrated its academic credentials in the predictions for adult/continuing education in the twenty-first century, and its practical applicability in the adult education models, schemes and development projects drawn from many regions of the world. This made available a vast wealth and diversity of perspectives, as can be seen particularly in the arrangement of the themes that structured the event and the agenda:

- Adult learning and democracy: the challenges of the twenty-first century
- Improving the conditions and quality of adult learning
- Ensuring the universal right to literacy and basic education
- Adult learning, gender equality and equity, and the empowerment of women
- Adult learning and the changing world of work
- Adult learning in relation to environment, health and population
- Adult learning, culture, media and new information technologies
- Adult learning for all: the rights and aspirations of different groups
- The economics of adult learning
- Enhancing international cooperation and solidarity

The internal criticism that was already being heard by the end of the conference (Knoll 1997, 147) related to the composition and size of delegations, particularly the German, the failure to take account of UNESCO and voluntary sector regional conferences, the tightness of the conference schedule, and the ignoring of adult learning techniques: in other words, the conduct of the conference itself did not reflect the methodology. There could have been other criticisms, such as the plethora of formal statements and the rhetorical style of the speeches, but it must be stressed nonetheless that Tokyo and Hamburg each made a huge impact, albeit in different ways, at a time of change. CONFINTEA V took adult education into the twenty-first century and provided pointers to the

way ahead that will certainly not be followed all the way immediately. There was also a vast amount of discussion, which advanced academic thinking, although without necessarily inspiring government action.

Concluding remarks

It was decided long ago that there should be another UNESCO International Conference on Adult Education, but it has not been easy to find a theme that will unite all likely participants. The world cannot be divided neatly by linguistic common sense, while the 1997 'Agenda for the Future' contains, I feel, such a broad list of themes that it tries to reflect the status and prospects of adult education everywhere in the world. Since, as we are told, the expert review of the follow-up measures in UNESCO Member States has not proved particularly impressive, there is still a mountain of traditional unfinished business left over from Hamburg, which needs to be 'tidied up'. At all events, caution and circumspection will be called for in the choice of words and themes.¹¹

From our historical review of the history of the International Conferences, it is also clear that a considerable number of topics are of perennial relevance. Although I should not like to squeeze this history into a straitjacket of continuity – the people involved and the times in which they operated are too diverse for that – there is nevertheless a set of recurring themes that appear in all the conferences, sometimes more strongly, and sometimes less strongly, sometimes in innovative and sometimes in traditional guise. This arsenal of themes might look as follows:

- Universal literacy
- Creation of peace and international cooperation
- Acceptance of democratic fundamental values
- Expansion of learning opportunities for all age groups
- Equal rights between the genders
- Demand for sustainable development¹²

We have repeatedly stressed the obvious fact that major changes do not occur at regular ten-year intervals to coincide with conferences. There would also be no shame in looking again at the 'Agenda' to give priority to certain themes.

Some thought should also be given to a number of reservations about the form taken by the conferences: the involvement and prominence of NGOs in the UNESCO regional conferences, and the attention paid to expert knowledge, need to be more clearly defined, the number of resolutions, to be submitted in advance in writing, should be strictly limited, procedures should be put in place for conference planning decisions, and the representatives of the governments

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of Member States should not be allowed to evade their political responsibility, which includes ensuring that resolutions agreed are in fact implemented.¹³

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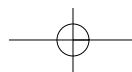
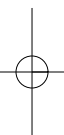
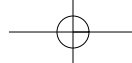
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Notes

- ¹ There is no shortage of internal UNESCO reports on the individual International Conferences on Adult Education (see esp. Hufner and Reuther 1996). The number increases with each conference, reaching a peak with the Hamburg conference of 1997. However, there is a shortage of general overviews that identify common themes (see Knoll 1996, 56ff; 115, which contains a bibliography; for a brief summary see Schemmann 2007, 208f; and in a different context Reuter 1993 ff).
- ² The claim on the part of the World Association for Adult Education to represent a reservoir of tradition surfaces repeatedly at the First UNESCO International Conference on Adult Education in Helsingör. For a short history see Knoll 1996, 22ff.
- ³ Hutchins is, like Cyril Houle, one of the adult educators at the University of Chicago who formulated the concept of lifelong learning before Edgar Faure but both are overlooked in Germany. For a brief mention of Hutchins see Jarvis 1990, 159.
- ⁴ We are not forgetting the reservations about the ability of adult education to influence events put forward, for example, by Wolf (2002).
- ⁵ Besides the issue of the topics addressed, the United States, the Organisation's largest contributor, had left UNESCO because of the dispute over the World Information and Communication Order and was now only represented in Paris by a group of observers with no right to speak.
- ⁶ Hely worked in university adult education first in New Zealand and then in Australia, making a major contribution to international cooperation in adult education in English-speaking countries. His description of the First International Conference is, along with that of Kidd (1974), which concentrates on the themes discussed, now the only reliable report on that event.
- ⁷ By the present day Pugwash has organised nearly 300 conferences and symposia 'seeking cooperative solutions for global problems'; the Russell-Einstein Manifesto and the early Hiroshima Declaration have become particularly well-known. Before the Montreal International Conference, a Pugwash conference was held on continuing education, at which Kidd was involved as an 'influential scholar'. For the origins of Pugwash, see www.pugwash.org

- ⁸ This statistical report probably derives from a suggestion made by the International Conference on University Adult Education (ICUAE).
- ⁹ See also an annotated version in German (Knoll 1974) and a later enlarged version using improved data (Lowe 1975).
- ¹⁰ The conference that produced this useful publication was organised by J. Reischmann.
- ¹¹ For one of the few serious treatments of 'Hamburg' see Schröder-Naef (2005).
- ¹² From a UIL advance notice for CONFINTEA VI.
- ¹³ The large number of preparatory materials for the International Conference cannot be listed here. They report on the rapid planning of regional conferences (in December 2008 in Hungary for the European region) and the proposals for work to be done at the still untitled International Conference in 2009 in Brazil. Besides the documents available on the UIL website, see also UIL (2007).



Timothy Ireland

PARTNERSHIPS FOR LIFELONG LEARNING POLICIES: A BRAZILIAN PERSPECTIVE

Abstract

Brazilian inequality is the result of multiple complex determinations but the heterogeneity with which quality education is distributed among the population remains at its core. When we consider the Brazilian labour market we see that the heterogeneity in the levels of schooling of the workforce is the principle determinant for wage inequality and, furthermore, explains the excess of inequality in this country in relation to the industrialized world in a meaningful way. (Henriques 2004, 3)

The challenge is to base the educational process on an understanding of and respect for the different and for diversity: to have the right to be equal when the difference makes us inferior and the right to be different when equality 'mischaracterises' us.¹

ASOCIACIONES PARA POLÍTICAS DE APRENDIZAJE A LO LARGO DE TODA LA VIDA: UNA PERSPECTIVA BRASILEÑA

Resumen

La desigualdad brasileña es el resultado de múltiples complejas determinaciones, pero la principal es la heterogénea distribución de la educación de calidad que se realiza

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entre la población. Cuando consideramos el mercado laboral brasileño, vemos que la heterogeneidad en los niveles de escolarización de la fuerza laboral es el principio determinante de la desigualdad salarial y, además, explica el exceso de desigualdad en este país con relación al mundo industrializado de forma significativa. (Henriques 2004, 3)

El desafío está en basar el proceso educativo en la comprensión y el respeto de las diferencias y la diversidad: tener derecho a ser iguales cuando las diferencias nos hacen inferiores y tener derecho a ser diferentes cuando la igualdad nos “caracteriza erróneamente”.

LES PARTENARIATS CONCERNANT LES POLITIQUES DE L'APPRENTISSAGE TOUT AU LONG DE LA VIE À L'EXEMPLE DU BRÉSIL

Résumé

Les inégalités au Brésil sont le produit de facteurs complexes et multiples. Toutefois, l'hétérogénéité avec laquelle est distribuée l'éducation de qualité au sein de la population en est la source principale. Prenons le marché du travail dans ce pays et nous constaterons que l'hétérogénéité du niveau d'instruction de la main-d'œuvre est le principal facteur à l'origine de la disparité des revenus et qu'elle illustre, en outre, de façon significative le trop d'inégalités dans ce pays par rapport au monde industrialisé (Henriques 2004, 3)

Le défi consiste à faire reposer le processus éducatif sur la compréhension et le respect de la différence et de la diversité : pour avoir le droit d'être égaux quand la différence nous rend inférieure, et le droit d'être différents quand l'égalité « déforme » ce que nous sommes.

Introduction

The majority of emerging countries like Brazil still face a daunting number of challenges in the field of education which extend from pre-school education to providing education for those denied that right when at school age and include the need to offer quality basic education and learning opportunities for all children, young people and adults. Recent studies have shown that current investments to provide access and permanence in basic education for all school age children are not sufficient to guarantee learning. Educational indicators such as average years of schooling and literacy and functional literacy rates, suggest that Brazil's more immediate challenge is to provide quality basic education for all and hence the focus of educational policies is centred on what

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could be described as lifelong education – the right to education at any point in lifetime – rather with a broader concern with lifelong learning.

However, despite the educational challenges which it faces I want to argue that, particularly in the field of adult and youth education (AYE), Brazil has made considerable advances in attempting to cater for the vast range of learning needs of its huge population of over 185 million inhabitants. Whilst much that is done is still directed at providing basic schooling – literacy and basic education – for those young people and adults who for multiple reasons did not have access to schooling at what is considered the normal age (six to 14 years of age), there is a growing concern with the social relevance of the contents of educational programmes, with the need to treat differently those who have different needs, with the need to valorise and respect diversity in its multiple dimensions and the importance of articulating educational programmes with programmes which seek to provide other forms of learning – in the case of young people, especially those programmes devoted to initial and continued technical and vocational training and the world of work.

The recognition that diversity should be understood as the historical, cultural and social construction of differences and that inclusion in basic education represents more than the total or partial incorporation of the so-called different in school spaces and times which have historically been denied to them is relatively new in Brazilian educational policy as is the recognition that a policy of inclusion which contemplates the differences needs to go beyond the social aspect. Such a comprehension requires a broader and more politicised notion of inclusion which takes as its principle orientation the right to the democratic and public treatment of diversity in contexts marked by inequality and social exclusion. In this sense, educational policies need to be structured with a regard to contributing to an effective discussion on the relation between training, diversity, inclusion and the social quality of basic education. In pedagogical terms it requires a change from pedagogies of homogeneity which attempt to treat all children, young people and adults as equals to pedagogies of diversity which recognise and attend to different needs and demands.

Hence my initial argument is that Brazil is at present seeking to make reality the legal right of all citizens to a minimum of free non-discriminatory education/schooling equivalent to basic education at any point in life. And, at the same time, it is striving to create an educational system which is sensitive and responsive to the vast social, racial-ethnic, regional, generational and sexual diversity in Brazilian society. It is encouraging that the recently announced National Education Development Plan (PDE) covers all levels and modalities of education from pre-school to postgraduate education and includes literacy and adult and youth education as an integral part of its vision of the educational system. The National Fund for the Development of Basic Education (FUNDEB), established in 2007, guarantees stable funding for adult

and youth basic education for the first time in recent history. This then accounts for the current priority for adult literacy and basic education in the field of adult and youth education.

However, despite this optimism we cannot ignore the fact that the distribution of quality education among the population still reflects faithfully the general distribution of wealth in Brazilian society which remains one of the most unequal in the world. In the Brazilian case, the income of the 20% wealthiest is 32 times greater than that of the 20% poorest and the poorest 50% of the population possess 10% of the GNP and, in a perverse reverse image, the richest 10% possess 50% of the GNP. The strong positive correlation between levels of schooling and income, reinforces the current educational priority given to access to and permanence in quality education – schooling, as one of the principal tools for guaranteeing a more inclusive society in which education is not used as yet another form of excluding a large segment of the population from access to their social rights as citizens.

The second argument is that adult and youth education is by its very nature inter-sectoral requiring a complex web of partnerships to realise its potential to be lifelong and life-deep and to offer valid and pertinent learning experiences to those who take part in it. This tangled web of partnerships suggests that any talk of government or better still, State policy is premature despite the advances.

To validate the affirmations made above it is important to start with a brief contextualisation of the current Brazilian situation in social and educational terms and an equally brief incursion into the legal framework which at least guarantees the right to education for all. I then wish to show, with particular reference to adult and youth education policy, how the Brazilian government is attempting to shape a system capable of true and not nominal inclusion whilst at the same time seeking to construct a system based on a complex series of partnerships capable of responding to the diversity of demands of learning. Such partnerships involve not only closer intra and inter-ministerial action and coordination, but also partnerships between the different levels of government (federal, State and municipal), between government and civil society, between the public and private sectors, with universities, international agencies and other international organisations. Finally, I intend to offer three brief studies of essential ingredients for the construction of policies which create new synergies between State and civil society and potential bridges between practices of lifelong education and lifelong learning. The first relates to the creation within the formal structure of the Ministry of Education of a secretariat dedicated to the formulation, coordination and execution of policy in the field of lifelong or continuing education and diversity. The subject of the second is a specific programme entitled Literate Brazil whose focus is adult and youth literacy and whose structure is based on a series of partnerships. The third case represents the force of civil society and its important contribution to the construction of

adult education policy – the movement of the State forums of adult and youth education which was incubated during the period of mobilisation for CONFINTEA V in 1996.

Brazilian social and educational context

In order to understand the context of Adult and Youth Education in Brazil it is essential to situate the discussion within the current social-educational profile of the country. According to data from the Brazilian Institute of Geography and Statistics (PNAD/IBGE 2004) the population of Brazil in 2004 was just over 182 million people. Of this total, 137.7 million are aged 15 years or over and 34 million are in the 15 to 29 age bracket. Of the same total population, 14.7 million are classified as illiterate (with less than one year of schooling) and a further 16 million have less than four years of schooling and are considered to be functionally illiterate. This represents a functional illiteracy rate of 24.1%. If we consider those over 15 who have not concluded primary education (nine years in Brazil²) we have a further 37 million. Thus over 68 million Brazilians over 15 years of age have not concluded primary education which represents almost 50% of the total population over 15 years old. In the 15 to 24 age bracket, 12 million young people have not concluded primary education and almost two million are illiterate.

A further point for concern is the unacceptably low level of provision of places in adult and youth education at primary level. Data extracted from the 2003 PNAD and 2004 School Census reveals that only 7.6% of the 36 million Brazilians over 15 years of age with less than four years of schooling are at present studying. This figure rises to 14.6% for those with between four and seven years of schooling, as can be seen from the following tables:

Table 1: Population over 15 years of age with less than four years of study

Enrolled at school					Not attending school	Total
Total	Regular	Literacy	AYE:1 st to 4 th grade	AYE: cycles		
2.406.223	1.050.716	781.732	181.086	392.689	29.424.955	31.831.178

Source: PNAD/IBGE 2003, Tabulations DAEI/SECAD/MEC

Table 2: % of total population over 15 years of age with less than four years of study

Enrolled at school					Not attending school	Total
Total	Regular	Literacy	AYE:1 st to 4 th grade	AYE: cycles		
7,6	3,3	2,5	0,6	1,2	92,4	100,0

Source: PNAD/IBGE 2003, Tabulations DAEI/SECAD/MEC

Table 3: Population over 15 years of age with between four and seven years of study

Attending school			Not attending school	Total
Total	Regular	AYE:1 st to 4 th grade		
5.276.120	4.827.713	449.148	30.810.478	36.087.339

Source: PNAD/IBGE 2003, Tabulations DAEI/SECAD/MEC

Table 4: % of total population over 15 years of age with between four and seven years of study

Attending school			Not attending school	Total
Total	Regular	AYE:1 st to 4 th grade		
14,6	13,4	1,2	85,4	100,0

Source: PNAD/IBGE 2003, Tabulations DAEI/SECAD/MEC

Despite the investments in recent years, these figures assist us in understanding the size of the challenge to be faced and indicate the existing potential demand for AYE. Above all, they suggest that the right to education and the goals of education for all are still rhetorical assertions.

These educational statistics are reinforced by other social indicators. The total number of illiterates is proportionally much higher in urban areas, 9.7 million against 4.7 million in rural areas, but in percentile terms rural areas have almost three times more illiterates – 26.3% against 8.7% in urban areas. Illiteracy affects the indigenous peoples and Negroes much more than whites (18.1% for indigenous people, 16% for Negroes against 7.1% for whites) and those living in the North-east region of the country more than any other (22.4% in the North-east against the next highest 10.2% in the North region). The literacy rate amongst the poorest north-eastern families is 20 times smaller than among the richest families. With regard to gender bias, the male illiteracy rate is higher than that for women in Brazil (11.4% against 11.1% for women). These same indicators vary little when applied to the functionally illiterate population.

In socio-economic terms there is a clear correlation between illiteracy and low levels of schooling, and levels of income and access to employment. The lower the level of formal schooling, the lower the level of income and the greater the difficulty to access jobs in the formal sector. Of the total population, 55 million Brazilians are considered to be poor and of these 24 million live in conditions of extreme poverty. Again these indicators tend to be strongly correlated with those mentioned above: race/ethnicity, geographical location, and to a lesser degree gender.

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The context of educational exclusion or low educational performance, which is closely associated with other forms of social, economic and cultural exclusion, defines the potential universe of the demand for adult and youth continuing education – approximately 68 million Brazilians. What this challenge represents for the Brazilian government can be better understood if we recall that at present the total number of children and adolescents enrolled in basic education (primary and secondary education) is around 42.5 million (School Census 2005). Furthermore, according to the most recent evaluation of the National Indicator of Functional Literacy (INAF), only 26% of the Brazilian population, in the 15–64 year age bracket, is fully literate.³ The results of this evaluation also reveal that 30% of the population remains at the rudimentary level of reading and writing which means that they are able to read titles or phrases and only identify well-defined information. This reality strongly associated with cultural, economic, housing and unemployment/under-employment restrictions defines the context which generates the potential demand for adult and youth continuing education.

As in many other countries, the call for Education for All was, until 2003, interpreted as primary education for all school-age children. In Brazil, the educational reform carried out during the 1990s focused on primary education for children and adolescents seen as a strategy for preventing illiteracy. Data reveal that for every 100 children who enter primary education only 51 conclude grade 8 and that almost 60% of children who conclude 4th grade are not fluent readers. Secondary education data also raise concern about the quality of the educational process – 42% of those who finish the three years of secondary education are considered to be in a critical or very critical stage of development with regard to reading skills.

The change of government in 2003 resulted in a change in the focus of educational policy. The call of Education for All is interpreted as the right of all citizens to education independent of age or other variables. Hence the challenge is to base the educational process on an understanding and respect for the different and for diversity and, in the words of Boaventura de Sousa Santos, to ‘to have the right to be equal when the difference makes us inferior and the right to be different when equality “mischaracterises” us’.

Legal framework of Adult and Youth Education

The Federal Constitution of 1988 guaranteed the right of all citizens to education and affirmed the obligation of the State to provide free primary education (eight years) for those who did not have access to schooling at what was described as the correct age. Eight years later, in 1996, the National Bill of Education n°. 9394/96 (*Lei de Diretrizes e Bases da Educação Nacional- LDB*), abolished the old distinction between the two subsystems of regular formal education and what was known as suppletive education (adult education) with

the result that adult and youth education was organically integrated into the formal system as a modality of basic education (primary and secondary levels). Although the Bill established that the education offered to young people and adults should take into consideration the characteristics, interests, living and working conditions of the students (Article 37), those enrolled in such classes offered by the State and municipal education systems are included in the official annual school census (*Censo Escolar*). Such courses were, until the end of 2006, financed by the local State and municipal governments with some financial and technical support from central government by means of a programme known as Making School (*Fazendo Escola*). With the end of the Primary Education Development Fund (FUNDEF), in 2006, from which AYE had been explicitly excluded, and its substitution by the Basic Education Development Fund (FUNDEB), in 2007, which will include permanent automatic funding for adult and youth education, this type of school equivalency will finally have a stable source of financing for the first time.

In conceptual terms, all recent legislation since the new Federal Constitution of 1988 refers to 'adult and youth education', the term 'adult and youth' referring not to all adults and young people but specifically to those who have been denied access to formal schooling or who, for multiple reasons, have not concluded the minimum of primary education. Whilst the legislation refers more specifically to the provision of equivalency schooling it also opens the possibility of a more flexible provision to the State and municipal systems and other providers. The National Plan of Education (*Plano Nacional de Educação – PNE*), Law nº 10.172, sanctioned in January 2001, established the first goal of adult and youth education as that of implementing literacy programmes with a view to attending ten million young people and adults in five years and 'eradicating' illiteracy by the end of the decade (2010). It also set goals for the conclusion of the two segments which make up primary education by those young people and adults until then excluded from regular education. There is little chance of these goals being met. Finally the Presidential Decree of September 2003 (nº. 4834) created the Literate Brazil Programme (*Programa Brasil Alfabetizado*). This programme is financed with resources established in the annual budget of the Ministry of Education.

Thus, in a sense, the concept of adult and youth education has become strongly associated with the more formal dimension of schooling which, when faced by the statistics cited above, is quite understandable. On the other it is also used to refer to practices more traditionally associated with non-formal education – alternative schooling, life skills and community development, vocational training and income and employment generation programmes. In historical terms the concept of Popular Education has tended to have wider currency and to have embraced educational practices outside the system. The focus of the concept of AYE is the subject of the educational process and not the nature of the provision – formal or non-formal.

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Brazil possesses a firm legal base for AYE as equivalency schooling with important dimensions including the obligation of States and municipalities to offer AYE gratuitously within their educational systems and to respect the specificities of the modality. These are clearly important instruments for the formulation of policy but are not sufficient to guarantee the translation of law into reality. In educational discourse the broader concepts of continuing education and lifelong learning/education, used in this context as educational activities which go beyond equivalency schooling, are common but possess little legal support. Although the Brazilian government delegation signed the Hamburg Declaration during CONFITEA V in 1997, with its vision and concept of adult learning as a process which accompanies people throughout their lives and ‘encapsulates the whole process of formal and informal learning, in which people considered by society as “adults” develop their skills, enrich their knowledge and improve their technical and professional qualifications, directing them to the satisfaction of their needs and those of society’, the Declaration has never been formally ratified by the Congress.

Role of partnerships in Adult and Youth Continuing Education policy

The concept and use of partnerships in the field of AYE is frequently accepted as standard practice and in many cases as unquestionably positive. Clearly the multi-faceted and inter-sectoral nature of adult education demands the involvement of a broad and varied series of social actors from different spheres of action and not just those whose specific mission is education. In the Brazilian case, the solution to the critically low levels of schooling amongst large segments of the population has involved partnerships between federal, State and local governments, civil society organisations including NGOs, universities and social, popular and trade union movements, and some elements of the private sector. It is worth questioning why successive governments have made such frequent and insistent use of this strategy to develop so-called public policy in the field of adult education when this practice has been significantly less used in other modalities of education. It raises a doubt concerning the true focus of partnerships: the search for quality and plurality that this diversity can offer or a simple measure of cost-cutting or delegation of responsibility: for the poor, a poor option, while formal education systems are guaranteed more stable financial and human resources.

At the federal level of government the search for a positive synergy between ministries with actions which contemplate forms of adult learning in different fields has led to a series of formal and less formal agreements within the Ministry of Education itself and between ministries as a means of optimising efforts and resources to the benefit of adult and youth continuing education. Successful partnerships have been built with:

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- Ministry of Justice
- Ministry of Labour and Employment
- Ministry of Social Development
- Ministry of Agrarian Development
- Ministry of Health
- Ministry of Culture
- Special Secretariat of Human Rights
- Special Secretariat of Aquiculture and Fisheries
- Special Secretariat for the Promotion of Racial Equality
- National Secretariat for Youth

There has been a growing tendency to develop programmes which include two different but complimentary types of learning: school equivalency integrated with initial and continuing professional training. This has been a strong characteristic of programmes developed with the Ministry of Labour and Employment and others. However, it would be difficult to affirm that there exists a coordinated government policy of adult and youth continuing education. There frequently exist overlapping programmes whose objectives are not articulated, particularly those aimed at young people.

Within the Ministry of Education itself programmes dedicated to adult and youth continuing education are not the exclusive right of one Secretariat. Whilst the Secretariat of Continuing Education, Literacy and Diversity (SECAD) clearly plays a leading role in the formulation of policy and programmes other Secretariats also offer programmes for the same public. The Secretariat of Vocational and Technological Education (SETEC) has developed two programmes which integrate equivalency schooling with professional training whilst the Secretariat of Distance Education (SEED) and the Secretariat of Basic Education (SEB) are particularly concerned with the training of teachers.

At federal level a further initiative has attempted to articulate and coordinate support given by State companies to different educational programmes. The State Companies Education Forum was constituted with the objective of developing and coordinating actions which seek to offer support for public education policies promoted by the Ministry of Education by means of partnerships with State companies. In the field of adult and youth continuing education this support has been directed particularly at the national literacy programme.

Further essential partnerships are those between the federal government and State and municipal governments who are responsible for the offer of adult equivalency schooling at both primary and secondary levels within their education systems. This has led to constructive if at times tense relationships with two organisations which represent the State secretaries of education (CONSED) and municipal secretaries of education (UNDIME).

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Within the field of adult education worldwide, universities have traditionally played an important role not only in the training of teachers but in the implementation of educational programmes through extension services and in the field of research and methodological development. Whilst a number of universities have responded positively to the demand for more consistent action in this field, the enormous existing potential is still considerably undeveloped. AYE has never attracted the same level of funding as other levels and modalities of education and consequently the level of interest and research within public universities (with some honourable exceptions) has been notoriously low.

Finally, partnerships with international agencies and organisations representing civil society have played an important role in both establishing and divulging agendas and at times of reminding national governments of responsibilities assumed within international agreements/conventions. This has been particularly true of the field of adult and continuing education where organisations like Unesco, the Organisation of Iberoamerican States (OEI), the World Labour Organisation (WLO), the European Commission and others have at times showed greater sensitivity for questions related to adult and youth continuing education than national entities. In Latin America, the Latin American Council for Adult Education (CEAAL) and the International Council of Adult Education (ICAE) have both played important roles. In Brazil's case, international cooperation for the developing of programmes in this field has not played a substantial role and the national government has increasingly invested in policies of south-south cooperation including the field of education. Brazil's participation in the Centre of Regional Cooperation for Adult Education and Functional Literacy for Latin America (CREFAL), situated in México, has been timid but has shown signs of growth. Just as we have identified the need for stronger linkages between the different Brazilian ministries there is an equally strong need for greater coordination between international organisations working in the same field developing initiatives which are frequently parallel and not integrated.

There is little doubt though that given the diversity of subjects and learning needs the recurrence to the strategy of partnerships has been an essential element for policy in the field of adult and youth continuing education. Such partnerships were understood not so much as substitutes for government action but as a more efficient way of applying government resources and developing learning contents and strategies to satisfy expressed demands of different segments of society. The detailed nature of these partnerships will become more apparent in the following section in which we present three brief studies of different elements which make up this complex construction.

Three illustrative case studies

1. Secretariat of Continuing Education, Literacy and Diversity (SECAD)

One of the most significant changes in government policy from 2003 onwards was the political recognition of the right of all citizens to education as a fundamental human right that at certain moments requires special provision for those segments of the population living in precarious social conditions. The concept of education as a right for all, and the ethical and historical considerations which underpin it, demands recognition of the existence of a diversity of realities and subjects. Consequently, educational policies require cooperation between society and public power to re-define the sense of partnership that had been lost over the previous years: education seen as part of the process of building a conscious and active sense of citizenship, respecting the plurality and the specific needs of individuals.

To achieve this end, the government agenda for education has been oriented towards large-scale collaboration between the three levels of government – federal, State and municipal – and society as a whole, so that joint efforts can produce results in the shortest possible time in response to the main challenges posed by the country's historic educational debt. Such a response cannot clearly be limited to one-off short-term solutions but needs to be defined within the perspective of lifelong education establishing commitments to democratising education systems and to creating instruments, which guarantee education for all.

In concrete terms, the Ministry of Education created, for the first time in the history of its administrative structure, a secretariat dedicated to this programmatic field. The Secretariat of Continuing Education, Literacy and Diversity (SECAD) – seeks to translate its title into action on the basis of three organisational axes. 'Continuing Education' expresses the focal point of the agenda for young people and adults, which goes beyond the limits of formal schooling and emphasises the idea of lifelong education, above all for the millions of Brazilians who have not yet benefited from access to school. 'Literacy' expresses the political priority and focus on citizenship. 'Diversity' represents the powerful concept not only of educational inclusion but, above all, of respect for, proper treatment of and full value for the multiple aspects of Brazil's ethnic-racial, cultural, gender, social, environmental and regional diversity.

The special treatment given to AYE, contemplating literacy and the whole process of learning, both formal or informal, has attempted to structure an agenda directed by the goal of linking the improved quality of education systems to the construction of the foundation for equity and educational inclusion, giving priority to the elements of ethnic-racial, cultural and regional diversity which characterise the Brazilian population.

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Despite the size of its 'educational debt', the country has advanced over the last two decades in the direction of making basic education universal, amplifying opportunities of access and successful permanence for diverse social groups and of incorporating part of its rich socio-cultural diversity into the educational system. However in order to guarantee more satisfactory results for this process, the government has developed a set of policies directed specifically at those historically marginalised social groups and included the theme of diversity in school curricula as a way of attempting to guarantee greater acceptance for the country's socio-cultural wealth. Within diversity are included such themes as environmental education, education for human rights and questions related to gender, sexual identity and orientation and to facing the diverse forms of discrimination which tend to reinforce and perpetuate Brazil's deeply rooted inequality. Such policies of inclusion and diversity have been directed preferentially at the adult and youth population who are either illiterate or possess low levels of schooling, afro-descendents and 'quilombolas',⁴ rural populations, indigenous people, women, children and adolescents in situations of risk and social vulnerability, the prison population, adolescents and young people deprived of their liberty and interned in social-educational institutions.

Thus, SECAD's principle objective has been to contribute to the offer of quality education which guarantees access, permanence and success for these specific publics in all levels of education and to strengthen the concept and practice of inclusive education as a means of overcoming inequality. This policy has required the setting up of a series of partnerships with the municipal and State systems of education, with civil society organisations, with universities, social movements and other organs of government and international organisations.

Whilst this policy is still largely concerned with access to formal schooling at any time in life, it also launches the seeds for a broader policy of lifelong learning. This can be judged from the following themes and groups which integrate the policy under construction:

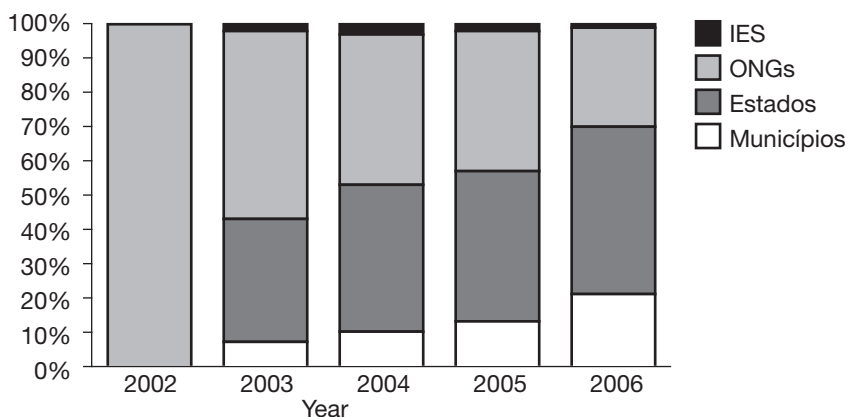
- 1 Literacy and primary education for young people and adults including the prison population;
- 2 Indigenous school education;
- 3 Education for rural populations;
- 4 Education for 'quilombola' communities;
- 5 Support for socially disfavoured groups to gain access to the university;
- 6 Education for ethnic-racial diversity and the valorising of afro-Brazilian history and culture;
- 7 Environment education;
- 8 Complimentary educational actions for children and adolescents in situations of risk and social vulnerability;
- 9 Education in human rights, including education for questions of gender, sexual identity and orientation;

10 International cooperation with a view to exchanging experiences on the above themes.

2. The Literate Brazil Programme

The Ministry of Education's strategy has been that of giving priority to the articulation between educational inclusion and literacy. Literacy has been understood as a gateway to citizenship and to further educational opportunities for young people and adults in the perspective of access to education for all as a lifelong right. In addition to being a *right*, the linkage between literacy and programmes of social inclusion is seen as strategic to the re-definition of the horizons of citizenship. Links within the federal sphere and also with local State and municipal programmes and links between literacy and the income transfer programme (*Bolsa Família*) have permitted an important focus on those living in extreme poverty. In this sense, the literacy and AYE agenda constitutes an integral part of the structural base of *inclusion*. The articulation with vocational courses expresses the role of literacy as gateway to inclusion and citizenship.

The Literate Brazil Programme was set up in 2003, structured around a complex series of agreements with State and municipal governments, non-governmental organisations (NGOs), and other public and private enterprises, including public and private universities. It is important to note that from 2004 literacy was developed, not as an end in itself but as an integral part of continuing education. This gave rise to the policy of preferential funding for public education authorities (States and municipalities) which offer primary education to students completing literacy classes and led to a considerable change in the profile of partners involved in the programme. Up until 2002, the large majority of literacy efforts were executed by NGOs. From 2003, as the following graph demonstrates, the responsibility of State and municipal governments has grown strongly in line with the amplified concept of literacy.



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Basic funds for developing the programme are provided by the Ministry of Education and are transferred directly to public institutions. In the case of NGOs, higher education institutions and private enterprise, funds are transferred after their pedagogical projects have been analysed and approved and learners, literacy teachers and coordinators registered. Many entities complement the basic funding with resources from their own or other sources. Partner institutions are responsible for training teachers, enrolling students and organising the whole teaching process, which includes: classroom space, teaching materials, supervision, evaluation and monitoring. One of the chief characteristics of the programme is its methodological plurality. Partners, whether public or third sector, are free to use the teaching method that best suits the specific community or segment with which they work, as long as they guarantee that learners will be able to read, write, understand and interpret texts and carry out basic mathematical operations by the end of the course. The Ministry of Education establishes a minimum number of hours for initial training (30 hours) and a minimum for continued training (two hours per week) for courses with a minimum of six months duration (240 hours) and a maximum of eight months (320 hours).

The table below demonstrates the evolution of the programme over the four years from 2003–2006, in terms of the number of students attended, the number of municipalities covered (remembering that Brazil has a total of 5.563 municipalities), the number of other partners involved (under the generic title of NGOs and universities) and the volume of central government funds invested in Reals R\$.

The potential subjects of the programme are all those over 15 years of age who have less than a year of schooling with a special focus on certain segments which for diverse reasons have had greater difficulty in obtaining access to and in guaranteeing permanence in educational programmes – fishermen and women, prisoners, young people with low educational skills, adults and young people with special learning needs (especially blind and deaf) and the indigenous population.

Due to high illiteracy rates in the North-east region, that region has tended to receive a considerably higher proportion of funds than others – approximately 65%. In 2007, the programme is offering special support for 1103 municipalities whose illiteracy rates were, according to the Census of 2000, over 35%. Over 90% of these are situated in the North-east.

3. State forums of AYE

Developments in the field of adult and youth education in Brazil have never been reduced to government action and initiatives. Activities formulated and executed by civil society in the field of popular education, by means of

Table 5: Evolution of coverage of National Literacy Programme

Type of entity	Number of projects				Literacy students			
	2003	2004	2005	2006	2003	2004	2005	2006
Municipalities	149	307	567	592	113,078	177,084	235,394	343,820
States	17	24	22	22	555,981	717,166	869,135	818,409
NGOs	17	45	47	58	967,853	777,479	821,661	496,144
Universities	5	6	6	6	31,341	45,500	39,942	7,375
Total	188	382	642	678	1,688,253	1,717,229	1,966,132	1,655,748

Source: MEC/SECAD, 2006.

* Target established by the Ministry

religious and trade union movements, the business sector, neighbourhood associations, youth groups and clubs for the elderly, or even the task of covering the deficit in the supply of basic schooling for young people and adults, demonstrates the important contribution of these actors in the field of AYE. In this sense, the true subjects of the history of AYE in Brazil, in addition to the young people and adults themselves, are collectives representing governments, NGOs, international organisations, workers and owners, trade unionists and social movements which are, in some form, doing adult and youth education in the complex and diverse Brazilian reality.

These collectives are well represented by the State Forums of Adult and Youth Education, whose first expressions were initially inspired by the process of mobilisation set in motion by UNESCO for the fifth International Conference on Adult Education (CONFINTEA V), held in Hamburg in 1997. The first State to take this initiative in 1996 was Rio de Janeiro and has been followed over the decade by all other States. There are now 27 state forums⁵ and a series of regional forums. These tend to be founded in larger States where distance makes it difficult for all those involved in AYE activities to take part in meetings generally held in the State capital. Although each forum has its specificities, all are based on an articulation between the different segments which are engaged in the field of AYE: government, universities, the 'S' System, NGOs and social and trade union movements. Perhaps the most notable absence in the majority of forums is that of the principal subjects of the process – the students.

The forums constitute a democratic, critical and plural space for articulation in which the principal discussions revolve around the construction of local and national policies for AYE as well as providing important opportunities for exchanging experiences in the fields of training and methodology. The confrontation between theoretical conceptions and diverse methodological proposals requires the exercise of the democratic spirit of coexistence and

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Resources invested (R\$)							
2003	%	2004	%	2005	%	2006	%
11,981,589.17	7.4	16,871,728.00	10.1	26,088,849.00	12.5	37,324,982.00	20.7
57,905,143.65	35.7	72,357,733.00	43.3	93,376,386.72	44.8	90,165,012.00	50.0
88,844,064.99	54.8	73,738,655.20	44.1	84,406,095.10	40.5	51,837,567.04	28.7
3,392,672.00	2.1	4,211,833.30	2.5	4,485,297.00	2.2	1,025,990.00	0.6
162,123,469.81	100.0	167,179,959.50	100.0	208,356,627.82	100.0	180,353,551.04	100.0

recognition of plurality and diversity as the basis of a democratic society. The space created by the forum movement also provides opportunities for a greater degree of linkage between the different actors involved without denying the obvious differences and tensions which are not always easy to overcome.

The synergy generated among the forums has made it possible to organise a series of annual national meetings since 1999. The National Meetings of Adult and Youth Education (ENEJAs) (now in the ninth edition) have maintained their independent nature despite receiving funding and support from a series of organisations: CONSED, UNDIME, SESI and UNESCO, and, more recently, from several government ministries, particularly the Ministry of Education. The meetings are carefully documented and a final report synthesising reflections, recommendations and decisions taken is produced and widely publicised. Since 2004, the Ministry of Education has developed a productive dialogue with the forums – clearly not without its tensions – holding twice-yearly meetings to discuss, define and validate policy proposals. There is little doubt that the forum movement, despite its limitations, constitutes one of the most important expressions of AYE in recent years and provides an excellent foundation for the process of mobilisation for the sixth CONFINTEA in 2009.

Final considerations

Inequality and exclusion: clearly in the Brazilian case, despite all recent efforts both to achieve the EFA goals and the MDGs, inequality and exclusion are still reflected in the way education is distributed amongst the population and tend to reinforce deep-rooted differences between rich and poor. Investments in education in general and in adult and youth continuing education have grown but the size of the deficit poses an enormous challenge. UNESCO estimates that the Brazilian government needs to invest at least 6% of the GNP in order to make a real impact. Present investment constitutes less than 5%. With a

population of 68 million young people and adults over 15 who have not concluded primary education the foundation for lifelong education is still suspect.

Diversity of needs and unequal distribution of learning opportunities: the statistics reveal not only the enormous variety of needs but the existing unequal distribution of learning opportunities amongst the population. Income, race/ethnicity, gender, urban/rural location, generational factors and regional origins still exercise a strong influence over the distribution of learning opportunities. The attached tables provide further evidence for these assertions.

Role of partnerships: evidence shows that partnerships can provide an important foundation for the provision of lifelong learning opportunities. At the same time, in the field of adult and youth continuing education the government's role in formulation, coordination and funding of policy is irreplaceable. Partnerships should not be used as a substitute for government action as has frequently been the practice in the past. The concept of partnership should be a positive and propositive policy recognising that education and learning are the responsibility of the whole society and that the multiple dimensions and needs of learning require multiple agencies. There is, however, a need for government to screen potential partners based on transparent criteria in order to guarantee the basic standards and quality of the services provided.

From lifelong education to lifelong learning – from homogeneity to heterogeneity: the basic learning skills offered by the education system, both formal and non-formal, are clearly fundamental rights and essential for citizenship and for lifelong learning. In this paper we have been largely concerned with equivalency schooling and other more organised learning opportunities for out-of-school adults and young people. However, the rich Brazilian tradition of popular education provides other frequently more socially relevant learning for those who take part. Much could be learnt by the formal education systems from popular education experiences in particular with regard to their concern to take the learner's knowledge and skills as the starting point for the learning process, recognising the diversity of needs and the wealth of experience and the necessity to respond with a variety of methodological answers which respect and valorise existing skills and competencies.

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Notes

¹ Quoted by Boaventura de Souza Santos in his speech at the XXXV Congress of the International Federation of Human Rights, held in Quito, Ecuador, in March 2004.

² Primary education in Brazil was, until very recently, composed of eight years of schooling divided into two segments: 1st–4th grade and 5th–8th grade. For children the obligatory period of schooling is from seven to 14 years of age. A law passed in February 2006 extended the period of obligatory schooling to nine years: State and municipal systems were given until 2010 to implement this measure although 55% have already included this additional year in their systems.

- ³ INAF – 5th National Indicator of Functional Literacy (Evaluation of Reading and Writing) – Paulo Montenegro Institute and Ação Educativa: São Paulo, September 2005.
- ⁴ Communities made up in the past by former runaway slaves.
- ⁵ Forums in 27 states: South-east — Rio de Janeiro, Minas Gerais, Espírito Santo, São Paulo; South — Rio Grande do Sul, Santa Catarina, Paraná; North-east — Paraíba, Rio Grande do Norte, Ceará, Alagoas, Bahia, Sergipe, Pernambuco, Piauí, Maranhão; Central West — Tocantins, Goiás, Mato Grosso, Mato Grosso do Sul, Distrito Federal; North — Acre, Amapá, Amazonas, Pará, Rondônia, Roraima. Regional Forums: RO — Ji Paraná; MG — Vale das Vertentes, Norte, Nordeste, Leste, Oeste e Zona da Mata; SP — Nordeste paulista e Oeste paulista; BA — Extremo Sul; RS — Serra, Litoral, Fronteira, Santa Cruz, Central, Pelotas, Noroeste, Porto Alegre, Grande Porto Alegre.

Carolyn Medel-Añonuevo

THE POSSIBILITIES OF TRANSFORMING ADULT LEARNING AND EDUCATION: THE CHALLENGE OF CONFINTEA VI

Abstract

This article's starting point is a brief look at the changing political environment in which the preparation of CONFINTEA VI needs to be seen. It seems that the complexity with which people and their organisations have to cope is growing – the world of today is more complex than we had during the last conference in 1997. The UNESCO Institute for Lifelong Learning (UIL) is the key institution in the process towards the Brazil conference twelve years later. The article looks at the work done by the CONFINTEA VI Consultative Group, the National Reports on where we are in adult education at the country level, the purpose of a Global Report on Adult Learning and Education (GRALE) coming up, and what we should expect from the regional pre-conferences and the global event as well.

LAS POSIBILIDADES DE TRANSFORMACIÓN DE LA EDUCACIÓN Y EL APRENDIZAJE DE ADULTOS: EL DESAFÍO DE LA CONFINTEA

Resumen

El punto de partida es una breve mirada al cambiante entorno político dentro del cual se tiene que considerar la preparación de la CONFINTEA VI. Parece que está creciendo la complejidad que tienen que enfrentar las personas y sus organizaciones, el mundo de hoy es más complejo que el que teníamos cuando se celebró la última conferencia de 1997. El Instituto de la UNESCO para el Aprendizaje de por Vida (UIL) viene a ser la institución clave en el proceso hacia la conferencia de Brasil doce años después. El artículo se concentra en el trabajo realizado por el Grupo Consultivo de la CONFINTEA VI, los informes nacionales sobre el momento en que nos encontramos en educación de adultos en el nivel de país, el objetivo de un Informe Global sobre Educación y Aprendizaje de Adultos (Global Report on Adult Learning and Education – GRALE) resultante de todo ello, y sobre lo que deberíamos esperar tanto de las pre-conferencias regionales como del evento global.

LES POSSIBILITÉS DE TRANSFORMER LA FORMATION ET L'ÉDUCATION DES ADULTES

Résumé

Cet article s'ouvre sur un aperçu du contexte de mutation politique dans lequel nous devons considérer que s'inscrivent les préparatifs de la CONFINTEA VI. Il semble que les gens et les organisations doivent faire face à une situation d'une complexité croissante : le monde d'aujourd'hui est en effet plus complexe qu'il l'était lors de la dernière conférence en 1997. L'Institut de l'UNESCO pour l'apprentissage tout au long de la vie (UIL) est l'organisme principal dans ce processus nous conduisant douze ans plus tard à la conférence qui se déroulera l'an prochain au Brésil. Le présent article se penche sur le travail réalisé par le groupe consultatif sur la CONFINTEA VI, sur les rapports nationaux présentant la situation de l'éducation des adultes au niveau des pays, sur le rapport mondial à paraître concernant la formation et l'éducation des adultes (GRALE) et sur ce que nous devrions attendre des conférences régionales liminaires ainsi que de la conférence internationale.

Of all the phases of lifelong learning, adult learning is the one most taken for granted. It is commonly assumed that adults, responsible as they are, will take care of their own learning. Providing learning opportunities for them either in formal and non-formal settings is, therefore, not considered a priority by many governments, since it is widely assumed that adults are capable of negotiating for such opportunities on their own, and in any case receive and benefit from day to day informal learning. The holding of an international conference on

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adult education (CONFINTEA as it is known in the French translation) every twelve years is therefore highly significant as it enables the global community to focus on the trends and challenges in the area of adult learning and education (ALE) and in so doing highlights its importance for our societies.

Held almost sixty years ago, the first CONFINTEA was organised in a post-war world where many countries still had to gain their independence from their colonisers. It has always been hosted by an industrialised country (Denmark, 1949; Canada, 1960; Japan, 1972; France, 1985; and Germany, 1997), an indirect indicator that such countries put high premium in adult education. The sixth CONFINTEA – the first to be held in the 21st century – will also be the first to be hosted by a country from the South: Brazil. The first and the succeeding World Social Forums were also held in Brazil, where representatives of civil society in their thousands came together under the slogan ‘Another world is possible’. It should also be noted that in the last CONFINTEA, held in Hamburg, there was no need for the separate NGO forum which characterises many UN conferences. Representatives of non-government organisations actively took part in the program and their contributions were integrated in the conference outcome, the *Hamburg declaration of adult learning* and the *Agenda for the future*.

While the key issues of adult education raised in the five previous CONFINTEAs (i.e. the relevance of adult education in development, the importance of reaching the most vulnerable, policy and financing, quality, the need for qualified adult educators, funding) remain basically the same, the context in which learning and education takes place has evolved to become more complex. The contradictions in different levels of our societies are more pronounced as wanton affluence exists side by side with extreme poverty. In some parts of the world where communities are increasingly polarised due to religious or political beliefs, violence is becoming a way of life for many. The promise of democracy is being realised as enabling decentralised political structures allow citizens to participate in decision making at the local level. Meanwhile, in other parts of the world, this same promise is being threatened by highly tyrannical political structures that prevent citizens exercising many of their basic rights. The analysis of the implications of specific country contexts for the politics and practice of adult learning and education needs to be complemented by a perspective that considers the role of globalisation in influencing national and local realities.

Indeed more than at any time in the world, the 21st century has ushered in an era of intense connectivity of countries, communities and citizens whether in the areas of economic or development policies, education discourses or lifestyles. Agreements, whether they be for trade (e.g. World Trade Organisation) or climate (e.g. Kyoto Protocol), bind more and more governments. The Millennium Summit held in 2000, so far the largest assembly of Heads of State

from all over the world, agreed on the Millennium Development Goals (MDGs) as a set of development objectives for countries to achieve by 2015. Meanwhile, education ministers across the globe either ensure that their Education for All (EFA) goals are met or look at the PISA (Programme for International Student Assessment) standing of their countries. Complete strangers are now able to exchange ideas or their own work through Facebook, MySpace or YouTube. We are living in a world where people are not only connected but also able to communicate simultaneously with many individuals.

It is within this environment that CONFINTEA VI is being prepared and organised. To respond to and build on such context, the UNESCO Institute for Lifelong Learning (or UIL: the UNESCO unit primarily responsible for organising this meeting) has put in place four important measures that it believes will make CONFINTEA VI a key advocacy space for adult learning and education.

As part of the regular reporting process, a questionnaire was sent to member states requesting governments not only to assess the state of adult learning and education within the education sector but also to ensure that other sectors (e. g. labour, agriculture) are also covered. Given that the NGOs are key actors in ALE, the UIL also indicated that such assessment could be done in a participatory manner with the involvement of the wide range of stakeholders. With the principles of transparency and accountability in mind, the UIL has uploaded the submitted reports to the CONFINTEA website. This has allowed all stakeholders not only to read and learn about their countries' assessment but also to track developments in other countries. The virtual sharing of the reports was not imaginable at the time of CONFINTEA V but the developments in ICTs and the consequent popularisation of the Internet has paved the way for a democratisation of the reporting process.

Five regional conferences (Africa, Arab, Asia, Europe and North America, and Latin America and the Caribbean) are being organised to prepare for CONFINTEA VI. In contrast to CONFINTEA V, these meetings will be used not only to share the trends and developments in the countries but also, more importantly, to formulate regional recommendations using the regional report that has been prepared based on data coming from the national reports. The meetings are intended to be highly participatory, with stakeholders having a hand in shaping the outcomes of the meeting.

A Consultative Group, composed of representatives from governments, NGOs, academe, bilateral and multilateral agencies has been meeting since March 2007 to advise the UIL as it prepares for CONFINTEA VI. The diversity of this group has allowed UNESCO to have a broader and more inclusive perspective. More importantly, their involvement has evolved from merely providing advice into actively accompanying the process. For example,

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members from the NGO community in the Consultative Group have called on their networks to take a more proactive stance in the reporting process. The UN Food and Agriculture Organisation (FAO) has featured the organising of CONFINTEA VI as one of the activities of the Education for the Rural People Programme. Finally, it should also be noted that one of the recommendations coming out from the first meeting is the preparation of a report on ALE.

The Global Report on Adult Learning and Education (GRALE) is conceived to be both an advocacy and reference document. There has been no previous comprehensive analysis of the global situation of adult learning and education for many reasons, among which is the difficulty of gathering information given the diverse and dispersed nature of the field itself. Yet it has been shown that global reports like the Human Development Report and the Global Monitoring Report for EFA can significantly contribute in drawing attention to critical issues. With these considerations in mind, the Institute has constituted an editorial and writers team to help in producing GRALE, which is going to be based on 1) national reports; 2) regional reports; 3) existing initiatives of bilateral and multilateral agencies; and 4) a review of secondary literature. The triangulation of data sources will ensure that there is some cross-checking and validation. The unevenness of the quality of the national reports as well as the political nature of reporting have been raised by the GRALE team, and it is expected that by bringing in different sources, a more balanced and realistic view will emerge. This is important as CONFINTEA VI is conceived to be a space where the evidence for ALE will be able to speak for itself. As an evidence-based document, GRALE is thus expected to provide a synthesis of trends and issues which will be among the key sources of recommendations for the meeting in Brazil.

The organisational challenges of preparing for a participatory CONFINTEA VI that would push for a renewal of commitments to ALE through clear evidence and partnerships is slowly being addressed by the above measures. The other related challenge is to be able to ensure that the outcomes of this sixth international meeting on adult education will be able to transform the status of the field so that it is duly recognised and provided with the necessary resources. In this regard, four inter-related issues need to be considered.

Lifelong learning as a policy discourse has been increasingly adopted in many countries since the last CONFINTEA V in 1997. But it was as early as 1972 that UNESCO, through the Faure Report, proposed the adoption of 'lifelong education as the master concept for educational policies in the years to come for both developed and developing countries'. Twenty-four years later, UNESCO produced the Delors Report (1996) which marked the shift of the policy discourse from one of lifelong education to that of lifelong learning. Consistent with this change, the theme of CONFINTEA V was 'Adult learning:

a key to the twenty-first century'. Aside from the shifting of emphasis from 'education' to 'learning', the Delors Report built on the Faure Report by elaborating on the four pillars of learning: learning to be, learning to do, learning to know, and learning to live together.

The first pillar, learning to be, was the main thesis of the Faure Report. Delors pointed out that in the 21st century, the three other pillars need to be addressed as well. Indeed, these are key issues in the area of ALE. In terms of the espousal of the lifelong learning perspective, a few have observed that in fact, there is a discourse divide: countries in the North have adopted a lifelong learning policy orientation while those in the South are limiting themselves to the EFA discourse, which addresses only basic education. For instance, in 2000, the European Union (EU) adopted the Lisbon Strategy, where lifelong learning was considered an important measure in ensuring that the region became the most competitive knowledge region in the world. Member-states of the EU regularly submit information on the progress of their lifelong learning plans. Outside the EU, there are very few countries (e.g. South Korea, Thailand and Namibia) where lifelong learning lies at the centre of educational policy. Meanwhile one implication of the dominant influence of the EFA discourse is that in the reporting of the countries on the status of ALE, a few have actually limited their reports to the progress of adult literacy. While literacy is a key component of ALE, and is one of the concerns of EFA, it also a foundational skill which people need to be equipped with if they are to continue learning. Indeed, in our increasingly written and virtual world, the power of oral cultures is being eroded as written materials are disseminated not only faster but also to a much wider audience. So to participate meaningfully in many economic, social and political activities, people need the basic skills of reading, writing and counting.

The contentious issue of gender differences in learning also needs to be examined. Advances in research allow cognitive scientists to study human brains and determine patterns of different dimensions of learning like memory and language acquisition. While the evidence of gender differences in learning is not as conclusive and discussions on biological determinism remain controversial, the observation that women and men have differential access to adult learning and education opportunities is now more valid than ever. Mediated by class, race, ethnicity and age, gender is a key variable in explaining differences in not only the quality of opportunities but also in learning outcomes. More women than men are marginalised when it comes to having access to literacy, for example. As such gender disparity is addressed, some educators are now pointing out that men are shying away from literacy classes and it is now often mostly women in the classes. Relevant questions in this regard are: 'How do women use their newly acquired skills?' and 'Do men use their skills differently?' Clearly, the closing of the lifelong learning and EFA discourse divide, the addressing of the basic skills of literacy, and

integration of a gender-just perspective are related issues that CONFINTEA VI needs to give attention to if it wants to pursue a vision of adult learning and education that is genuinely inclusive.

The intersectoral nature of ALE is not only an issue for the collection of data on the field of education. Adult learning opportunities in the health, agriculture, employment, and even defence, sector proliferate, but are not officially recognised as such. Usually labelled as training or extension activities, such unrecognised opportunities, are not, therefore, valued as contributing to development. The noticeable absence of the role of adult learning and education in the MDGs discussion (except in the goal of empowerment of women, where literacy is mentioned) could be taken as an indication that the contribution of ALE is not clearly understood and therefore needs to be highlighted. In as much as the theme is on sustainable development ('Living and learning for a viable future: The power of adult learning') CONFINTEA VI will need to clearly articulate how ALE is making an invaluable contribution not only to the achievement of EFA goals but also to the MDGs, and the meeting in Brazil should be used to present evidence in this regard.

The concern for evidence is not new. Centuries ago, during the Enlightenment, natural and physical scientists promoted the importance of empirical evidence in arriving at objective decisions. Such claims have been questioned by social scientists, who argue that individuals are selective and therefore subjective when considering evidence before them. Today, while there are increasing efforts to integrate the issues of objectivity and subjective judgement, there remains the hegemony of the 'counting and measurement' discourse, where it is assumed that unless a phenomenon can be reduced to numbers, it is not worth noticing, or investigating seriously. What constitutes evidence therefore becomes problematic. For example, how does one prove that adult literacy classes are empowering women? The evidence for such a claim will not be easy to produce, as literacy involves a long-term learning process that is taking place in a specific context and it would be a challenge to isolate attendance in literacy classes as the main cause for the empowerment of a woman. The discussion on evidence-based policy-making and benchmarking has, none the less, gained ground since 1997. At the UIL, the initial steps for developing benchmarks on ALE have not progressed as we were confronted by the stark reality of the wide range of contexts (not only social, economic, political, educational but also wide gaps in the appreciation of data and the capacity for gathering data). The answer to the simple question of what comparable data on adult education different countries actually have has eluded us. It has become clear that CONFINTEA VI will need to rely on the evidence of numbers, and stories and comparisons across countries and cultures will need to be creatively addressed in a consequent manner.

Participation in CONFINTEA VI remains a critical issue. As a category II conference, the Brazil meeting is basically a conference for governments to come together and agree on certain measures. Unlike some UN agreements (e.g. the Kyoto Protocol or the UN Conventions) where the measures are legally binding and governments who do not comply could be either fined or asked to explain their non-compliance, the outcomes of CONFINTEA VI are of a different nature. They could be in the form of either recommendations or declarations which governments will commit themselves to but are not obliged to enforce. As key stakeholders in the field of adult learning and education, the critical role of civil society in working with their respective governments, at the same time, making governments accountable to global promises needs to be highlighted. Their presence signals the commitment of UNESCO to bring about a genuine partnership between governments and civil society. The first CONFINTEA held in Helsingor was dominated by (mostly male) representatives of European government. CONFINTEA V saw not only the broader coverage in terms of country representation but also of the presence of civil society. More important, women were not only present in large numbers but were highly visible – the President of the Conference and the Rapporteur General were women. CONFINTEA VI clearly has to build on the gains of CONFINTEA V. Calls for involvement of the private sector are easily matched by the voices of the learners who want to be meaningfully involved. Concerns on the absence of grassroots communities in such meetings have also been raised. The interest and the commitment of the different stakeholders to CONFINTEA VI augurs well for ALE. Harnessing the collective and creative energies of all these stakeholders towards a shared vision of inclusive and democratising adult learning and education is a necessary step to transform adult learning and education in our world today.

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Lucia Quintero and Alan Tuckett

DIFFERENT BATTLEGROUND, NEW ADVOCACY TACTICS: A DECADE OF ADULT LEARNING IN ENGLAND

Abstract

In anticipation of CONFINTEA VI, this article critically reflects on the last decade of English adult education policy. The United Kingdom played an important role in 1997's Hamburg conference by putting forward International Adult Learners' Week, and inspiring delegates by its enthusiasm for adult education. However the trajectory of the past ten years has seen excessive amounts of initiatives come and go, a fall of adult learning participation and a more restricted view of adult education. Some of the policies discussed are: Individual Learning Accounts, the Union Learning Fund, Train to Gain, the Learning and Skills Council and the Adult and Community Learning Fund. By combining first-hand commentary with a chronological analysis of policy initiatives this article sets the scene for the new advocacy battles facing England.

PUNTO DE DEBATE DIFERENTE, NUEVAS TÁCTICAS DE ADVOCACY: UNA DÉCADA DE APRENDIZAJE DE PERSONAS ADULTAS EN INGLATERRA

Resumen

Anticipándose a la CONFINTEA VI, este artículo refleja de forma crítica las últimas décadas de la política inglesa de educación de personas adultas. El Reino Unido jugó un importante papel en la conferencia de Hamburgo de 1997 al proponer la Semana Internacional del Aprendizaje de las Personas Adultas y al animar a los delegados mediante su entusiasmo por la educación de personas adultas. Sin embargo, durante los diez últimos años se ha visto ir y venir una cantidad excesiva de iniciativas, una caída de la participación del aprendizaje y una visión más limitada de la educación de personas adultas. Algunas de las políticas debatidas son: Cuentas de Aprendizaje Individual, el Fondo de Aprendizaje Sindical, Formar para Ganar, el Consejo de Aprendizaje y Aptitudes y el Fondo de Aprendizaje de Personas Adultas y Comunitario. Al combinar comentarios de primera mano con un análisis cronológico de iniciativas políticas, este artículo plantea el escenario para las nuevas batallas de advocacy que enfrenta Inglaterra.

LES MUTATIONS DANS L'ÉDUCATION DES ADULTES CES DIX DERNIÈRES ANNÉES EN ANGLETERRE

Résumé

Allant au devant de la CONFINTEA VI, cet article pose un œil critique sur la politique menée cette dernière décennie en Angleterre au sujet de l'éducation des adultes. Le Royaume-Uni a joué un rôle important en 1997 à la conférence Hambourg en présentant la Semaine internationale des apprenants adultes et en inspirant les délégués par son enthousiasme à l'égard de l'éducation des adultes. Toutefois, ces dix dernières années ont été marquées par l'apparition et la disparition d'un nombre excessivement élevé de projets, par une baisse de la participation des adultes au circuit éducatif et par une conception de l'éducation des adultes devenue plus étroite. Les politiques passées ici en revue sont, entre autres, les suivantes : les Individual Learning Accounts (comptes individuels de formation), l'Union Learning Fund (fonds syndical pour la formation), le programme Train to Gain (former pour gagner), le Learning and Skills Council (conseil pour l'apprentissage et les compétences) et l'Adult and Community Learning Fund (fonds pour l'éducation des adultes et les projets éducatifs de proximité). Associant des commentaires de première main avec une analyse chronologique des initiatives politiques, cet article plante le décor des nouvelles luttes qui devront être livrées en Angleterre pour promouvoir et défendre les intérêts de l'éducation des adultes.

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As the sixth CONFINTEA conference approaches, many adult educators will be reflecting on the extent of the progress achieved. To contribute to this meditative frame of mind this article illustrates the UK's journey in adult education since CONFINTEA V: from its initial burst of enthusiasm and desire for change, to its more practical and current struggles.

With a decade's hindsight there is no doubt that CONFINTEA V set an ambitious and challenging agenda for the national governments that signed up to it. In the UK, it came at a propitious time for the new Labour Government, which was elected on May Day 1997. In a clear break from the policies of the Conservative years, the Government rejoined UNESCO in June 1997, just ahead of the Hamburg conference. Already, the Secretary of State for Education and Employment, David Blunkett had signalled his enthusiasm for the education of adults by making his first speech on taking office at the launch of Adult Learners' Week, and by announcing there the creation of a *National Advisory Group for Continuing Education and Lifelong Learning* chaired by Bob Fryer. Without delay, he requested this group, known as the Fryer Committee, to prepare a report on policy options for a lifelong learning government agenda.

To CONFINTEA, he sent the junior Minister for Lifelong Learning, Kim Howells, who proposed in his address that UNESCO should adopt an International Adult Learners' Week. After a great deal of work at the event, notably by delegates from South Africa, Jamaica, Slovenia, and in particular from Talvi Marja of Estonia, who was on the declaration's drafting committee, and Paul Belanger of UIL, the measure was adopted at the conference and, subsequently, by the UNESCO General Assembly. As a result, an emblematic trait of the British government's support for the CONFINTEA agenda has been the active endorsement and encouragement of learning festivals that, by celebrating existing adult learners, encourage others to join in.

One contextual issue that must be noted before further describing British adult education policies is that the political landscape of the United Kingdom is marked by the Labour Government's decision to pursue devolution of power to Scotland, Wales, and since the cessation of armed struggle in Northern Ireland to that province, too. Education is one of the main devolved powers, and there have been significant differences in the approaches adopted by the four administrations. For constraints of time and space this article focuses primarily on English adult education policies.

In England the report produced by the Fryer committee led to a government Green Paper,ⁱ *The Learning Age: A renaissance for a new Britain* (DfEE 1998). The document is most notable for its inspiring preface about the importance of adult learning for an enlightened democracy. In it, David Blunkett argued for a wide range of measures to stimulate participation, particularly for groups that

had previously benefited least from education, and envisioned a good deal of continuity in policies designed to stimulate learning for economic competitiveness. He stated:

As well as securing our economic future, learning has a wider contribution. It helps make ours a civilised society, develops the spiritual side of our lives and promotes active citizenship. Learning enables people to play a full part in their community. It strengthens the family, the neighbourhood and consequently the nation. It helps us fulfil our potential and opens doors to a love of music, art and literature. That is why we value learning for its own sake as well as for the equality of opportunity it brings (DfEE 1998, 2).

Blunkett's views were consistent with the inclusive lifewide as well as lifelong perspective that infused the Hamburg event. The main measures outlined in *The Learning Age* touched on a number of the key recommendations of the CONFINTEA report. Chief among them were to:

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- ***expand further and higher education*** to provide for an extra 500,000 people by 2020;
 - ***make it easier for firms and individuals to learn by creating the University for Industry*** and launch it in late 1999;
 - ***set up individual learning accounts*** to encourage people to save to learn, and begin by allocating £150 million to support investment in learning accounts by one million people;
 - ***invest in young people*** so that more continue to study beyond age 16;
 - ***double help for basic literacy and numeracy*** skills amongst adults to involve over 500,000 adults a year by 2002;
 - ***widen participation in and access to learning*** both in further, higher, adult and community education (including residential provision), and through the University for Industry;
 - ***raise standards across teaching and learning*** after the age of 16 through our new Training Standards Council by ensuring implementation of the Dearing committee's standards proposals, and by inspection in further and adult education;
 - ***set and publish clear targets*** for the skills and qualifications we want to achieve as a nation;
 - ***work with business, employees and their trade unions*** to support and develop skills in the workplace;
 - ***build a qualification system which is easily understood***, gives equal value to both academic and vocational learning, meets employers' and individuals' needs and promotes the highest standards.
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DfEE 1998, 15)

The aspiration of *The Learning Age*, to create a society where people could enter and re-enter education at any stage of their lives, received wide public support with over 3,000 responses submitted, a great majority of which were positive.

However not all of the document's initiatives survived intact. For example, *individual learning accounts* offered, for the first million adults to sign up, £150 of government money to match just £25 of individual investment. It generated great enthusiasm and demand, but like a number of other measures it had been introduced in a hurry, and without good enough safeguards against fraud. A small number of fraudulent agencies established operations to gain individuals' money without offering services. Once this became clear, the initiative in England was halted, though it continued in Wales, and for workers in the health service. Nonetheless it showed that individual demand could be stimulated, and that especially where there were trusted peer group intermediaries, like trade union colleagues or learning champions in communities, it was possible to engage communities previously sceptical about the value of learning to their lives.

Another initiative was the *University for Industry* (Ufi), which was designed as a parallel institution to the enormously successful *Open University*. It was planned to provide online learning to people at work or seeking to study at levels below university. The Ufi has survived, though it has gone through several different remits in the years since its inception. A third success stemming from the Green Paper has been the work begun with the *Union Learning Fund*, to promote trade unions' support in the creation of a learning society. In the decade since the work started more than 20,000 trade unionists have become union learning representatives, encouraging colleagues back into learning. Furthermore the academy for trade union learning, *UnionLearn*, has helped to re-define modern trade unionism, and to ensure that not all the initiatives of a business-friendly government are focused solely on employer interests.

One key recommendation of Hamburg's *Agenda for the Future* was that governments should ensure the universal right to literacy and basic education. The *International Adult Literacy Survey* had highlighted the fact that seven million adults in England lacked functional skills in reading and writing and that one in five adults had very low numeracy abilities. The Government responded to this challenge with the launch of the document, *Skills for Life: The national strategy for improving adult literacy and numeracy skills* in 2001. The strategy aimed to improve the literacy and numeracy skills of 750,000 adults by 2004 by means of a promotional campaign and an entitlement to free training in basic skills. It also predetermined which priority groups had to be targeted in order to achieve the maximum impact. These were: unemployed and benefit claimants, prisoners, public sector employees and low-skilled workers in employment. It built on earlier commitments to create a national basic skills

curriculum based on new standards, design new teaching qualifications, and extend the reach of the strategy to take account of the needs of adults with learning difficulties. Significantly for the period that followed, provision for people for whom English was a second or additional language was also included.

The CONFINTEA commitment to fostering learning for democracy was also pursued through a number of routes. The National Institute of Adult Continuing Education (NIACE) and the Basic Skills Agency (BSA) jointly managed an Adult and Community Learning Fund on behalf of the Government. Its purpose was to support local initiatives designed to engage and empower marginalised groups, and to spread the experience of active democratic action through learning. Another way learning for democracy was pursued was through the *Neighbourhood Renewal Strategy*, which sought to work with the poorest communities in England to build social capital and routes towards employment, especially for communities with strong concentrations of worklessness.

At the same time the Government's active labour market policies sought to improve the routes into work for unemployed people. However, different departmental policies inhibited the development of strategies that effectively secured sustainable and skilled work – the focus of job centres was to put work first, while the focus of the education departments was to secure qualifications for learners. Getting the two departments to harmonise their services to the same people has taken the full decade. However, some inter-departmental cooperation has begun to be successful. The heart of the new approach is to identify the barriers to sustainable employment and progression, and to organise both welfare and skills systems around tackling them. The Government is now committed to ensuring that all customers, regardless of the benefit they receive are able to attend part-time or full-time training if their personal adviser believes it is necessary to secure sustainable employment. This has led to the development of Skills Health Checks for claimants and the removal of the '16-hour rule' for specific benefit groups.ⁱⁱ

The four years of David Blunkett's leadership of the Department for Education and Employment saw a major rise in investment for adult learning, and something of a spirit of adventure. It also saw a blizzard of initiatives. The largest of these was the creation of a new government agency responsible for planning and funding further education. The remit given to the new body, the Learning and Skills Council (LSC), re-asserted the vision for adult learning from *The Learning Age*. However, new bodies take on a life of their own, and the LSC began firmly committed to prioritise the task of meeting the skill needs of the British economy. The shift from learning to skills, reveals the increasing centralisation of departmental priorities by the Prime Minister's office. More direct control resulted from the establishment in 2001 of the Prime Minister's Delivery Unit, which is meant to monitor key priorities around education,

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health, crime and transport. The Unit focused departments' attention on headline Public Service Agreement (PSA) targets, agreed between the Treasury and departments.

For adult learning these PSAs were a *Skills for Life* target, new goals for Level 3 (university entrance and skilled technician level) qualifications, and for higher education a determination to secure progress towards a 50% participation target by the age of 30. This had the perhaps unintended consequence of creating a new social disease of being 31 or over. Over time, the effect of the targets has been to displace focus from the complexity of the learning for which they are proxies onto the achievement of the narrow set of pre-established outcomes: box ticking, at worst. They have certainly had a negative effect on the breadth of adult learning opportunities.

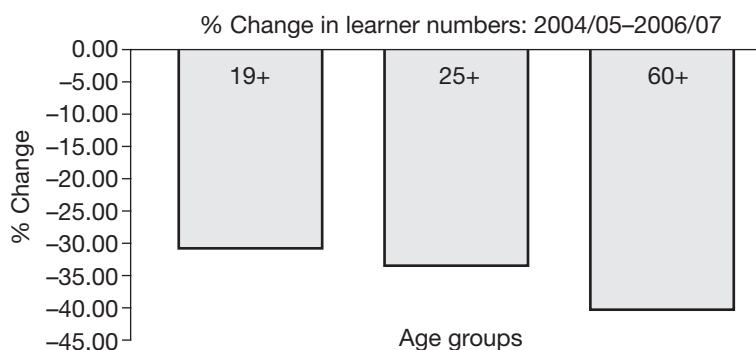
David Blunkett's successor as Secretary of State brought Estelle Morris, an education professional, to the leadership of the department, and whilst her priorities were overwhelmingly focused on school-aged education, she did bring a fresh dynamic to improving curriculum and the quality of learner experience to post-school education. However, her period in office was short, and the publication of the first skills strategy in 2003, *21st Century Skills: Realising our potential*, marked a sea shift in Government priorities for lifelong learning. The first period, with David Blunkett, had seen twin priorities for lifelong learning: economic modernisation, certainly, but also widening participation in pursuit of a fair and inclusive society. From 2003 onward the policy was to pursue equality and fairness through economic modernisation. 'Work,' the argument went, 'is the most effective route out of poverty'.

The main aim of the White Paper, *21st Century Skills: Realising our potential* (DfEE 2003) was to strengthen the UK's position as one of the world's leading economies. Adult learning was given a major role to play, for this would be achieved by ensuring individuals had the necessary skills to make themselves employable and that employers had the right skills to support their business. The document strongly focused on the right skills for economic productivity. It also announced the creation of 23 Sector Skills Councils (SSCs) to represent a new voice for employers and employees. SSCs are independent employer-led organisations that identify solutions to the skills needs of different economic sectors. For individual learners the document announced a new guarantee of free tuition to achieve a Level 2 (ISCED 3c, >2yrs upper secondary education) qualification and the recognition of ICT proficiency as a third basic skill in the *Skills for Life* programme. To develop a more responsive adult education system the White Paper proposed to reform the qualifications framework through strengthening Modern Apprenticeships, which offer labour market entrants work-based qualifications and (not for the first time!) introducing credit frameworks for adults.

To be fair, and largely because of the intervention of successive junior ministers, the skills strategy White Papers did recognise that adult learning serves purposes other than the narrowly economic ones. As the first paper, *21st Century Skills*, has it:

Economic and social objectives are necessarily intertwined. But skills serve wider purposes. For many people learning enriches their lives. They may enjoy learning for its own sake. Or it may make them better placed to give something back to their community, to help family or friends, to manage the family finances better, or help their children achieve more throughout their school careers (DfEE 2003, 60).

Whilst a modest budget was safeguarded for adult learning for personal and community development, large swathes of publicly funded work for adults in colleges of further education were cut as the Government focused on the development of work-based learning on employers' premises. The result of this has been a startling decline in the number of adults engaged in publicly funded provision, with 1.4 million adults lost in just two years, with a heavy weighting towards the loss of older learners:



Additionally within this fall of 1.4 million adult learning places, there has been a fall of 184,600 adult learners in programmes for personal fulfilment, civic participation and community development funded by the aforementioned adult learning safeguard. Apart from the lack of inflationary increases these changes are not the result of Government cuts. Although the loss of learners could be the result of providers concentrating on more expensive work for disabled and more disadvantaged learners such a dramatic decline points out the need to find the right balance between targeted provision and more general adult education.

Nevertheless some of the focus on labour market developments has been exciting – not least in the Army's successful literacy programmes, or the work

of the national Health Service University in focusing on the needs of the least qualified half of the NHS workforce. There are also inspiring employer engagement examples – in the transport sector alone the work of MerseyTravel allowed all its workers to access learning on a 24-hour basis through learning centres, and the British Aerospace created its own virtual corporate university. However, the one-third of British employers unwilling or unable to release staff for learning remained stubbornly untouched by these first initiatives.

A second skills strategy paper was published in 2005. *Skills: Getting on in business, getting on at work* (DfES 2005) built on the 2003 White Paper and sought to put employers' needs at the centre stage of the design and delivery of training. It announced the implementation of a National Employer Training Programme as the strategy to give employers rather than providers the power to determine how public funds were best to be spent to meet business priorities. In return for free and flexibly-funded training, employers were expected to allow employees enough time at work to undertake their studies. For individual learners a new entitlement for any low-skilled adult to get free training to achieve a first full Level 2 qualification is announced and the *Skills for Life* programme is given the new target of 2.25 million adults achieving recognised literacy and numeracy skills by 2010.

Not satisfied with these initiatives the Government announced a Treasury review of the skills needs of the UK economy for the year 2020, to be led by Lord Leitch. The Leitch Report, *Prosperity for all in the global economy: World Class Skills*, provided an account of the UK's current skills landscape as well as an estimate of the optimal skills mix necessary to maximise economic growth and social justice. It recommended the following skills targets for 2020, to ensure that the UK was in the top quartile of OECD countries by each of the indicators used in international comparison. Although it argued that central planning could not be successful in predicting skills needs, it went on to announce new skills targets for the country:

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- 95 per cent of adults to achieve the basic skills of functional literacy and numeracy, an increase from levels of 85 per cent literacy and 79 per cent numeracy in 2005;
 - exceeding 90 per cent of adults qualified to at least Level 2, an increase from 69 per cent in 2005. A commitment to go further and achieve 95 per cent as soon as possible;
 - shifting the balance of intermediate skills from Level 2 to Level 3. Improving the esteem, quantity and quality of intermediate skills. This means 1.9 million additional Level 3 attainments over the period and boosting the number of apprentices to 500,000 a year;
 - exceeding 40 per cent of adults qualified to Level 4 and above, up from 29 per cent in 2005, with a commitment to continue progression.
-

The review foresaw that responsibility for achieving targets would be shared between government, employers and individuals. The three stakeholders would need to increase action and investment and focus their efforts on economically valuable skills. Leitch recommended that the way forward was to build on existing structures while at the same time modifying the system to make it more demand-led and responsive to future market needs.

The net effect of these changes has been the massive expansion of a programme to support workplace learning with public funds. The Train to Gain programme has been slow to secure the levels of participation and achievement that the Government would like to see, although it is gradually building a head of steam. However, the resources to fund this programme have come directly from open courses that learners freely choose on their own terms. Future plans make clear that by 2015 the only public funding for adult learning, apart from the modest safeguarded budget NIACE helped to negotiate in 2003, will be employer-based Train to Gain, or a newly re-introduced learning account, *Skills for Jobs*, where funding will be available as long as you learn what the government wants you to learn.

Language courses have been major casualties of these changes. So have community-based initiatives to engage disadvantaged communities. Provision for retired people has dropped by more than half. Of course, state funding is not the only source of opportunity for learning. Reading groups are booming; there is a thriving industry in study-based tourism for those who can afford it. Britain's museums and galleries offer a wide range of activities for learners, and whilst explicit provision for adults' cultural development is cut back, schools are extending their brief to serve the communities in which their pupils live. The Government is currently trying to map the range of this activity, through a consultation paper, *Informal Adult Learning – Shaping the way ahead*, so that it can better target what money it has for community learning.

Internationally, much of UK government aid has been focused on universal primary education at the expense of those millennium development goals that directly benefit adult learning, though there are now signs that this focus is shifting.

Overall, warm aspirations of the early years of a Labour Government have given way to a more narrow utilitarianism – which is of course of benefit to those people whose needs are met by Government programmes. However, the spirit of CONFINTEA V, so warmly embraced by the Government's early programmes, now seems a lifetime away. This of course leads to a new challenge for non-government agencies and adult educators: to advocate for adult and lifelong learning in the context of changing priorities for public funding. We are confident CONFINTEA VI will give us new tools, strategies and momentum for the next decade.

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Notes

- ¹ A Green Paper is a consultative document issued by the government and containing policy proposals for public discussion.
- ² The 16-hour rule forbids those claiming housing benefit and those claiming job seeker's allowance who have passed their nineteenth birthday to study for more than 16 hours of guided learning per week. This applies to all levels of learning from basic ESOL courses to degree level study. In addition, Jobcentre Plus may require claimants to abandon courses of study in order to take up employment.

Susanne Lattke

**TOWARDS THE 6TH UNESCO
INTERNATIONAL CONFERENCE:
THE NATIONAL CONFINTEA PROCESS
IN THE
FEDERAL REPUBLIC OF GERMANY**

Abstract

The final documents adopted at CONFINTEA V in 1997 set out a variety of issues and challenges for the future development of adult education worldwide. The forthcoming CONFINTEA VI conference, due in 2009, will mark another milestone and provide an opportunity for the stocktaking of success stories and unresolved challenges, and for the development of action strategies. This paper examines the German CONFINTEA V follow-up, identifying both major achievements and continuing problems and needs. The paper is based on research that includes a survey of experts carried out for the German national report for CONFINTEA VI, in which the author is involved.

**HACIA LA 6ª CONFERENCIA INTERNACIONAL DE LA
UNESCO – EL PROCESO NACIONAL DE LA CONFINTEA EN
LA REPÚBLICA FEDERAL DE ALEMANIA**

Resumen

Los documentos finales adoptados en la CONFINTEA V en 1997 presentaron una variedad de temas y desafíos para el futuro desarrollo de la educación de personas

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adultas a nivel mundial. La próxima conferencia de la CONFINTEA VI, que tendrá lugar en 2009, marcará un nuevo hito y brindará una oportunidad para realizar un balance de la situación de casos exitosos y desafíos aún no resueltos, y para el desarrollo de estrategias de acción. Este trabajo analiza el seguimiento alemán de la CONFINTEA V, identificando tanto los logros importantes como los problemas y necesidades que aún persisten. Se basa en investigaciones que incluyen una encuesta a expertos para el informe nacional alemán para la CONFINTEA VI, en el que la autora está involucrada.

PRÉLIMINAIRES DE LA CONFINTEA VI EN ALLEMAGNE

Résumé

Les documents finaux adoptés en 1997 à la CONFINTEA V présentaient tout un ensemble de problèmes et défis pour l'évolution future de l'éducation des adultes dans le monde. La CONFINTEA VI, qui doit se dérouler en 2009, marquera un nouveau tournant et sera l'occasion de faire le point non seulement sur les réussites, mais aussi sur les défis qui n'ont pas pu être relevés avec succès, et d'élaborer de nouvelles stratégies d'action. Cet article se penche sur ce qui a suivi la CONFINTEA V en Allemagne, présentant un relevé des principales réalisations ainsi que des problèmes et nécessités qui persistent. Pour le rédiger, l'auteure s'est basée sur des recherches auxquelles elle participe, entre autres sur une enquête réalisée par des spécialistes pour le rapport national allemand qui sera soumis à la CONFINTEA VI.

The last UNESCO International Conference was held in Hamburg, Germany, in 1997. It concluded with the adoption of the documents *The Hamburg Declaration on Adult Learning* and *The Agenda for the Future* (UNESCO 1997), which may be regarded as pointers to the further development of adult education¹ (see the paper by J.H. Knoll in this volume). A good year before the next conference in the series, CONFINTEA VI, it is a good time to reflect on what has been achieved since the Hamburg conference and on the main challenges that (still) remain. Ultimately, educational programmes only become effective if they are driven and backed by consistent monitoring. That monitoring is important in at least two respects. In general psychological terms, it provides a regular reminder of the goals that have been agreed, thus preventing their disappearing all too easily from the general consciousness. At a more concrete level, monitoring helps to pin down more precisely the practical and political actions that are required, by identifying the factors in success and failure and uncovering urgent needs for action.

Under the impetus of relevant international activities – in the context, for example, of the OECD, the European Union and UNESCO (Schemmann 2007) – monitoring is becoming increasingly important at national level as well, in the form of regular, data-based educational reporting. Under the reform of regional

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responsibilities that came into effect in August 2006, the German Federal Government and the Länder have a new shared responsibility for establishing the performance of the education system for the purposes of international comparison (although the previous shared responsibility for educational planning has come to an end). In the same year, the Educational Reporting Consortium issued its first national indicator-based report on the situation of education in the Federal Republic of Germany, commissioned from it jointly by the Federal Government and the Länder (Konsortium Bildungsberichterstattung 2006; see below Section 2). There is rare agreement between the political parties on the prime importance of educational research and reporting, as is evident from the similar motions tabled simultaneously by three parliamentary parties in May 2007 (Deutscher Bundestag 2007a, 2007b, 2007c).

National reports on the state of adult education are also being drawn up as part of the CONFINTEA process. The current preparations for CONFINTEA VI, in the context of which such a report is now being drafted, provide an occasion to look back on the decade that has passed since CONFINTEA V and to determine what needs to be done now, and what is to be expected of the UNESCO conference. That is what this paper aims to do, largely on the basis of the initial findings of the research and investigations being carried out for the national report now being prepared. First, by way of introduction, there will be a brief outline of the development of national reporting that has taken place in Germany since 1997 in response to CONFINTEA.

1. National CONFINTEA reporting in Germany

An initial survey of the national CONFINTEA V follow-up was carried out in 1999 by the German Institute for Adult Education on behalf of the Federal Ministry of Education and Research. Activities and initiatives of relevance to the goals set out in the Hamburg documents were identified by means of a written questionnaire sent to the pertinent Ministries and associations. The results were compiled into a report and published (German Institute for Adult Education 1999). It could not be argued so soon after CONFINTEA V that these activities had been occasioned by the conference, the aim being instead to reveal, more or less as an act of self-reassurance, the national developments that happened to coincide with the direction agreed in the UNESCO framework. It was in the nature of this self-reassurance that the survey largely aimed at recording successful developments rather than what was lacking or was yet to be done.

In 2003, a mid-term review was carried out by UNESCO, half-way between CONFINTEA V and CONFINTEA VI. Each country was asked to prepare an interim report. The German UNESCO Commission acted as secretariat for the drafting of the German report, which was drawn up in accordance with the

headings laid down by UNESCO and was published on the internet pages of UNESCO (German Commission for UNESCO 2003).²The report contains information on the following areas:

- Structures and institutional frameworks;
- Legal provisions and delivery system;
- Participation in adult learning;
- Research in adult learning;
- Staffing of adult learning;
- Empowerment of adult learners;
- Best practice and innovations;
- Future actions and concrete targets.

A modified, though not fundamentally different, list of contents has been drawn up for the new national report now being prepared for CONFINTEA VI. Among the changes is greater emphasis on funding and evaluation and the addition of a separate chapter on the subject of literacy – a core theme of UNESCO educational activities – but these are offset by the dropping of empowerment as a separate topic. The exact chapter headings are:

- Policies, legislation and funding;
- Quality of adult education: provision, participation, learning outcomes;
- Research, innovation, best practice;
- Adult literacy;
- Expectations of CONFINTEA VI and future prospects for adult education.

In both cases, the structure makes it plain that national reports (should) put the emphasis on structural aspects of adult education, while those aspects of the ‘Hamburg Agenda for the Future’ which were defined in more thematic terms – such as adult learning and democracy, adult learning and the changing world of work, and adult learning in relation to environment, health and population – are given less prominence, at least in terms of formal reporting.

In Germany, the German Institute for Adult Education was again charged with drawing up the national report to be presented at CONFINTEA VI. To that end, it distributed a written questionnaire to key players in German adult education, besides collating data and carrying out literature research. The survey – complemented by oral interviews – was sent to a total of 17 associations and research institutes in the field of continuing education,³ the main aim being to establish a picture of opinion on needs for educational action and priorities to be set in future, and views on prominent recent initiatives and research in the field of adult education. On the basis of the responses, some light will be shed below on recent developments and on the main challenges currently felt to be facing adult education in Germany.

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2. A Review of German adult education since CONFINTEA V

Since the UNESCO conference in Hamburg in 1997, there have been far-reaching strategic and policy developments in German continuing education. These have contributed to a shift in perspective and have ushered in significant changes. International influences have played an important part in this process: this applies not only to initiatives deriving from UNESCO and CONFINTEA, but in at least equal measure also to developments in EU education policy that have occurred in parallel. The establishment of lifelong learning as an educational paradigm has been given significant encouragement in Germany, for example, by processes initiated at the Lisbon Summit in 2000 (European Council 2000) and subsequently extended to all Member States through the open coordination method (Bechtel *et al.* 2005). The European Commission Memorandum on Lifelong Learning, with its six key messages, was warmly welcomed and discussed in Germany, for example, and has since become, like its follow-up documents, an explicit or implicit point of reference for major educational strategies and measures in Germany.

In retrospect, what are the core developments, milestones and markers found in German continuing education over the last ten years? Let us look at the three areas of the development of education strategy, educational research and reporting, and programmes and initiatives.

Development of Education Strategy

Two years after CONFINTEA V, the Federal Government and the Laender set up an Education Forum, consisting of representatives of Ministries of Education, the social partners, the Churches, students and apprentices, and academics, which put forward a total of 12 recommendations for reform of the German education system by 2002 (Arbeitsstab Forum Bildung 2002). The Education Forum gave urgent priority to early support, individual support, implementation of lifelong learning for all, education for responsibility, and reform of initial and inservice teacher training.

The successful establishment of lifelong learning as the overall concept of education was most clearly demonstrated two years later in 2004 with the adoption by the Federal-Länder Commission for Educational Planning and Research (BLK) of a Strategy for Lifelong Learning in the Federal Republic of Germany (BLK 2004). The aim of the Strategy is to show how learning by everyone at all stages and in all areas of life, in varying locations and in many different forms, can be encouraged and supported. The Strategy sets out priorities for development – the incorporation of informal learning, self-directed learning, skills development, networking, modularisation, educational counselling, a new culture of learning/popularising learning, and equal opportunities for access – which need to be handled in different ways for the

five stages of life: for children, young people, young adults, adults, and older people. The Strategy thus records an impressive shift in policy perspective, towards the concept of a lifelong continuum of education that includes adult education as an equal component. Two aspects of the Strategy are particularly striking: first, the constant linking of stages of life with development priorities displays a deliberate attempt to counter the continuing separation between sectors of education. Secondly, the express inclusion of the older, post-employment age group is a clear rejection of too one-sided an emphasis on the functional aspect of continuing education tied to employment and the labour market.

Only a few weeks after adoption of the BLK Strategy for Lifelong Learning, the Committee of Experts on Funding Lifelong Learning published its final report (Expertenkommission 2004). This independent committee, set up by the Federal Government in 2001, put forward a number of models and an overall plan for the funding of lifelong learning, with the aim of increasing participation in continuing education. In its report, the Committee emphasises the importance of learning for personal, social and economic development in Germany. Lifelong learning is to be seen as investment in individuals, enterprises and society, aimed at making full use of the potential for learning and performance, enhancing productivity and economic growth, and meeting demographic challenges. The specific recommendations made by the Committee notably include the introduction of an Adult Education Promotion Act to support preventative education. The outcomes of the Committee were broadly welcomed and have been discussed at numerous conferences and specialist meetings, as well as in Parliament and by the parliamentary parties. However, the criticism has been made that the Federal Government has as yet only made a modest response to the report. The current model of the continuing education savings scheme, for example, is regarded by many agencies as inadequate in terms of equal opportunities, and as lagging behind the Committee recommendations. The final report by the Committee has nonetheless inspired a significant and continuing debate.

In 2005, the Coalition Agreement between the CDU, CSU and SPD again called for easier transfer and stronger integration between education sectors (Coalition Agreement 2005), albeit by resorting to the slogan of 'continuing education as a 4th pillar', which would appear metaphorically to tend in the opposite direction. Nonetheless, the Agreement does explicitly call for strengthening of the continuing education sector, which is to be systematised with the help of national guidelines. There is less reference in the priorities mentioned to the social and personal benefits of continuing education, with the exception of enhancing employability. In particular, the coalition partners agreed on:

- more transparency in educational counselling and greater quality assurance;
- special support for the socially disadvantaged, in order to increase their participation in continuing education;
- funding of continuing education by the general public, business and individuals;
- the development of educational savings schemes as a new funding tool;
- the creation of a framework for the establishment of education and training time accounts by the social partners.

Currently, much is expected from the Recommendations of the Continuing Education Innovation Committee (BMBF 2008a). This Committee, made up of experts from the academic world, business and practice, representatives of the social partners and the Conference of Ministers of Education of the Laender, was set up in May 2006 by the Federal Ministry of Education with the task of drawing up recommendations for the future of continuing education and work-related learning. The recommendations, which currently exist in draft form, are bound by the overarching goal of making long-term use of and further expanding Germany's most important resource, 'education', in order to create more equal opportunities, social participation and economic development, and to establish and further enhance Germany as a centre for research. They relate to such areas of action as funding, learning times, ease of transfer between sectors, and educational counselling. On the basis of the results of the work of the Innovation Committee, the Federal Government recently launched a training offensive under the title 'Advancement through Education' (Federal Government 2008), which will work to increase participation in continuing education to 50% by 2015, among other goals.

Educational research and reporting

Many efforts have been made in recent years to improve data provision and access in the area of continuing education research and reporting. In particular, the 2006 National Education Report (Konsortium Bildungsberichterstattung 2006), compiled by an independent committee of academic experts, provided for the first time a review of the entire education system in Germany that was data-based and backed by indicators, and this review will appear every two years, with a changing focus. The Report furnishes the Federal Government and the Länder with a means of continuously observing developments and changes in education. Overall, the improvement thus achieved in national reporting not only contributes to greater transparency and comparability, but also offers an important basis for analysis of shortcomings and consequent quality enhancement. Nevertheless, it cannot be ignored that the data available in the heterogeneous area of adult/continuing education reveals huge gaps, and that there is no consistent database covering the whole sector.

An important addition to national reporting, in which the section on continuing education is as yet somewhat superficial for that very reason, is the Continuing Education Trend Analysis (DIE, 2008), which the German Institute for Adult Education will present for the first time in 2008 and will be a unique kind of research document. It will draw together and evaluate all the available quantitative and qualitative empirical data on major issues relating to institutionalised continuing education in Germany, such as growth in provision, changes in facilities, the situation of continuing education staff, etc., in the aim of identifying and interpreting current lines of development in continuing education (Nuissl 2008). There are plans for further trend analyses to appear at two-year intervals, which will not only improve access to data and the benefits derived from it, but will also keep the spotlight focused on developments in continuing education and emphasise the importance of continuing education within the concept of lifelong learning.

The Continuing Education Reporting System, which has collected quantitative data on the continuing education behaviour of the population and on structures in the continuing education landscape since the 1970s, is currently being radically expanded. As a result of the ongoing harmonisation of the Continuing Education Reporting System with the European Adult Education Survey (AES) (TNS infratest 2008, 3), European comparability will be greatly improved in the near future. On the other hand, it is unavoidable that the change-over at national level will at least partly disrupt the forecasting of trends and the time sequencing in the Continuing Education Reporting System itself. It is to be hoped that this sacrifice will be offset by future European comparability, which should foster competitive benchmark-oriented thinking and improve the arguments for the need to further expand the continuing education system.

In many cases, the experts surveyed have observed an increase in empirical research studies of education in the last few years, after some years of relative inactivity in this field. It is not possible here to make even a short list of all relevant recent studies.⁴ By way of example, mention may be made, however, of the Study of Continuing Education and Social Background carried out by Barz and Tippelt, which is widely regarded as influencing the shape of continuing education practice. Through its research projects, this enquires into and describes distinct social environments, and the results of the research have been made of immediate use to continuing education practitioners through publication (Barz and Tippelt 2004a, 2004b; Tippelt *et al.* 2008).

Experts have remarked critically on the frequently observed small scale of continuing education research and the limited duration of research projects, which often restrict their effectiveness and coverage. There are complaints, for example, that in continuing education research there are hardly any research consortia involving a large number of researchers who have built up their

expertise over several years. Instead, the research landscape is typified by projects running for short periods of time and by high staff turnover, one of the significant results of which is that they attract little outside attention. There is therefore a need not only to expand research in quantitative terms but also to bundle together the topics investigated and to give them a longer life.

The focus placed by the Federal Ministry of Education and Research on support for 'Research and Development on Adult Literacy/Basic Education' at the end of 2006 has gone one step in this direction, by sponsoring a large number of composite projects to support basic education and literacy provision in Germany over the longer term. The aims of this focus are:

- To capture and present the basics and peculiarities of basic education and literacy work with adults, and the heterogeneity of the target groups, through development-oriented research and data collection;
- To improve the effectiveness of measures and counselling for those concerned, and to facilitate and increase their participation in provision;
- To analyse the basic skills required, and to promote basic education in the context of the economy and employment;
- To foster the professionalisation of basic education and literacy provision by developing in-service training modules.

Lastly, further encouragement for long-term continuing education research is to be expected from the new programme of Support for Empirical Educational Research established at the end of 2007 by the Federal Government (BMBF 2008b), the declared aim of which is to expand the research landscape through targeted and consistent structural support.

Initiatives and programmes

In addition to strategy papers and research projects, many programmes and initiatives have brought about changes in the continuing education field since 1997 by going beyond abstract analysis and recommendations, and developing and testing actual, feasible models for improving continuing education participation and provision in the context of equal opportunities. A few examples, which were thought particularly significant by the experts consulted, may be mentioned here.

The most prominent, the programme 'Learning Regions – Supporting Networks' (BMBF 2008c), which can be traced back partly to the ideas of CONFINTEA V, was one of the largest programmes in the field of continuing education. Under this scheme, the Federal Ministry of Education and Research, together with the Laender, supported networking in 2000–2007 between major players from the commercial, social and cultural environment, with the aim of increasing participation in education and training, and opening up new educational provision and services for lifelong learning. A wide range of

different agencies worked together in the networks, from local government and employment services, and many different kinds of educational establishments and providers, to companies, chambers of trade and industry, social partners and others.

The basic idea of promoting lifelong learning through local initiatives that extend beyond education, which is in tune with European initiatives, may indeed be regarded as showing the way in which continuing education may develop in future. The programme also unquestionably sparked off numerous initiatives and innovations and released considerable potential at local level and further afield. The question whether these high hopes were actually fulfilled, cannot be answered finally at the present time, however, since the programme evaluation is not yet concluded. The experiences reported by the institutions involved are distinctly contradictory. The criticism is increasingly made that the programme was poorly equipped, and there are also recurrent complaints that there were inadequate guarantees of the sustainability of initiatives and that projects were too fragmented and lacked cohesion. Correcting these shortcomings should be regarded as a priority in future.

A further major programme, this time concentrating on the broad field of vocational or work-related continuing education, is the research and development programme Culture of Learning Skills Development sponsored by the Federal Ministry of Education and Research and headed by the Work-Based Continuing Education Research Committee (ABWF 2007), which combined fundamental research with practical development in a large number of different support areas. Here too, the final programme evaluation is still incomplete, although the linking of research and practice, which was generally achieved, is already seen as a clear success of the programme.

The following projects focusing on particular aspects of continuing education may also be mentioned by way of example:

- Funding/promotion of participation in continuing education: since 2006, the North Rhine-Westphalia (NRW) Education Vouchers initiative has offered employees in enterprises with fewer than 250 staff a substantial incentive to take part in continuing education, in that the Land will cover half the course fee. This financial incentive is managed unbureaucratically, making it easier to take up. According to the NRW Ministry of Employment, over 100 000 vouchers had been issued by April 2007, far exceeding anyone's expectations of the project, which is the only example of its kind in the country.
- Integration: the initiative 'INNOVINT – Innovation through Integration', launched by the German Adult Education Association, promotes 'second-chance' educational opportunities for the target groups of school drop-outs, migrants and functional illiterates, and the

continuing education provision needed to meet their needs. This initiative has been discussed in a number of continuing education policy forums, and has helped to ensure that the task of removing educational disadvantage is being addressed, and that it is not only various élites that receive support.

- **Certification:** Germany still lies far behind other European countries in the certification of informal learning. The 'ProfilPass', introduced nationally in Germany in 2005 (BMBF 2005), is therefore a long overdue step in the identification and documentation of skills acquired informally throughout life. There is, however, still a need for considerable action to recognise skills acquired informally for the purposes of formal (continuing) education. Nonetheless, the ProfilPass initiative can already be seen as a step in the right direction, by focusing adult education on the personality of the learner and on individual learning histories.
- **Managing demographic change:** the future ageing society will require new kinds of involvement, taking advantage of the contribution that older people can make to society while also responding appropriately to their particular psychological and physical circumstances. The 'Experience for Initiatives' package, sponsored by the Federal Ministry for the Family, Senior Citizens, Women and Youth (BMFSFJ), may be mentioned by way of example. This aims at creating a dialogue between the generations and at expanding a culture of voluntarism that goes far beyond the voluntary commitment that is already well-established in Germany.

Despite the demonstrably positive impact of a wide range of programmes and initiatives, attention needs to be called to certain fundamental reservations. It is possible to point to a large number of innovative programmes receiving public funding, but this has been accompanied for some years by a continual decline in institutional funding for continuing education. In addition to the increased financial insecurity that this has produced for institutions, there is the danger that the prime motive for education providers taking part in schemes will be financial, and that the provision they actually need to make will not be adequately covered. This aspect should be taken into account in programme evaluations.

3. On the eve of CONFINTEA VI – Key challenges for the future development of continuing education

What are the main current challenges facing the key players in continuing education? From the responses of the experts surveyed, the following emerge as areas for priority action:

Increasing participation in continuing education and equal opportunities

Continuing education is becoming increasingly important in the context of lifelong learning, because it can open up and maintain opportunities for participation in occupational and social life, at a time of constant structural change. Increasing participation in continuing education overall, especially by population groups that are as yet underrepresented, is therefore a fundamental aim of education policy, and leads in turn to a large number of specific requirements.

Despite the importance of continuing education being continually stressed rhetorically, Germany occupies a place that is well down the middle of the international ranking (Jouhette and Romans 2006). According to the Continuing Education Reporting System, there has been a steady decline in participation rates since 1997 – the year of CONFINTEA V – from 48% to 41% in 2003 (BMBF 2006, 19). This trend was reversed slightly for the first time in 2007. The rise to 43% in that year recorded in the most recent Continuing Education Report, combined with other indices (TNS infratest 2008; see also Nuissl 2008, chapter on participation), is cause for some cautious optimism, even though the declared target of the Federal Government – increasing participation in continuing education to 50% by 2015 – is still a long way off. The (modest) rises in participation rates among the non-employed population and the (clear) rise in rates among foreigners and Germans with a migrant background are a pleasing trend.⁵ At the same time, it is apparent from the figures that participation in continuing education is still very unevenly distributed. It depends on the level of education previously achieved and on social, family and occupational status. Those who are already well-educated are more likely to take part in continuing education. According to the survey, only 29% of people with a lower secondary school-leaving qualification took part in continuing education in the preceding 12 months, compared with 60% of those with an upper secondary leaving certificate. There is still a considerable need for action in this area, so that continuing education reaches those people who need it most and the educational divide does not become yet wider.

Encouraging motivation and investment in continuing education

Measures to increase participation in continuing education are needed on both the supply and the demand side. On the demand side, there is a particular need to raise awareness of the importance of lifelong learning among the public. Continuing education campaigns launched with State support can be an important way of increasing interest in continuing education and motivation. The nationwide Festivals of Learning introduced in the wake of CONFINTEA V are seen as a successful idea, the potential of which was not sufficiently exploited, particularly as they were later abandoned.

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At the same time, a balanced apportionment of the costs of continuing education between the various actors needs to be achieved, without losing sight of the needs and realistic possibilities of less well-off groups of the population. In recent years, there has been a clear shift of the burden of continuing education funding towards individuals, with a parallel reduction in both public funds and spending by employers (see the chapter on funding in Nuisl 2008). For people on low incomes, course fees may be a serious obstacle. It remains to be seen whether the measures planned by government, such as educational savings schemes and continuing education bonuses, will show the desired effects. Whatever the outcome, it is still seen as necessary to build a clearer understanding among all those involved – individuals, the business sector and society in general – of the need for lifelong learning, an understanding which sees continuing education as an investment, rather than a consumer good or a cost factor.⁶

Support for continuing education from the Federal Employment Agency

In this context, the recent changes in the grants policy of the Federal Employment Agency and their feared or already apparent consequences, which have had a deleterious impact on the continuing education landscape, give serious cause for concern. The stricter requirements imposed in 2000 on access to continuing education grants have led to an overall decline in continuing education enrolments of around 65%. The anticipated or intended ‘market rationalisation’ of provision associated with drastic cuts in expenditure may well have caused the collapse not just of frivolous providers but also of small providers unable cope with financial uncertainty.

The new priority given by the Agency to short-term training courses predominantly aimed at immediate entry into the labour market also gives rise to reservations. What may seem sensible short- or medium-term labour market policy, may in the longer term actually increase the shortage of skilled labour and make it more difficult to reintegrate the unemployed into the primary labour market. In order to guarantee sustainable skills development, a re-orientation is called for, so that people with a genuine need for retraining are not denied skills training in the long term.

Public responsibility for continuing education, holistic education and inclusion

Measures to increase motivation on the demand side need to be matched nationally by similar basic provision on the supply side, offering general, political, cultural and vocational continuing education. It is a government responsibility to put into practice the stated intention of building up continuing education into a recognised fourth pillar of education that is of equal value, as

set out in the agreement between the political parties (Coalition Agreement 2005). One major challenge may be to maintain, or create, an integrated vision of education, which gives equal support to vocational and to general continuing education, in recognition of the latter's significant impact on the economy and society.

Besides specialist occupational knowledge and skills, individuals need to understand societal, social, political and cultural relationships, and to develop their personalities, values, and so-called 'soft skills'. Only if people can combine all of these, will they be able to find their way around, to function in, and to help shape, a complex and changing society. One important task is therefore to give appropriate priority in educational policy-making, planning and activities to areas such as political education, health and family education, and not least intercultural education. This priority will include, for example, opportunities for release from work for education and training purposes, including education that is not work-related.

A key challenge facing adult education and the education system as a whole is the current social divide resulting from economic inequality and the consequent marginalisation of disadvantaged groups. Adult education should play its part by reaching these groups with suitable provision and helping them to participate in all major areas of the life of society. This applies particularly strongly to people from a migrant background, who have to date been clearly underrepresented in continuing education. Among other measures, this means expanding cooperation with migrant organisations and increasing the proportion of migrants in the teaching staff of adult education establishments.

Professionalisation and quality (of teaching)

Well-trained full-time staff are regarded as essential to high-quality continuing education. However, the field of continuing education is hugely affected by political and structural change at the present time. The pressure to make massive savings, to which institutions are increasingly exposed, has led in recent years to large-scale job cuts. The social position of continuing education staff is becoming equally insecure, as a recent study commissioned by the Federal Ministry of Education and Research shows (WSF 2005). The combination of poor pay and heavy work-load is making it increasingly difficult to recruit the next generation of suitable staff. Continuing education therefore has to be made more attractive as a profession in future. There is also a considerable need for (follow-up) training for teaching staff in continuing education, as the study mentioned also reveals. We need to establish exact needs and to develop appropriate initial and in-service training formats. Furthermore, attention needs to be given to any existing shortcomings in quality of teaching in all current quality management procedures – including the Learning-Oriented Continuing Education Quality Testing developed for adult education.

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And lastly, action needs to be taken urgently in the light of the current change in demography that is affecting Germany particularly strongly, by comparison with other countries,⁷ so that continuing education appropriate to an ageing society is developed. This means both the nature of provision and its content. Provision needs to be created that is specifically tailored to the needs of older people, to complement provision which is generation-neutral, and training in teaching the elderly needs to be provided across the curriculum, having particular regard to the results of brain research.

Counselling and support

The creation of greater willingness in people to pursue continuing education is regarded as a priority task. This should be backed by support structures that make it easier for individuals to find their way around the complexities of provision, the lack of transparency of which has been criticised for years. If citizens are expected to make their own choices about their educational and occupational careers, the continuing education system must provide a publicly funded, unbiased counselling structure to support the full development of the individual, so that people have enough information to take decisions about continuing education for themselves. There is seen to be a need for networking of existing advisory and counselling services, and for additional provision of this kind to be made available. This will require long-term public funding, to ensure that counselling provision is not tied to short-term project support. As in the case of continuing education provision itself, there is a need for greater professionalisation of staff in the area of counselling, and for quality assurance.

In this context too, one particular challenge is that of reaching more successfully the environments that are 'alien to education', in order to put an end to the existing 'two class society' in continuing education. It is therefore vital that counselling should not be available solely online, but that personal, face-to-face advice should also be expanded.

The areas for action and challenges facing German adult education set out above do not claim to be exhaustive. Nor, for reasons of space, do they cover all the points expressed by the experts surveyed. Other matters raised but not discussed in detail here, relate, among other things, to improved transferability between sectors of education through recognition of informal learning; modularisation and certification of skills sub-sets; and improved cooperation between Laender, given the regional nature of responsibilities in the Federal Republic of Germany, in order to further develop adult education by, for example, developing standardised continuing education statistics in the medium term. However, the points discussed earlier represent recurrent themes that are regarded as urgent and relevant to future policy action by key representatives of general and vocational continuing education practice, albeit with differences in emphasis.

4. A look ahead

What can German adult education expect from CONFINTEA VI? Certainly not immediate resolution of all or even of some of the many issues facing us. However, we can expect:

- Improved 'public relations', to maintain and enhance public awareness of the benefits of adult education and of its growing importance in the context of the whole of society, for example through increased presence in the media.
- Reinforcement of a holistic concept of continuing education. Greater appreciation of continuing education is one of the expectations repeatedly expressed, although the emphasis varies, not surprisingly: those involved in continuing education in the business context, for example, would like to see a stronger role for continuing education in making products and services competitive as a result of CONFINTEA. A signal effect is also hoped for, stressing the investment nature of continuing education and therefore encouraging the development of motivational activities. From another quarter, very clear expectations are expressed of reinforcement of a holistic concept of education, guided by the key notions of equal opportunities for participation, promotion of democracy, the autonomy of the learner, and opposition to excessively one-sided functionalising of learning. The steps taken by CONFINTEA V in this direction, which are seen as welcome, should now be pursued and expanded by CONFINTEA VI.
- Exchange of ideas and peer learning: issues such as education policy priorities in other countries reveal many parallels: in relation to the ageing society, for example, or the integration of migrants. In domestic planning, it is well worth looking at both positive and negative experiences of the models adopted to deal with these, always making due allowance for differences of context. Informative and valuable information about recent developments in adult education can be expected from the national reports drawn up for CONFINTEA VI, from both a national and an international perspective.
- Strengthening of the international dimension of adult education: the conference will provide an opportunity to establish and expand international cooperation and networking structures among key players in continuing education – representatives of governments, NGOs and experts. If used sensitively, international benchmarking, which is also encouraged by events such as CONFINTEA, can help to identify weaknesses at national level, and to bring about appropriate changes, in the allocation of educational resources, for example.
- Development of joint action strategies and recommendations: by assessing what has been achieved so far and analysing the current situation, CONFINTEA will take forward and update the shared agenda for adult education.

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In considering the potential impact of the UNESCO International Conference, it should be borne in mind that CONFINTEA has the status of what is known as a Category 2 Conference of the international community, which means that decisions and recommendations made at it are pertinent to UN Member States. It is therefore in the immediate interest of all those involved in continuing education that CONFINTEA decisions and documents should incorporate their priorities and positions, since these decisions and documents can be expected in turn to influence educational activities at national level. This is particularly the case in Germany, where public awareness of international aspects of education and learning has grown considerably in recent years, chiefly in response to comparative studies such as PISA and TIMMS. It is therefore not unrealistic to expect that CONFINTEA VI will have a clear impact on the national debate. For this to happen, the information needs to flow in more than one direction, so that the results of CONFINTEA are widely acknowledged in the discussion of educational policy and practice in Germany.

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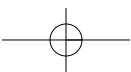
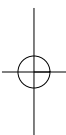
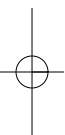
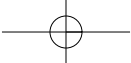
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Notes

- ¹ The terms adult education and continuing education are used synonymously in this paper.
- ² The contributors to the report were: the Federal Ministry of Education and Research, the Conference of Ministers of Education of the Länder, the German Adult Education Association, the German Institute for Adult Education, the Federal Literacy Association and the Federal Institute for Vocational Education.
- ³ Experts were consulted at the following institutions: Arbeitskreis deutscher Bildungsstätten e.V. (Committee of German Educational Centres, AdB), Bundesinstitut für Berufsbildung (Federal Institute for Vocational Education, BIBB), Bibliothek & Information Deutschland (Library and Information Germany, BID), Bundesarbeitskreis Arbeit und Leben (Federal Work and Life Committee, AuL), Bundesarbeitsgemeinschaft Familienbildung und Beratung e.V. (Federal Committee on Family Education and Counselling, AGEF), Bundesverband der Träger beruflicher Bildung (Federal Association of Vocational Education Providers, BBB), Deutsche Evangelische Arbeitsgemeinschaft für Erwachsenenbildung (German Evangelical Adult Education Committee, DEAE), Deutscher Industrie- und Handelskammertag (German Federation of Chambers of Industry and Trade, DIHK), Deutscher Volkshochschul-Verband (German Adult Education Association, DVV), Deutscher Gewerkschaftsbund (German Confederation of Trade Unions, DGB), Deutsches Institut für Erwachsenenbildung (German Institute for Adult Education, DIE), Forum DistancE-Learning, Katholische Bundesarbeitsgemeinschaft für Erwachsenenbildung (Distance e-learning Forum, Catholic National Committee for Adult Education, KBE), Kuratorium der Deutschen Wirtschaft für Berufsbildung (German Business Council for Vocational Education and Training), Paritätisches Bildungswerk, Bundesverband e.V. (PBW, national association providing education and training in the social sector), Wuppertaler Kreis (Wuppertal district authority).

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- ⁴ From spring 2008, a ‘research map’ showing research projects developed jointly by the Adult Education Section of the German Association for Educational Science and the German Institute for Adult Education will be available online at www.die-bonn.de/forschungslandkarte.info/
- ⁵ The participation rate for the non-employed population rose from 26% in 2003 to 29% in 2007. This increase is attributable exclusively to a rise in participation in general continuing education from 20 to 24%, while participation in vocational continuing education over the same period stagnated at the low level of 8% (BMBF 2006, 71). The participation rate for Germans from a migrant background rose over the period 2003-07 from 29% to 34%, and that for foreigners from 29% to as high as 39% (BMBF 2006, 78).
- ⁶ In this context, time is just as important a resource as funding. In order to increase investment in continuing education, greater thought should be given in the work-related context to considering and implementing tools such as learning time accounts.
- ⁷ Forecasts predict that only half of the population will be of employment age by 2050, compared with more than 30% of 65 years of age and above, and around 15% under 20 years of age (Statistisches Bundesamt 2006, 5).



János Szigeti Tóth

DOCUMENTING AND ANALYSING THE RESULTS OF NON-FORMAL ADULT EDUCATION: THE HUNGARIAN EXPERIENCE

Abstract

Many valuable activities and local innovations go on in the field of non-formal adult learning. With the pressures of day-to-day work it is impossible to have a systematic overview of these, so that they are forgotten and are not continued, developed or passed on to others. More generally, these activities fail to be documented and analysed, even though they could be the key to further development. Such documentation and analysis have now been attempted in a project in Hungary, using a method similar to the European Open Method of Co-ordination (OMC) strategy. OMC is an especially suitable tool in the field of education and training. It is applied under Articles 149 and 150 of the European Union Treaty as a part of educational strategy. According to the definition in the Lisbon Conclusions, OMC is a way of achieving convergence in working towards the most important EU goals. According to the Conclusions, the method is completely decentralised and builds on partnership. Its goal is to help Member States gradually to develop their own policies on a given subject. OMC methods include indicators of progress, exchange of good practice, regular monitoring and peer reviews that create mutual learning. These methods and tools have been used in a decentralised way to document the experiences of non-formal adult learning in Hungary. The article summarises the results of that project.

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DOCUMENTAR Y ANALIZAR LOS RESULTADOS DE LA EDUCACIÓN NO FORMAL DE PERSONAS ADULTAS: LA EXPERIENCIA HÚNGARA

Resumen

Muchas actividades valiosas e innovaciones locales continúan realizándose en el campo del aprendizaje no formal de personas adultas. Con las presiones del trabajo diario es imposible tener una visión general sistemática de ellas, por lo que quedan olvidadas y no se continúan, desarrollan o transmiten a otros. De forma más general, estas actividades no son documentadas y analizadas, aunque podrían ser la clave para un mayor desarrollo. Un proyecto en Hungría ha intentado realizar esta documentación y análisis mediante el uso de un método similar a la estrategia del Método Abierto de Coordinación Europeo (OMC). El OMC es una herramienta especialmente adecuada en el campo de la educación y la formación. Se aplica de conformidad con los Artículos 149 y 150 del Tratado de la Unión Europea como parte de la estrategia educativa. De acuerdo con la definición de las Conclusiones de Lisboa, la OMC es una forma de alcanzar la convergencia en el trabajo hacia las metas más importantes de la UE. Según las Conclusiones, el método es completamente descentralizado y construido en base a la asociación. Su meta es ayudar a los Estados Miembro a desarrollar gradualmente sus propias políticas sobre un tema dado. Los métodos del OMC incluyen indicadores de desarrollo, intercambio de buenas prácticas, monitoreo y evaluaciones regulares por pares que crean aprendizaje mutuo. Estos métodos y herramientas han sido utilizados de forma descentralizada para documentar experiencias de aprendizaje no formal de personas adultas en Hungría. El artículo resume los resultados de ese proyecto.

LES RÉSULTATS DE L'ÉDUCATION NON FORMELLE DES ADULTES EN HONGRIE

Résumé

Nombre d'activités précieuses et d'innovations locales se passent dans le domaine de l'éducation non formelle des adultes. Les pressions du travail quotidien empêchent d'en avoir une vue d'ensemble systématique, si bien qu'elles tombent dans l'oubli et ne sont ni poursuivies, ni développées, ni transmises à d'autres. D'une manière plus générale, aucune documentation n'a été produite au sujet de ces activités qui ne font pas non plus l'objet d'une analyse, bien qu'elles puissent être la clé pour poursuivre le développement. L'on tente à présent de réunir une telle documentation et de procéder à une telle analyse dans le cadre d'un projet mené en Hongrie, qui a recours à un procédé similaire à la méthode ouverte de coordination (MOC), instrument stratégique européen. La MOC convient notamment dans le domaine de l'éducation et de la formation. Appliquée dans le cadre des articles 149 et 150 du traité de l'Union européenne, elle fait partie de sa stratégie éducative. Selon la définition qui en est donnée dans les conclusions du traité de Lisbonne, la MOC est un moyen de faire converger les efforts entrepris pour réaliser les principaux objectifs de l'UE. D'après ces conclusions, cette méthode est complètement décentralisée et se base sur la notion de

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partenariat. Son objectif consiste à aider les États membres à développer leurs propres politiques concernant des sujets donnés. La méthode de la MOC fait appel, entre autres, à des indicateurs d'évolution, à des échanges de bonnes pratiques, à une surveillance régulière et à l'évaluation par les pairs pour générer un apprentissage mutuel. Ces méthodes et outils ont été utilisés de façon décentralisée pour décrire les expériences d'éducation non formelle des adultes en Hongrie. L'article résume les résultats de ce projet.

The systematic collection of 'good practice'

Throughout Europe, hundreds of thousands of people, organisations and institutions, and indeed whole countries, perform well or badly, with ups and downs, slowly or quickly, in all spheres of social life. There have been numerous debates at the European level stemming from the fact that organisations and Member States have prepared good practice reports that are so meaningless that they fail to provide an interpretable picture: what is the significance of the good practice in that particular field?

I remember the moment in 2003 when we released the translation of the *guidelines* from Brussels on good practice at the general assembly of the Hungarian Folk High School Society and started familiarising ourselves with and applying the 'good practice approach'. In our case it was important largely because we had heard many times at our forums how many valuable activities and local innovations were going on in our organisations, yet it was impossible to achieve a systematic overview. As a result, much was forgotten and neither continued, developed or was passed on to others. These activities failed to be documented, systematised or analysed, even though they could be the key to further development – we said as much to each other on many occasions. The method we used was not very far removed from the European Open Method of Co-ordination strategy. The requirement to publish the results of particular projects received a strong boost in Europe in the early 2000s, as part of the Lisbon Strategy effort to enhance the motivation to develop lifelong learning. It was realised that huge investment in development programmes was too often generating little return in the sense that partnerships and results simply disappeared once the projects finished and were not being built into the mainstream of professional activities.

One of the first and most important reactions to this at European level was the introduction of the requirement of *sustainability* as a *criterion* in the tendering process. The next phase included the requirement for *dissemination*.

Since education and culture are two of those areas in the 27 Member States of the EU that only play a supplementary or supportive role, the so-called Open

Method of Co-ordination (OMC), already used in social and employment policy, began to be applied in the fields of education, training, adult education and lifelong learning from 2000–02. OMC is a European development method used in the most developed countries to *decentralise* from the top down in a productive and creative way, and is applied according to national and local interests. This is how the first systematic collection of good practice came about in Hungary, following the familiarisation and experiments conducted at the HFHSS general assembly.

Decentralisation according to the Lisbon Strategy

The Open Method of Co-ordination (OMC) is an especially suitable tool in the field of education and training. It is applied under Articles 149 and 150 of the European Union Treaty as a part of the educational strategy. According to the definition in the Lisbon Conclusions, the Open Method of Co-ordination is a way of achieving convergence in working towards the most important EU goals. According to the Conclusions, the method is completely decentralised and builds on partnership. Its goal is to help Member States to gradually develop their own policies on a given subject.

OMC methods include indicators of *progress*, exchange of good practice, regular monitoring and peer reviews that create mutual learning. The EU Commission accepted a recommendation in 2003 dealing with guidance on good practice. The tool of cooperation between Member States can be applied at national, regional and sub-regional as well as at organisational level. There is an even more important expression besides ‘peer review’: peer learning. It is a commonplace view that learning informally from peers is much more effective than learning enforced from the top.

New European adult education and development documents

The Hungarian Folk High School Society (HFHSS) thought it was high time to give a new impetus to this activity, and this led to the publication of documents on the development of adult education and lifelong learning in 2006 and 2007.¹ This programme was supported by the Ministry of Social Affairs and Labour in 2008.

It is clear that the creation of these documents will give a new urgency to the development of adult education over the coming years, using the results and interpretations of systematically collected ‘good practice’. When we adopted the OMC method, adapting it to both national characteristics and EU requirements, we included the collection of good practice in our programmes.

The place of non-formal learning

Another of the many reasons why HFHSS felt it was especially important to promote this activity in Hungary was to emphasise the importance given to non-formal adult education at European level. Especially these days, the two documents mentioned above repeatedly stress the need to consolidate non-formal and all non-traditional forms of learning. There is an international trend that the more adult education and the entire system of lifelong learning are developed, the more high-quality non-formal adult learning is encouraged institutionally and financially, with considerable social participation. Where the theory and practice of lifelong learning are less well-developed, as in Hungary, non-formal learning carries less weight in every sense: in recognition, support, quality and participation rates.

It is a common Hungarian habit to overlook the existence of non-formal learning, as if it were not there. Although we always mention it, its interpretation and scope are limited to *workplace* non-formal learning. Non-formal learning at the workplace is a significant scene of learning in the modern knowledge-based economy, but only if such a corporate culture has been formed already and is a part of a well-developed vocational and further education system. That is not our subject here, but it is a fact that no recognition is given in Hungary to workplace non-formal learning. It is an obvious matter of self-interest to claim that non-formal learning is important. However, emphasising non-formal learning is not just a Hungarian phenomenon, and in Hungary, the formal system also faces obstacles. While we know that non-formal and informal learning has a significant yet unexplored role within the context of formal education and training, budgetary support has suffered many cuts in Hungary, that distribution mechanisms obstruct more efficient and up-to-date thinking and practice.

One of the most important, perhaps hidden, messages of the two new EU documents is that the acknowledgement of non-formal learning should be formalised, because learning outcomes will not increase as fast as is needed without that. However, Europe faces the problems of an ageing society and economic production that lags behind that of some parts of Asia. Researches show that a much higher number of adults participate in non-formal learning than in formal learning, and non-formal learning has significant benefits for the economy, wealth, health and quality of life. Here again, unfortunately, the more developed countries have been able to respond by thinking in the long term and, moreover, by integrating non-formal education into their overall development policies. At the same time, the less developed countries have fallen into the trap of thinking only in the short term, usually providing modest and ineffective adult education funding. There are not enough resources, but the lack of cost-effectiveness is an even greater problem. The transparency of the entire

application and tendering process and other, perhaps more significant problems related to the lack of efficiency tests, are not included in this discussion.

The picture revealed: not comprehensive but a first 'milestone'

What has been said so far has hopefully raised some interest, so what *innovative collection methods* did the HFHSS working group come up with. It should be said at the outset that the highly valuable data collected already provide a unique illustration of the practice of non-formal adult education in Hungary. However, this is just the first step. The *guide*, which was approved after lengthy discussion, suggests how the materials should be used. I would like to emphasise that there was a conscious effort to cover *all sectors and types of adult education* where possible, and not just folk high schools, even though HFHSS is presently one of the most comprehensive non-formal adult education organisations in Hungary.

Good practices have been grouped by regions instead of subjects. We cannot say that these examples represent all current Hungarian good practice, but if anyone was left out, that was not deliberate. We can say that we made a conscious effort to involve everyone: corporations, employment centres, adult education institutions, private businesses and other civil and non-profit organisations, as well as folk high schools. We did not select or give preference or prioritise, since adult education can in our opinion only be successful if it acts together. And it needs success badly.

A few examples of the subjects and the good practices collected

Western Danubia

Training programme for prisoners
Creating an integrated labour market service system – an alternative approach
Educating women on maternity leave
Wine tourism training

Central Danubia

Increasing opportunities for rain men – working with children with autism
Therapeutical masseuse training
Folk high school course on historical issues
Ethnic music circle
English as the language of work
Exercise for women club

South Danubia

Complex village catering training

Training civil organisations in the fields of culture and civilisation

PC world for pensioners

Central Hungary

Self-help English study circle

Village research as a method

Training youth helpers

Motivating the employment of women in small villages and farms

Personal and team building programme

North Hungary

Improving citizenship quality in marginalised regions

Vocational education for multiply disadvantaged Roma adults

Health-improving lifestyle courses

Handicraft training for the re-integration of women into the labour market

Multiple language online courses

Puppeteer training

North Great Plain

‘I will have a better life as of tomorrow’ course

Second chance school

Training of trainers

Folk high schools for the aged

South Great Plain

Help and new opportunities for graduates

Free university for pensioners

Patients’ health clubs

Gardening training for the long-term unemployed

Looking ahead

Numerous examples could not be included in the data collection due to limitations of time and finance. A good number of the examples are drawn from projects funded by Hungarian or international tender. This means that the intention to improve relates not only to our regular provision, where we all have dreams that will probably remain dreams, given the demands of everyday survival. The interpretations of good practice represent different levels, and the majority bear the characteristics of the tedious, dry wording of final reports to funding bodies.

In fact we have scarcely mentioned another fundamental problem of the national and international tendering procedure: that there is hardly any professional quality assurance, monitoring, post-analysis, effectiveness assessment or analytical reasoning in the majority of activities. Most of the concern is with money: anyone winning a tender is given the chance to spend what they have been given, even if this has to be done through a maze of bureaucracy. No one usually asks what the measurable professional and social benefits turn out to be.

This does not mean that those who call for tenders do this consciously or that those who apply are not creative, eager and excellent professionals. In the majority of examples there is proof that people doing their job on a very high level have been involved. However, we should not forget that one beneficiary complained in the report that the project sponsors regarded the recipient almost 'as a thief' and not a professional partner. Unfortunately this situation extends beyond adult education, and is a fair insight into conditions in our country.

We feel that there is too little analysis in the examples of good practice, too little examination of the connections between things, and it is clear that the authors generally choose the easy way, providing descriptions without deeper analysis or conclusions. In some cases of activities supported from project funding it is not evident what will happen to sustainability and whether replication is feasible.

The most widespread, fundamental conclusion of this collection is that there is no far-reaching, national adult education development policy. Instead, the focus is on structural development that relies on individual initiatives that have some assurance of sustainability, and on integrating the various activities in the direction desired by government, so that excellent achievements can raise the country's European profile and involvement in Europe. This is not impossible, but existing national policy can most generously be described as 'ad hoc'.

The reporting of good practice varies: some can 'sell' the little they have done for a lot, while others fail even in the introduction to mention the full value of the whole of the activity. Learner-centred cooperation and collaboration between institutions, sectors, regions, etc., still remains a long-term goal. However, the report provides opportunities for significant peer learning, in which those in charge of social and other specialist policy areas can learn from their peers. The data may also be of importance to education professionals, especially in promoting a change in perspective, and may lead to a fundamental reform of the mechanisms of support policy (quality assurance and focus on achievement).

Life goes on, and we shall further develop the good practice of systematic collection and analysis. It is important for this work to continue as one of

UNESCO's adult education activities, and to be extended outside EU Member States, since mutual learning plays a major part in adult education development.

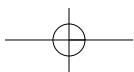
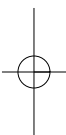
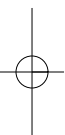
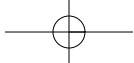
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Notes

- ¹ See: http://ec.europa.eu/education/policies/III/adultcom_en.html
And http://ec.europa.eu/education/policies/adult/com558_en.pdf



Anelia Dimitrova

TOWARDS CONFITEA VI: LIFELONG LEARNING ADVOCACY IN SOUTH EASTERN EUROPE

Abstract

Adult learning is a field that has so far been neglected in education and training reforms in South Eastern European countries and territories but which is beginning to emerge as an important policy area. Further efforts are needed to foster national policy debate about the importance of lifelong learning (and adult education as a vital component of it) for increasing the employability and competitiveness of the people and the countries in the SEE region, and for strengthening social cohesion, active citizenship and personal development. The peculiar post-war situation in the region requires additional efforts from all actors involved in terms of new skills to build trust and reconciliation between divided communities. Against this background, the regional office of DVV International initiated a new project in 2008, aimed at promoting lifelong learning in the region by empowering adult education experts in the region to conduct more effective lobbying and advocacy for lifelong learning, using in particular the upcoming International Conference on Adult Education – CONFITEA VI – as both an advocacy tool and a mid-term goal.

HACIA LA CONFINTEA VI: ABOGACÍA POR EL APRENDIZAJE A LO LARGO DE TODA LA VIDA EN EUROPA SUDORIENTAL

Resumen

El aprendizaje a lo largo de toda la vida es un campo que hasta ahora ha sido desatendido en las reformas educativas y de formación en los países y los territorios de Europa Sudoriental, pero que está comenzando a surgir como una importante área política. Se necesitan más esfuerzos para fomentar el debate político nacional acerca de la importancia del aprendizaje a lo largo de toda la vida (y de la educación de personas adultas como uno de sus componentes fundamentales) para aumentar la empleabilidad y la competitividad de las personas y los países en la región de Europa Sudoriental, y para fortalecer la cohesión social, la ciudadanía activa y el desarrollo personal. La peculiar situación de posguerra en la región requiere esfuerzos adicionales de todos los actores involucrados en términos de nuevas habilidades para construir la confianza y la reconciliación entre comunidades divididas. En este contexto, la oficina regional de DVV International inició un nuevo proyecto en 2008 cuya meta es promover el aprendizaje a lo largo de toda la vida en la región mediante el empoderamiento de expertos en educación de personas adultas para que dirijan de forma más efectiva las presiones políticas y la defensa del derecho al aprendizaje a lo largo de toda la vida utilizando, en particular, la próxima Conferencia Internacional sobre Educación de Personas Adultas, CONFINTEA VI, tanto como una herramienta de defensa de los derechos como una meta a mediano plazo.

LA DÉFENSE ET LA PROMOTION DE L'APPRENTISSAGE TOUT AU LONG DE LA VIE EN EUROPE DU SUD-EST DANS L'OPTIQUE DE LA CONFINTEA VI

Résumé

Si l'éducation des adultes a jusqu'à présent été traitée comme le parent pauvre dans les réformes de l'éducation et de la formation entreprises dans les pays et territoires de l'Europe du Sud-Est, elle commence à devenir un domaine politique important. Davantage d'efforts seront toutefois nécessaires pour favoriser les débats politiques nationaux sur l'importance de l'éducation tout au long de la vie (et sur l'éducation des adultes en tant qu'élément vital de celle-ci) pour l'amélioration de l'employabilité et la compétitivité des gens et des pays dans la région de l'Europe du Sud-Est, et pour le renforcement de la cohésion sociale, la citoyenneté active et le développement personnel. La situation particulière de l'après-guerre dans cette région exige que tous les acteurs fassent des efforts supplémentaires pour acquérir de nouvelles compétences pour installer la confiance entre les communautés divisées et les réconcilier. Dans un tel contexte, l'office régional de DVV International a créé un nouveau projet en 2008, visant à promouvoir l'apprentissage tout au long de la vie dans la région en habilitant des spécialistes locaux de l'éducation des adultes à mener des activités de lobbying et à défendre l'apprentissage tout au long de la vie plus efficacement. Pour cela, ils devront notamment avoir recours à la prochaine conférence internationale sur l'éducation – la

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CONFINTEA VI – aussi bien en tant qu’outil de défense et de promotion des intérêts de l’éducation des adultes que comme objectif à mi-parcours.

1. The background to the lifelong learning advocacy project in South Eastern Europe

For a better understanding of the background to the regional DVV International project in the SEE region, a short overview of the adult education context is needed (see European Training Foundation 2006).¹

Over the past decade the countries and territories of South Eastern Europe have faced, and continue to face, unprecedented changes in the political, economic and social spheres. The economic transition and privatisation reforms have had a major impact on the skill needs of enterprises on the one hand, and have led to high unemployment, especially long-term unemployment, on the other. Despite the efforts of these countries to strengthen their economies, economic growth has been slow and job growth minimal. Poverty and social exclusion have increased, and the social and economic divide between people with relevant skills for the market and those with obsolete or low skills continues to widen. Countries and territories that emerged from the break-up of the former Republic of Yugoslavia have also had to come to terms with the aftermath of a war that left communities and economies in disarray. Community divisions and ethnic tensions need to be addressed alongside economic restructuring. This in turn requires people with advocacy skills and the ability to reconcile different communities.

Also, the evolving impact of the global knowledge economy has increased the pressure on the economy to raise the quality and level of skills, and on workers to upgrade their competences in order to remain employable. Key skills (such as ICT, communication in the mother tongue and foreign languages, and entrepreneurial competences) are increasingly important for employment and self-employment. Despite these general trends, the current demand for skills in local labour markets may not yet reflect such skill shifts, because transition is ongoing and economic growth is slow. In closed labour markets characterised by low technology, the demand for skilled labour is low and enterprises have, as a rule, no difficulty in recruiting staff. Closed labour markets cannot absorb large numbers of highly skilled workers, and many people migrate to find employment abroad.

Migration has its downside, however – it reduces the supply of the skills needed when economies do start to grow. The challenge for transition economies is to address skill mismatches and skill shortages. These difficulties are compounded by the varying pace of economic, technological and social

change, by the uncertainty of future economic development, making the identification of specific training needs difficult, and by the scale of skill deficits. The enterprises that are under the greatest pressure need to adopt appropriate short-term measures for human resources development. They also need to be forward-looking and to put in place measures that anticipate future skill needs. In practice, this means adopting a range of measures and a systematic approach to strategic human resources planning that is linked to business development.

Responsibility for developing skills is shared between enterprises, government and individuals. Governments and employers have a common interest in economic growth, wealth creation and social progress. These will be hard to achieve without an appropriately skilled and flexible workforce able to adapt effectively to technological progress, new production methods, organisational change and total quality management processes. Individuals, too, need to take responsibility for developing their skills both for career progression and for continuing employability in more turbulent labour markets. Continuous investment in skills throughout life is much more important today and requires an injection of substantial new financial resources from enterprises, individuals and governments. Many institutions, enterprises and individuals are ill-prepared for the complexity and scale of the changes which are fundamentally transforming work and social life.

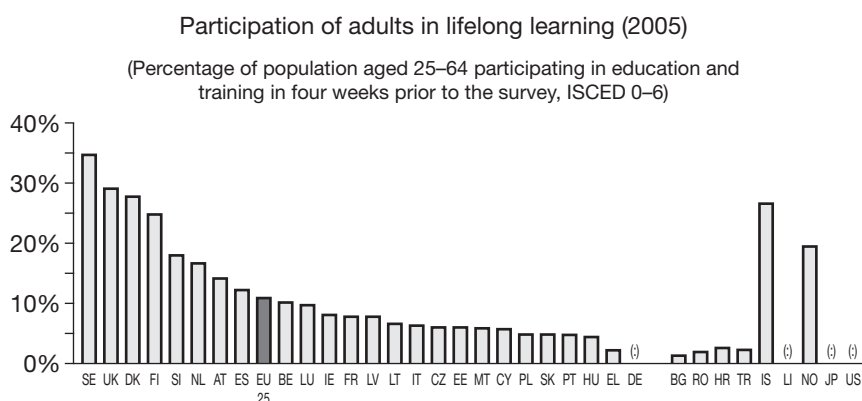
In order to respond effectively to permanent change, OECD countries and EU Member States are now placing much more importance on lifelong learning, which emerged towards the end of the 1990s as a key policy issue and as a strategic response to globalisation, the knowledge economy, constant changes in markets and technologies, growing unemployment and rising social exclusion. In March 2000, the Lisbon European Council set the goal for the EU to 'become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion' (European Council 2000). To achieve this ambitious goal, governments were asked for 'not only a radical transformation of the European economy, but also a challenging programme for the modernisation of social welfare and education systems. 'Furthermore, the European Commission took another step in 2001 by officially promoting the idea of 'Making a European Area of Lifelong Learning a Reality'² (European Commission 2001), according to which lifelong learning is to become the guiding principle for the development of education and training policy. Thus, most of the governments in the EU Member and Candidate States have put in place or are adapting policies and institutional arrangements to ensure lifelong access to opportunities for acquiring the knowledge and skills essential for economic, social and personal development.

While the EU integration process is a major incentive for most of the countries in the region, in particular for states such as Croatia and Macedonia, which have the status of official candidate countries, in South Eastern Europe it is much more the impact of transition that is the driving force for the development of adult learning. There is a need to adapt to the competitive open labour market, which includes both the employed and the unemployed. This means a widespread need for new or more advanced occupational and technical skills, together with new key skills. In particular, there is a need to improve the relevant employability skills of disadvantaged people (young drop-outs, displaced persons, etc.). There have been many developments in training opportunities for adults in South Eastern Europe in the past few years, primarily initiated by donors, e.g. in the development of active labour market measures, the reform of vocational curricula and schools, retraining programmes, specific training programmes for disadvantaged groups, etc. However, adult learning initiatives have often been ad hoc and have generally remained attached to donors' own projects, thus lacking financial and institutional sustainability.

The analyses carried out by ETF show, for the most part, that the former adult learning infrastructure in South Eastern Europe has declined over the past decade and in some cases has collapsed altogether, rather than being a strategic lever for economic and social progress. The current strategies and reports by countries in the SEE region show a positive trend, however, towards higher priority for adult learning in government policy. Furthermore, there are many initiatives – such as the Lifelong Learning Advocacy Project of DVV International – which aim at increasing the attention given by policy-makers, social partners and business to the need for a coherent policy framework that connects up the different strands of economic, labour market, educational and social policy and shows the strategic place of investment in skills, and hence in adult learning. Notwithstanding the intrinsic value of learning, the focus of the adult education and learning policies in South Eastern Europe is on learning related to employment in order to develop skills that empower people to enter into gainful employment or self-employment, to remain employable, and to move out of poverty and social exclusion. This is a typical characteristic of countries in transition with scarce financial resources, in which education and training are the main tools for fostering competitiveness, employment and economic growth.

In describing the background situation in South Eastern Europe, one final remark is needed in regard to the two other countries in the region which have recently become EU members – Bulgaria and Romania. Although they have already gone through all stages of the EU pre-accession process, further reforms and efforts are needed to achieve the Lisbon goals and the idea of 'Making Lifelong Learning in Europe a Reality'. One recent study (European Commission 2006, 35–40, and Annex 'Detailed analysis of progress', chap. 6.2)³ found that European average participation in lifelong learning was 10.8

per cent in 2005. This lifelong learning indicator refers to persons aged 25 to 64 who stated in response to the 2005 Labour Force Survey that they had received education or training in the four weeks preceding the survey (including formal and non-formal education). In its Lisbon Strategy, the EU set the goal of reaching 12.5 per cent by 2010. This is one of the five benchmarks of the Lisbon Strategy. One of the most striking results of the study is that the lowest participation rates in Europe are in Romania and Bulgaria, 1.6 and 1.3 per cent respectively, well below those in other Member States. These figures are a clear indicator of the need for more coherent and more effective lifelong learning policies in both the new EU Member States if they are to move closer to the EU benchmark.



Source: Eurostat (Labour Force Survey)

2. The role of the lifelong learning advocacy project in South Eastern Europe

This was the context in which the regional Lifelong Learning Advocacy project in SEE was launched by *DVV International*, with the following goals:

- To promote lifelong learning and adult education in South Eastern Europe, focusing in particular on the preparation for the forthcoming CONFITEA VI;
- To further develop the established networks between the different stakeholders in lifelong learning (ministries, adult education providers, social partners, NGO sector, international organisations) at local, national and regional level;
- To empower adult education experts in South Eastern Europe in terms of more effective lobbying and advocacy for lifelong learning by training and providing them with practical and theoretical tools and know-how;

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- To strengthen the position of the civil society sector in the national and international decision-making process;
- To raise the public awareness of the importance of lifelong learning for personal and occupational fulfilment in the rapidly changing globalised world nowadays.

The specific inspiration for the project came from the International Academy for Lifelong Learning Advocacy in Uruguay 2007, organised by the International Council for Adult Education (ICAE) for young committed adult education specialists from all over the world. One of the main issues discussed there was the forthcoming CONFINTEA VI in Brazil in 2009. CONFINTEA is the biggest international forum for adult education and learning, and has been organised as a worldwide UNESCO conference since 1949. It is primarily an intergovernmental conference (for the governments of UNESCO Member States) but over the years the NGO sector has achieved an ever greater impact: at the last CONFINTEA V in Hamburg, NGOs were full (even if non-voting) participants, and ICAE had the leading role in organising and consolidating the views of NGO representatives.

The main aims of the next CONFINTEA VI in Brazil are to renew the international momentum for adult learning and education, and to redress the discrepancy between insights and discourse on the one hand, and the lack of systematic and effective policies and facilities for adult education and learning on the other. The CONFINTEA VI preparatory process, conference and follow-up will make possible a global review of the state of adult education and learning, and will serve as a sounding board for the most relevant political, cultural, social and economic issues that are emerging in international education and development. Furthermore, CONFINTEA VI will offer the opportunity to locate adult education and learning within the major current international policy frameworks for education and development: the Education for All (EFA) goals and the Millennium Development Goals (MDGs), as well as the United Nations Literacy Decade (UNLD), the Literacy Initiative for Empowerment (LIFE) and the United Nations Decade of Education for Sustainable Development (DESD). Finally, CONFINTEA VI will play a part in producing the tools (e.g. benchmarks) to ensure that previous and future commitments to adult education and learning are implemented (UIL 2007).⁴

The Lifelong Learning Advocacy Project in South Eastern Europe has evolved against this background, and has already produced some very fruitful results.

2.1. Project activities

In order to achieve its ambitious aims, the project is being carried out in the following series of stages.

The first regional seminar in Tirana, Albania, brought together representatives of different relevant stakeholders in the adult education field – Ministries of Education and of Labour and Social Affairs, parliamentary education committees, national VET agencies, adult training boards, employment agencies, universities and of course the civil society sector, mainly DVV International and other local NGOs. One of the main aims of the seminar was to create a shared vision and understanding of the way in which national reports should be prepared for CONFINTEA VI, looking at potential problems and suggesting how these might be tackled. The national reports will play an essential role in the overall CONFINTEA preparation process, because they will constitute a major input for the regional reports, will provide critical data for the preparation of the Global Report on Adult Learning and Education (GRALE), and will be included in the working documents of CONFINTEA VI. Finally, they will offer an excellent opportunity for each Member State to assess the progress of the national EFA agenda, in relation to literacy, adult learning and non-formal education, to improve data collection in adult learning and education, and to establish continuing and sustainable cooperation between stakeholders at national and international level before and after CONFINTEA VI. Furthermore, adult education specialists will learn more about the international framework for advocacy for lifelong learning and adult education, and about the power and interrelationships of the different actors. They will also become more familiar with the elements, tools and techniques of advocacy. Finally, a joint plan for lifelong learning advocacy at national level in each country, depending on the specific context, will lead to the creation of coalitions and networks involving different actors at national level (various ministries providing adult education, employers and trade unions, other NGOs, private providers, UN agencies and other international organisations, etc.). These will in turn contribute to the national reports for CONFINTEA VI.

In the second stage, which is running at the moment, trained adult education specialists in the project countries in South Eastern Europe have been actively involved in preparing the national reports through existing networks, as well as in other activities to raise public awareness of adult education and lifelong learning. On the basis of the national reports, and with the guidance of the two project coordinators from DVV International Bulgaria and DVV International Serbia, a regional report is being drawn up to present the state of adult education and learning in South Eastern Europe at the European Preparatory Meeting for CONFINTEA VI in Hungary, 3–6 December 2008.

In the final, third stage of the project, there will be a second regional seminar in Podgorica, Montenegro, in September/October 2008, where the same expert group from Tirana will gather to finalise the regional report for South Eastern Europe. They will also discuss and agree on the next steps needed in advocacy and lobbying in association with participation in the European regional preparatory meeting in Hungary in December 2008, and in the sixth

International Conference on Adult Education in Brazil, in May 2009. Both aims, the drafting and publication of a regional report for CONFINTEA VI and the participation by at least two representatives of the South Eastern Europe region, will be financially supported by the regional office of DVV International in Sarajevo, Bosnia and Herzegovina. The final aim of the Lifelong Learning Advocacy Project is thus to ensure that adult education organisations in South Eastern Europe make the greatest possible contribution to achieving the goals of CONFINTEA VI.

2.2. Project outcomes

At the time of writing (30 May 2008), the following progress has been made in the South Eastern European countries concerned in the areas of building coalitions to draw up the national reports for CONFINTEA VI and initiating a broad national consultation and advocacy process for adult education and learning.

Although there are contextual differences between the eight SEE countries, there is at least one common feature in the process of preparing the national reports. In all of them, the initiative came from the DVV International office. This proves once again the power and influence of the civil society sector in the region. It is regarded as one of the main driving forces in countries in transition, where governments are not stable and persistent enough to ensure sustainable development and public support for what are unpopular reforms in all spheres (political, economic and social); NGOs not only have the expertise but are also closer to hard-to-reach populations. Partnerships with the NGOs are therefore needed, at local as well as at regional and international level.

Though there are many shared historical and cultural traditions, three main groups of countries can be distinguished in South Eastern Europe, in accordance with the state of their adult education provision and their preparation for CONFINTEA VI. First, there is a group that managed to establish relatively quick coalitions with all relevant stakeholders thanks to good contacts with 'friendly' governments or personal relations with powerful government experts. This applies above all to the Republic of Macedonia, where it was possible to establish a working group rapidly because of the good relationship between DVV International and the Ministry of Education and Science. This group was called the Expert Commission of the Government of the Republic of Macedonia and consisted of representatives from various ministries (Education and Science, Culture, Labour and Social Affairs, Finance and Economic Affairs, Agriculture and Forestry, and Health) as well as representatives from national VET agencies, the Employment Agency, other government agencies, Chambers of Commerce, the Crafts Association, international organisations, NGOs, local government, private adult education providers, the National Office for Statistics and the University of Sts Cyril and

Methodius. A number of non-governmental and professional organisations in the field of adult education also contributed to the report (Ministry of Education and Science, Macedonia 2008).⁵ In Macedonia, the advocacy activities and skills of the DVV International experts combined with the political will of the Government to give priority to adult education and learning. This increased the synergy effect of the partnership and led to excellent results: the first Macedonian Adult Education Act recently became law, for example. The Republic of Macedonia was the first of the eight SEE countries to submit its national report to the UNESCO Institute for Lifelong Learning in Hamburg.

Serbia is the second country in this first group of 'winning coalitions'. Although the government did not officially declare adult education and learning to be one of its top priorities, an expert group responsible for drawing up the national report was also established relatively fast. It brought together representatives of the Ministry of Education, the Ministry of Economic Affairs and Regional Development, the National Employment Service, the Institute for the Improvement of Education, the Adult Education Department of the Faculty of Philosophy, the Institute for Pedagogy and Andragogy of the Faculty of Philosophy, the Adult Education Association NGO (a DVV International representative), along with consultants from the commercial, financial and statistics sector (Ministry of Education, Serbia 2008).⁶ In the case of Serbia, the advocacy efforts of the civil society sector, represented by DVV International, were very well complemented by the diplomatic and persuasive advocacy strategy of certain distinguished experts within the Ministry of Education. This formula proved successful in placing the national report on adult education for CONFINTEA VI on the political agenda. As a result, the Serbian government also managed to submit the national report on time – by 30 April 2008.

The second group of countries, which could be said to have made 'slower progress', includes Bulgaria, Romania, Albania and Montenegro. Although widely differing in socio-economic and cultural context, there are similarities in the way that the preparation process for CONFINTEA VI has been initiated and operates. One of these is the problem of bureaucracy, or more specifically the problem of tracing the progress of the official UNESCO letter inviting the National Commission to start a consultation process with all stakeholders on CONFINTEA VI. Thus, identifying the persons and institutions directly responsible for writing the national report was the first big obstacle. This has been a very time-consuming stage in all these countries and has led to delays in submitting the reports.

In Bulgaria, DVV International has made an attempt to set up an expert group similar to those in Serbia and Macedonia. However, official approval for such an expert group has to be given by the Minister of Education, which is a very cumbersome bureaucratic procedure and had not produced a positive result by the end of April. This being so, the project coordinator from DVV

International established an informal working group including NGOs and other experts from ministries, the National VET Agency, the National Statistical Institute and the largest university in Sofia, St Kliment Ohridski. The report is in its final phase of preparation and will be submitted by 1 June to the Ministry of Education and Science, where the Directorate of International Affairs has given an undertaking to hand it officially to the Minister of Education, who must approve it finally and sign it.

The process in Romania has been similar, and was particularly helped by the training seminar in Tirana. The representatives of DVV International Romania arranged a meeting with the Secretary of State within the Ministry of Education, Research and Youth, which is officially responsible for preparing the national CONFINTEA report. The meeting was also attended by experts from the Committee for Education, Science, Youth and Sport of the Romanian Parliament and the National Adult Training Board of Romania, who participated in the training in Tirana. A first draft of the report was drawn up at the end of April/early May and an expert group is currently working on improving and finalising the report. The end result is expected in early June.

In Albania, the Director of the National VET Agency reported at the training seminar in Tirana that there had been discussions about membership of the official committee since the beginning of April, following initial communication difficulties with the government. This committee, which will also involve the civil society sector, represented by the *DVV International* experts in Albania, will be officially responsible for drafting the national CONFINTEA VI report. At the time of this publication a short draft of the report has already been prepared under the leadership of the National VET Agency in Albania.

In the last country belonging to the 'slower progress' group, Montenegro, the main concern is that before the regional seminar on lifelong learning advocacy, nobody had really been aware of CONFINTEA or of who was responsible nationally for UNESCO affairs. However, after the regional seminar, the representatives of the National VET Agency set up an informal working group to draft the national report for CONFINTEA. This includes representatives of other national agencies such as the Employment Agency, the Chamber of Commerce and Industry, the social partners, the Agency for the Development of Small and Medium-Sized Enterprises, the Centre for Human Resource Development, and the Centre for Development of the Civil Society Sector. A draft version of the report was submitted in mid-May to the Ministry of Education, which is officially responsible for approving and signing it.

Finally, there is also a third group of South Eastern European countries involved in the project in which all policies, including adult education and learning, are governed by the unique political context. In the first of them,

Bosnia and Herzegovina, it was very difficult for the DVV International representatives to identify and establish contact with the people responsible for UNESCO affairs because of the complicated political situation, with 14 Ministries of Education. The official contact data submitted by UNESCO were no longer up-to-date, so the communication process was hindered from the very beginning, either by national or international factors.

In the last country in this group, Kosovo, the political status of an independent country itself is questioned by most international organisations, first and foremost the UN. This is of course a serious obstacle to preparing a national report for a UNESCO conference, and it is much more difficult for the civil society sector to carry out advocacy with the government and to convince it of the importance of adult education and lifelong learning. However, after the regional seminar in Tirana, the two representatives of the Ministry of Education and the Ministry of Labour and Social Affairs did set up an informal working group including representatives of DVV International (ARrK). In order to strengthen the consultation process and raise public awareness, especially among policy-makers, an additional training seminar on CONFINTEA VI and the role of adult education and learning will be held in mid-June 2008, also within the framework of the regional Lifelong Learning Advocacy Project of DVV International.

All project activities and project outputs will be reported on the project website (www.lll-see.org), making them more accessible to the general public and policy-makers not only at national but also at European and international level.

Remarks in lieu of a conclusion

At this stage of the project, which has only just started and is still gaining momentum, it is still too early to draw conclusions as to outcomes. From the brief country reports and the holistic overview of adult education in South Eastern Europe, it is clear that the transition process which all countries in the region are going through can both hinder and be a driving force for development. The ongoing reforms of the legal framework and the building of institutional capacity offer a wide opportunity for advocacy activities and for influencing the reform process in the desired direction. In some countries, where there is good cooperation between the government and the civil society sector, advocacy is much easier and more effective than in others. In every case, international support from the European Union, UN agencies and other international organisations is playing an important role in speeding up the reform process and putting additional pressure on unwilling governments from outside (e.g. by using CONFINTEA as an advocacy instrument to persuade national governments to put adult education and learning on the political

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agenda). Shared traditions and understanding of issues (even a shared language), and exchange of good practice within the adult education institutions in the region, are factors that facilitate networking and advocacy in the context of CONFINTEA VI.

However, there are also some weaknesses that have a negative influence on the process, such as lack of awareness (both generally and among policy-makers), lack of reliability and commitment on the part of governments, weak social partners, lack of coordination, lack of infrastructure, poverty, illiteracy, unemployment, low motivation for learning, corruption, 'brain drain', etc. These problems were identified by the adult education experts in Tirana as the most serious, needing to be tackled in the next few years in order to speed up the process of EU integration and help the young EU Member States – Bulgaria and Romania – to fulfil their commitments to the EU, and improve their competitiveness by developing a highly educated and skilled population.

One final remark: the Lifelong Learning Advocacy Project of the regional office of DVV International in South Eastern Europe may serve as an example of how a small group of thoughtful, committed people can bring about change, if not everywhere all at once, then country by country, region by region and step by step, striving towards a better world for all.

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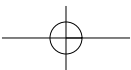
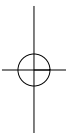
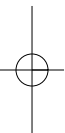
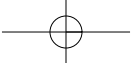
Notes

- ¹ The following analyses are based on the report *Designing adult learning strategies the case of South Eastern Europe* by the European Training Foundation, and published by the European Commission in 2006, available online on the website of ETF: <http://www.etf.europa.eu/>
- ² Communication from the Commission *Making a European Area of Lifelong Learning a Reality* Brussels, 21.11.2001, COM(2001) 678 final, available online: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2001:0678:FIN:EN:PDF> , accessed in May 2008
- ³ Commission of the European Communities: Progress towards the Lisbon objectives in education and training. Report based on indicators and benchmarks. Report 2006, 35– 40, and its Annex 'Detailed analysis of progress', chapter 6.2.
- ⁴ UIL NEXUS – Special issue of the electronic newsletter of the UNESCO Institute for Lifelong Learning (UIL), August 2007, CONFITEA VI Sixth International Conference on Adult Education (2009)

- ⁵ See National Report of the Republic of Macedonia, Government of the Republic of Macedonia, Ministry of Education and Science, April 2008, available at:
<http://www.unesco.org/uil/en/nesico/confintea/confinteacountries.htm>
- ⁶ See National report on the Development and State of the Art of Adult Learning and Education in Serbia, Belgrade, April 2008, available at:
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BEYOND RHETORIC: A RECIPE FOR CIVIL SOCIETY ACTION ON LITERACY

Abstract

On the eve of CONFINTEA VI, discussion and debates on promoting literacy is being revived. However, in most cases, the discussion limits itself to the definitional nuances of literacy and falls short of critiquing the global policy making inertia that violates the human rights obligations to the millions of adults remaining illiterate. This article examines the definitional dilemma of literacy and the magnitude of the challenge of illiteracy. Second, it examines how the policy making process has moved beyond the nation states to global alliances, thereby diluting the social contract between the citizen and the state. Third, it delineates how literacy has become a relegated priority within the EFA framework. Fourth, it tracks the gap between promises and performances since CONFINTEA V. Finally, it proposes an agenda for action for civil society at national, regional and international level.

MÁS ALLÁ DE LA RETÓRICA: UNA RECETA PARA LA ACCIÓN DE LA SOCIEDAD CIVIL SOBRE LA ALFABETIZACIÓN

Resumen

En la víspera de la CONFINTEA VI se reviven las discusiones y los debates sobre la promoción de la alfabetización. Sin embargo, en la mayoría de los casos, la discusión se limita a los matices relativos a la definición de alfabetización y no llega a criticar la inercia de elaboración de políticas globales que viola las obligaciones de los derechos humanos de las millones de personas adultas que continúan siendo analfabetas. Este artículo analiza el dilema relativo a la definición de alfabetización y la magnitud del desafío de la alfabetización. En segundo lugar, analiza cómo el proceso de elaboración de políticas se ha desplazado más allá de los estados nación hacia alianzas globales, diluyendo de este modo el contrato social entre el ciudadano y el estado. En tercer lugar, delinea cómo la alfabetización se ha transformado en una prioridad relegada dentro del marco de la EPT. En cuarto lugar, sigue la pista de la brecha entre las promesas y su cumplimiento a partir de la CONFINTEA V. Finalmente, propone una agenda para la acción para la sociedad civil a nivel nacional, regional e internacional.

L'INTERVENTION DE LA SOCIÉTÉ CIVILE EN MATIÈRE D'ALPHABÉTISATION

Résumé

À l'aube de la CONFINTEA VI, les débats sur la promotion de l'alphabétisation se sont ravivés. Cependant, dans la plupart des cas, les discussions se bornent à aborder les nuances qui différencient les définitions de l'alphabétisation et manquent de critiquer l'inertie de la politique mondiale violant le droit de millions d'adultes qui restent illettrés. Cet article se penche sur le dilemme existant au sujet de la définition de l'alphabétisation et sur l'ampleur du défi que constitue l'analphabétisme. Deuxièmement, il aborde la façon dont le processus politique a dépassé les États-nations pour arriver au stade des alliances mondiales, édulcorant dans la foulée le contrat social entre le citoyen et l'État. Troisièmement, il décrit la façon dont l'alphabétisation a été reléguée parmi les priorités du cadre d'action de l'EPT. Quatrièmement, il se penche sur le fossé existant entre les promesses et les réalisations depuis la CONFINTEA V. Enfin, il propose un calendrier d'action pour la société civile aux niveaux national, régional et international.

1. Origin

This discussion note is a collective output and draws on the stimulating discussions in the virtual seminar organised by ICAE (International Council for Adult Education) in April, 2008. It attempts to capture the input around literacy from various strata of civil society participating in the seminar.¹ It draws on various documents on the state of literacy and its interface with the rights

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discourse. It also proposes a probable campaign process, strategy and advocacy entry points based on the national, regional, and international advocacy and campaign experience of ASPBAE. The objective of this paper is to stimulate discussion in the thematic seminar on the concrete policy demands that the civil society organisations can articulate and campaigns they can undertake in the process leading to the CONFINTEA VI and beyond.

2. Literacy: A definitional dilemma

Defining literacy, even setting its scope and boundaries has been a problematic issue and has led to endless debate. Searching for a definition that will be acknowledged unanimously has proven to be an elusive agenda. This paper will not venture into that inconclusive direction. However, some ideas around literacy articulated in the virtual seminar can provide much food for thought.

On one hand, people think that the context of adult literacy needs to be redefined and linked to contemporary and emerging issues like climate change, migration, knowledge-based society, renovation of ethnic identities and globalisation. Given these contexts, there was a suggestion to have in adult literacy such topics as global warming, ecological literacy, ecological pedagogy and others that will grapple with the realities of climate change. It is also felt that literacy should have strong forward linkage with employment and food security.

On the other hand, it was noted that there is a tendency to underestimate the value and empowerment implied in access to literacy and learning to read, write and calculate (in written form). It is not helpful to integrate everything that the poor need to learn, as literacy does not eradicate poverty but it helps people cope better with their lives. So, to mix up literacy when we mean other competencies may blur or weaken the advocacy for proper funding of adult literacy as the base for adult education.

With these two opposing views in sight, we can delve into the landscape delineated by global assessment of literacy.

3. Magnitude of the task at hand

To have an idea about the staggering extent of illiteracy, it should suffice to look at the following snippets of information from the EFA Global Monitoring Report 2008:

- Illiteracy is receiving minimal political attention and remains a global disgrace, keeping one in five adults (one in four women) on the margins of society.

- Worldwide, 774 million adults lack basic literacy skills, as measured by conventional methods (self-reporting). Direct measurement of literacy skills would significantly increase the global estimate of the number of adults denied the right to literacy.
- Of the 101 countries still far from achieving 'universal literacy', 72 will not succeed in halving their adult illiteracy rates by 2015.
- Most countries have made little progress during the past decade in reducing the absolute number of adult illiterates, with the notable exception of China.
- More than three-quarters of the world's illiterates live in only fifteen countries, including eight of the nine high population countries (E-9). In most of the fifteen countries, adult literacy rates have improved since 1985–1994, although continuing population growth translates into increases in absolute numbers of illiterates in several countries.
- Overall, illiteracy rates are highest in the countries with the greatest poverty, a link observed right down to the household level. More generally, for various social, cultural or political reasons, certain populations – such as migrants, indigenous groups and people with disabilities – suffer reduced access to formal education and literacy programmes.

Even without getting into a quibble about the definition used for literacy and their comparability across countries, it can be safely concluded that the scenario looks quite bleak.

4. Policy making at global level: gradual eclipse of the rights discourse

Since the Jomtien Conference in 1990, policy-making at global level has supplanted the traditional State-centred system. A plethora of issues was addressed in these global summits in the last decade of the last millennium. As Tomasevski (2003) observed, these summits were careful to circumvent the rights discourse, by listing wrongdoing without pointing to wrongdoers, writing commitments without defining who is responsible for translating words into action, and ignoring accountability for using means that defy the professed ends. In most cases, outcomes reflect the minimums acceptable to all, inoffensive wish lists that quickly go down into bureaucratic oblivion after the signing ceremonies. Each conference sets a price tag on the funding necessary to achieve agreed goals that tend to project a manifold increase in existing allocations. The abyss between assistance needs and existing flows concoct a recipe for inertia. A vicious cycle emerges, where waning funds rationalise failure to attain posited targets, and funds shrink because envisioned targets have not been attained.

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Perhaps not surprisingly, the '90s decade has also seen the inexorable conversion of education from a human right into a development objective, at a time when the key development goal is to halve the number of people living in absolute poverty. EFA goal on literacy closely emulates that, by promising that the literacy rate to be increased by 50%. This has two serious flaws. First and foremost, 'a lottery based determination of those to be left out clashes with the very notion of rights' (Tomasevski 2003, 101). Planning to leave half of all illiterate still in the shackles after the target year brings forth the crucial questions, who to be left out, by whose criteria, and – most importantly, why. The second flaw may be considered a rhetorical issue, strictly speaking, a 50% improvement in literacy is impossible for countries that already have literacy rates above 67%. EFA GMR on literacy solves this by interpreting this goal as implying 50% reduction in illiteracy rates (UNESCO 2006). But the question of exclusion of the neglected half still remains. According to Tomasevski (2003), the human rights approach is anchored in holding governments accountable for their pledges. Once a pledge becomes a human rights obligation, failure to attain agreed ends becomes a violation, to be redressed by compensating the victims and ensuring that it is not repeated. However, the current trend of projecting goals in the future takes away the edge from the urgency to act now. The responsibility for today is evaded by projections for tomorrow.

But it would be quite unfair not to attribute some achievements to these global summits. In the best of cases, they have provided grand visions which the participating countries can aspire towards. For example, the Jomtien conference provided a vision for the education of the future, whereas the Dakar conference tried to take it forward to focus on a framework for action. But as Packer (2007) pointed out, while the world has made significant strides to agree on basic human rights through legally binding UN conventions and political commitments, the international community has found it very difficult to design politically acceptable and influential structures to help give these norms effect. However, it can hardly be an argument for not doing better. But it is perhaps useful to admit that whilst broad, conference inspired frameworks are important in themselves, as reference points, and as platforms for action, they rarely lead to comprehensive plans and initiatives. Literacy agenda has to be advanced internationally and most crucially politically, on many fronts (recognising that the 'real action' to take place is at country level) within and beyond the EFA Policy Architecture.

5. Global initiatives on education: literacy in the backseat?

After the Dakar Framework for Action was developed and Millennium Development Goals were declared (where only two of the six EFA goals were included), the international community stepped up on the development

diplomacy efforts to come up with globally coherent initiatives. While UNESCO was the first to propose a global framework for action, the mandate was later moved to World Bank to convene and host a 'Fast Track Initiative' on education. The FTI openly used the EFA banner in its inception but later focused solely on Universal Primary education UPE. With the understandable pressure to extend the cycle of basic education in schools and expand secondary education, the disparities that exist between schooling and other forms of basic education may well become further accentuated. This fact compounded by the overriding influence of the MDGs in development discourse, the lack of strong national and international champions and campaigns for literacy, and the absence a well-articulated economic case for the non-schooling/institutional elements of EFA, means that convincing governments and donors to build an inclusive learning system remains difficult, if not impossible (Packer 2007).

Against this unpromising backdrop some efforts are being made to widen interest and action for a broad based approach to EFA. UNESCO recognises nine, EFA 'Flagship' Initiatives, described as multi-partner collaborative mechanisms in support of EFA goals (literacy among them). The UN Literacy Decade (UNLD) is nearly halfway through its mandate. UNESCO has also created a ten-year framework of collaborative action, the Literacy Initiative for Empowerment (LIFE), which is the key operational mechanism for achieving the goals and purposes of the UNLD in countries with a literacy rate of less than 50% or an adult population of more than ten million without literacy competencies. However, to date there is relatively limited evidence or evaluation of their efficacy.

While talking about the global initiatives on education as a part of policy architecture and fueled by the aid mechanism, it is impossible to ignore the effects of the macro-economic policies prescribed by IMF, the gatekeeper of aid as assigned by the neo-liberal discourse. Until recently, half the countries with an IMF loan agreement were subject to an explicit cap on their public sector wage bill. The largest group paid for out of this public sector wage bill are teachers. Teacher salaries are frozen when a cap is imposed and new teachers cannot be hired. Paying adult literacy facilitators or adult education tutors becomes unthinkable. In the face of IMF policies it is almost impossible for countries to make significant new investment in education, pushing literacy back still further (ActionAid International 2006).

However, there are some positive shifts in the tide. FTI still remains the only multi-lateral initiative poised to address funding needs to fulfill EFA (with a myopic focus on UPE); but two countries (among 30 or more on the FTI list), Burkina Faso and Benin have both had education sector plans endorsed by the FTI which include significant components of adult literacy. But this is not common knowledge and the FTI secretariat has not communicated this endorsement to aspirant countries.

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6. Progress since CONFINTEA V: a chronicle of despair?

To identify CONFINTEA's position within the aforementioned assumptions and conclusions on the global scenario, it is not necessary to look any further than the Mid Term Review document of CONFINTEA V. The transition from euphoric optimism to abject disappointment is quite evident there. While it is acknowledged that 'CONFINTEA V codified a paradigm shift from adult education to adult learning', it also admits the unintentional but insidious side-effects – 'This shift has, on one hand, positive implications in terms of encouraging a wider, more holistic appreciation of education – one transcending the merely formal sector, unfolding as a lifelong process, responsive to the different needs and varying contexts of learners themselves. On the other hand, it threatens to transfer, especially in a globalised, market-oriented context, the onus of educational responsibility to learners, who increasingly must pay for services of poor quality, along with civil-society organisations and the market itself. It thus allows for States to abdicate their responsibility for providing citizens with good and relevant educational opportunities. Especially in situations of widespread poverty, however, the withdrawal of State support seems premature. Furthermore, the emphasis on adult learning itself is in danger of losing sight of the needs of the almost one billion adults with little or no literacy despite the commitments made in 1997 in The Hamburg Declaration and The Agenda for the Future, adult education and learning has not received the attention which it deserves in major education reforms and in recent international drives to eliminate poverty, achieve gender justice, provide education for all and foster sustainable development' (UNESCO 2003, 16). What it does not conclude overtly, is that the shift from adult education to learning (based on lifelong learning concepts) drives a wedge between the interests and priorities of the North and the South. While the Northern countries can afford to invest in the broader agenda of adult learning, the Southern countries would struggle to mobilise resources even for the bare minimum of literacy programmes. Thus, the shift has served to dilute the agenda and skew the priorities.

Understandably, the alarming effect of dilution is also identified in the midterm document – 'Midterm Review of the worldwide situation of adult education and learning...has, in fact, revealed a disturbing regression in the field. For we have seen a decline in public funding for adult education and learning, even as the minimal adult literacy goal set in the Dakar Framework for Action is achievable – requiring just US-\$ 2.8 billion per year. Furthermore, support by various international agencies and national governments alike have concentrated on formal basic education for children to the detriment and neglect of adult education and learning' (UNESCO 2003, 18). This dismal revelation is self-explanatory, necessitating deep meditation on what went wrong and how to proceed, without repeating past mistakes and with the benefit of hindsight.

7. Developing advocacy and campaign agenda: towards and beyond CONFINTEA VI

The above analysis entails critical self-reflection in determining a concerted course of action. It may be assumed that rather than getting bogged down into inconclusive debates about definitional precision of literacy (an often travelled path), it might be more useful to review the route map to CONFINTEA to identify key entry points for advocacy and campaigns and decide a concrete action plan on the process and expected outcomes. It might also be useful to keep in mind that while CONFINTEA VI is going to be a critical policy moment to make States and donors agree to concrete commitments with an accountability mechanism, it is not going to be the ends of ensuring adult literacy but rather a key reference and rallying point at best. Decisive action will have to be planned at the country level.

A. The Route Map to CONFINTEA: Process Engagement Entry Points

National Reports

National reports are to be prepared by all the UNESCO Member States on the occasion of CONFINTEA. While the deadline is looming large (already shifted once from its April deadline), it seems like more of a by the book and closed door bureaucratic exercise (from the Asian experience), rather than a genuine and participatory reflection on the promises and gaps in the commitments made in CONFINTEA VI. Even after the report is prepared, there is the opportunity to critique it constructively before the regional consultations and the main event.

Regional Consultations

Various regional consultations will be ongoing where the voice of the CSOs and NGOs need to be raised. The cynically described '3- Is' tactic of engagement of development agencies with NGOs (Invite them, Inform them and Ignore them!) (Fidler 2000) will need to be challenged strongly at these opportunities.

GRALE (Global Report on Adult Learning and Education)

Key results from the national reports will lead to the preparation of GRALE. The three functions originally envisioned for it – being a reference, a standard for accountability and an advocacy document should be fulfilled through mounting pressure on it. It should also become the beginning of a continuous global reporting mechanism, complementing the EFA GMR report.

Global Action Week

While not part of the original CONFINTEA route map, the Global Action Week of 2009, organised by GCE, is to focus on adult literacy. The right to literacy has been betrayed and the immense mobilising power of calling a betrayed pledge a human rights violation should be evoked on this occasion.

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FTI Mid-Term Review

Also not part of the official CONFINTEA process, the FTI is up for a review in 07–08. It is vital that the limitations of FTI in addressing the whole spectrum are pointed out and these be amended through inclusion of adult literacy in the financing mechanism.

During the whole process, the constant need to inform and engage public opinion should not be forgotten. News and ideas about literacy as a right and as a means of making a difference to the lives of individuals and families, communities and nations should be brought into every household. It's not enough to preach to the converted and make literacy a strictly technical issue in the esoteric domain of the erudite few. Keeping it on everyone's agenda requires attention not only to research and scholarship and to development policy and practice but also to building commitment in media and communication channels to conveying the need for and the benefits of literacy. As Packer (2007) points out, it needs to be portrayed in ways that capture public imagination and garner political will.

B. Content of Advocacy and Campaign Engagement

While the process entry points are quite clear, the content of advocacy and campaign needs to be determined both rigorously and cautiously. The learning from CONFINTEA V needs to be revisited and opinions from the virtual seminar on maximizing the outcome of CONFINTEA need to be heeded in this regard.

- Identify innovative approaches for mobilisation and sensitisation.
- Discuss good practices in developing countries with limited funding.
- Claim accountability from countries that have made commitments but have done nothing to address adult literacy (and education).
- Look into countries in conflict where education has become a last concern.
- Review/call attention of countries that have good policies (e.g. in Latin America) in adult literacy but have stagnated investments in education programmes.

The cornerstone of the content of advocacy could be asking for time bound and accountable policy commitments.

To ensure accountability and to have a monitoring mechanism, having tangible and concrete benchmarks might be useful. Previously agreed quantitative benchmarks, 0.7% of GNI as ODA and 7% of GDP allocation in education have been useful in at least measuring the gaps between promises and performance. Similar benchmarks can also be incorporated. Significant work has already been done in literacy benchmarks by GCE. There is a growing consensus that governments should spend 6% of their education budgets on adult education and

half of that should go to basic literacy. It is difficult to find objective reference points to substantiate these percentages but most specialists agree that at present most governments are spending under 1% of national education budgets on adults and often only a small fraction of 1%. We need to popularise something similar as a reference point.

As a preparatory process for CONFITEA VI, UNESCO convened a technical committee on adult education benchmarks and there was a loose consensus on having benchmarks around three areas – outcome, participation and financing. However, these have not been finalised and still hang in limbo. To ensure tangible commitments, this process needs to be expedited.

However, in the meantime, to build momentum around a concrete agenda that address the broad components of literacy without diluting the focus, the 12 benchmarks proposed by ActionAid, and supported by GCE (ActionAid International 2005), can be put to the forefront. A critical examination and review might be undertaken to consider which of these benchmarks should be strongly and persuasively lobbied for by the civil society to be adopted in the CONFITEA and ratified at the country level. Especially the following key and quantifiable benchmarks might be seriously considered:

Regarding Wage and Training of Facilitators

To retain facilitators it is important that they should be paid at least the equivalent of the minimum wage of a primary school teacher for all hours worked (including time for training, preparation and follow-up).

Facilitators should be local people who receive substantial initial training and regular refresher training, as well as having ongoing opportunities for exchanges with other facilitators. Governments should put in place a framework for the professional development of the adult literacy sector, including for trainers/supervisors – with full opportunities for facilitators across the country to access this (e.g. through distance education).

Regarding Number of Learners:Facilitator Ratio

There should be a ratio of at least one facilitator to 30 learners and at least one trainer/supervisor to 15 learner groups (one to ten in remote areas), ensuring a minimum of one support visit per month. Programmes should have timetables that flexibly respond to the daily lives of learners but which provide for regular and sustained contact (e.g. twice a week for at least two years).

Regarding Cost per Learner

A good quality literacy programme that respects all these benchmarks is likely to cost between US\$50 and US\$100 per learner per year for at least three years (two years initial learning + ensuring further learning opportunities are available for all).

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Regarding Financing Requirement

Governments should dedicate at least 3% of their national education sector budgets to adult literacy programmes as conceived in these benchmarks. Where governments deliver on these, international donors should fill any remaining resource gaps (e.g. through including adult literacy in the Fast Track Initiative).

Apart from these, the global financing deficit needs to be highlighted and resources mobilised around it. Taking into consideration the literacy statistics, which is inherently problematic, the financing gap in South and West Asia and Sub Saharan Africa is around ten billion USD (Ravens and Aggio 2005). A viable financing plan needs to be drawn around that keeping in mind the urgency of mobilising more than a billion dollars every year until 2015 would at least let us meet EFA Goal 4, even though all the people will not be covered. It will also need to be remembered in the campaign that the campaign for literacy should not be a campaign against illiterate people, thus dehumanising the agenda. To meet the overwhelming financing needs, a continuous coordination and engagement mechanism will have to be considered and worked out among FTI, UNESCO (for both its UNLD platform and LIFE framework) and UNGEI.

8. Conclusion?

This opportunity that we have of coming together needs to be optimally utilised to develop strong and passionate agreement on core advocacy and campaign agenda. We need to be convinced that we have gone beyond rhetoric to set our course on definitive and collective action. These actions need to resonate beyond a select practitioners' circle to become a rallying call for the people whose rights have been violated arbitrarily. We need to bear in mind that for taking these actions, 'it is not knowledge we lack. What is missing is the courage to understand what we know and to draw conclusions' (Lindqvist 1992, 2).

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Notes

- ¹ The article draws on a summary of the literacy discussion in the seminar prepared by Cecilia Soriano, National Coordinator, ENet Philippines.

Mona Motakef

THE HUMAN RIGHT TO EDUCATION AS A RIGHT TO LITERACY IN GERMANY

Abstract

There are no official data, but it is estimated that four million adults in Germany have little or no reading, writing and numeracy skills, so that they are known as “functionally illiterate”. This is a fact which was long ignored. In this contribution, literacy activities and research in Germany are analysed through a human rights-based approach. I argue that illiteracy in a knowledge-based society like Germany has to be understood in terms of a lack of social inclusion and participation. In Germany, the aims of the United Nations Literacy Decade (2003-2012) have not yet been achieved.

EL DERECHO HUMANO A LA EDUCACIÓN COMO UN DERECHO A LA ALFABETIZACIÓN EN ALEMANIA

Resumen

No hay datos oficiales, pero se estima que cuatro millones de adultos en Alemania tienen muy pocos conocimientos o no saben leer ni escribir y no tienen nociones de cálculo, por lo que son considerados “analfabetos funcionales”. Este es un hecho que

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ha sido largamente ignorado. Como contribución a esto, las actividades de alfabetización e investigación en Alemania son analizadas a través de un enfoque basado en los derechos humanos. El artículo argumenta que el analfabetismo en una sociedad basada en el conocimiento como Alemania tiene que ser entendido en términos de falta de inclusión y participación social. En Alemania, los objetivos del Decenio de las Naciones Unidas para la Alfabetización (2003-2012) aún no han sido alcanzados.

LE DROIT DE L'HOMME À L'ÉDUCATION EN TANT QUE DROIT À L'ALPHABÉTISATION EN ALLEMAGNE

Résumé

Bien qu'aucun chiffre officiel n'existe, on estime qu'en Allemagne quatre millions d'adultes ne savent ni lire, ni écrire, ni calculer, ou ne possèdent que peu de connaissances dans ce domaine. On les désigne par conséquent de l'expression « analphabètes fonctionnels ». On a longtemps ignoré cet état de fait. L'article se penche sur les activités et la recherche concernant l'alphabétisation en Allemagne, les analysant dans l'optique des droits de l'homme. L'auteur soutient que dans une société du savoir comme l'Allemagne, il faut considérer l'analphabétisme comme un manque d'inclusion et de participation sociale. L'Allemagne n'a pas encore atteint les objectifs fixés par les Nations unies dans le cadre de la Décennie pour l'alphabétisation (2003-2012).

Among the general public, there is little awareness that there are non-disabled adults living in Germany who can barely read, write or add up. A glance at the phenomenon of illiteracy in Germany reveals not only that the right to education is not being delivered in many developing countries, but also that shortcomings are found in countries regarded as knowledge-based in which education has long been compulsory.

In this article, I examine the requirements of the right to education and discuss to what extent this right has been applied in the case of illiterate people living in Germany, with particular reference to gender and migrant background. In conclusion I sketch out the international activities of UNESCO in the field of literacy that are pertinent to Germany. To begin with, however, I look at the phenomenon of illiteracy in Germany. What is the scale, and what are the causes, of illiteracy in Germany?

1. Illiteracy in Germany

It was not until the late 1970s that it was recognised that there were people in Germany who were not adequately literate. Since then, the written language

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requirements of even 'simple jobs' have risen. Furthermore, there has been a decline in jobs overall, and more particularly in jobs in which there is little demand for literacy skills. It is estimated that there are over four million functional illiterates living in Germany (Döbert and Hubertus 2000, 25f.). They would account for 6.3 percent of the population, although there are no exact statistics on the extent of functional illiteracy. The figures vary, depending on the definition of literacy and the method of investigation. Literacy courses have been provided since the late 1970s under the sponsorship of the German Adult Education Association. According to data from the Federal Association for Literacy and Basic Education (the Bundesverband für Alphabetisierung und Grundbildung), around 20,000 adults are currently taking part in literacy courses in Germany. That is very few: if it is assumed that there are four million functional illiterates, the proportion of them attending a course is 0.5 per cent.

Illiterates in Germany form a heterogeneous whole, so that it is necessary to differentiate between different groups. Most of those living in Germany who have low levels of reading, writing and numeracy skills are reckoned to be among the group of functional illiterates. According to UNESCO, 'a person is functionally literate who can engage in all those activities in which literacy is required for effective function of his or her group and community and also for enabling him or her to continue to use reading, writing and calculation for his or her own and the community's development' (UNESCO 2002). Functional illiteracy is thus a relative concept, since whether a person is literate or not depends not only on individual mastery of written language but also on the command of written language expected in the society in which that person is living. If a person's knowledge is lower than what is regarded as the norm, then that person is functionally illiterate.

Numerous immigrants automatically become functional illiterates when they migrate to Germany. In their home countries, considerably lower reading and writing skills are required in working life than in the destination country. Migrants who have not learnt to read in a language using the Roman alphabet also need to be re-taught literacy (Wagner 2007, 97). They have command of a written language, but cannot use it in Germany. A person may therefore possess considerable educational capital in their country of origin, but if they move to Germany and need to learn the Roman alphabet and the German language, they are automatically accounted functionally illiterate in the country of immigration. The same applies to Germans who emigrate to a country that has a different form of written language that they do not (yet) know. However, there is also a number of immigrants who have never been to school and did not migrate to Germany until they were over school age. The term applied to this group is primary illiteracy.

The phenomenon of illiteracy in Germany is underestimated, however, if it is exclusively attributed to lack of schooling in countries of origin. It must

primarily be seen as an effect of the German education system. This was one of the key outcomes of the PISA study: 23 per cent of 15-year-old young people in Germany are regarded as being at risk on account of their weak reading ability (Deutsches PISA-Konsortium 2001, 401). These young people went to school in Germany but did not learn adequate reading, writing and numeracy skills in the course of their school careers. The majority of them are male and relatively poor, and attended lower secondary or special schools. Functional illiteracy is above all a matter of social background, and thus an issue of lack of equality of opportunity. If children and young people grow up in relative poverty, for example, as well as coming from a migrant background, it is statistically highly likely that they will fail in their school careers in Germany. Disadvantaged boys are also less likely to succeed at school than disadvantaged girls. It can be concluded that the notional figure of the 'Catholic rural working class girl' that symbolised limited educational opportunities in the 1970s has been replaced by the 'relatively poor boy from a migrant background'. If illiteracy in Germany is seen primarily as an issue of lack of equality of opportunity, the question arises as to how this lack of educational opportunity can be analysed and combated. An approach based on human rights can be a key way of looking at these matters since human rights, including the right to education, incorporate the right to inclusion and non-discrimination.

2. The right to education and its potential impact

The right to education is not well-known in Germany, so that references to human rights are frequently absent from the debate about educational opportunity. The potential of human rights to shape the argument is used in development cooperation, however (Tomasevski 2003, Friboulet *et al.* 2006). The starting point for the current debate about the right to education as a right to literacy is the 1948 Universal Declaration of Human Rights. Article 26 of that document, on the right to education, already distinguishes between 'elementary' and 'fundamental' education. It also contains wording prohibiting discrimination. No one is to be excluded from the right to education. By differentiating between elementary and fundamental (basic) education, the Universal Declaration of Human Rights includes the right to literacy in the right to education. The injunction to avoid discrimination means that there are no legitimate grounds on which to exclude anyone from the right to education, regardless of age.

The distinction between elementary and fundamental education is also present in the United Nations Social Charter of 1966 and the 1979 Convention on the rights of women. This human right – although the right of adults to fundamental education is not stated explicitly – is also enshrined in the Convention on the Rights of the Child of 1989 and in the UN Convention on the Rights of Persons with Disabilities of 2007.

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Adults should be able to pursue fundamental education belatedly if they have not yet had the opportunity to do so. This was emphasised by the Committee on Economic, Social and Cultural Rights in its General Comment 13 on the right to education. In this General Comment, the major importance of education for adults is highlighted as a means by which they can play a part in society: ‘As an empowerment right, education is the primary vehicle by which economically and socially marginalised adults and children can lift themselves out of poverty and obtain the means to participate fully in their communities’ (Committee on Economic, Social and Cultural Rights 1999, Article 13). In this context, the right to education is described also as an ‘empowerment right’.

Education is intended to enable everyone to play an active part in society. The right to fundamental education thus covers equally all people who have not yet satisfied their ‘basic learning needs’, as the Committee states in Article 13 (2) (d). It is not restricted to those persons who have not attended primary school.

The Committee stresses that ‘enjoyment of the right to fundamental education is not limited by age or gender; it extends to children, youth and adults, including older persons’ (idem). Fundamental education is therefore perceived as an integral component of adult education and lifelong learning. By analogy to a UNICEF definition, primary schooling nonetheless remains the most important component of education.

At all levels of the education system, and hence also in fundamental education, four interlinked criteria need to be met: *the general availability of education, the accessibility of education free from discrimination, the acceptability of education and the adaptability of education*. These four criteria are the structural elements of the right to education, and must be satisfied simultaneously in accordance with freedom from discrimination. They were developed by Katarina Tomasevski, the first UN Special Rapporteur on the right to education. They are intended to serve as an analytical framework for assessing how the right is implemented in quantitative and qualitative terms. This framework was taken up by the Committee on Economic, Social and Cultural Rights and incorporated into General Comment 13 (Lohrenscheit 2007).

3. The implementation of the four structural elements in Germany

I outline below conclusions to be drawn from the current state of research, if the framework for the right to education is applied to literacy practice. I highlight gender aspects and the question of how the right is delivered to people with a migrant background. The following remarks do not represent a final analysis. On the contrary, all that can be stated in many instances is what is desirable. The

Fig. 1: The four structural elements of the right to (fundamental) education

- a) **Availability** – functioning educational institutions and programmes have to be available in sufficient quantity within the jurisdiction of the State party. What they require to function depends upon numerous factors, including the developmental context within which they operate; for example, all institutions and programmes are likely to require buildings or other protection from the elements, sanitation facilities for both sexes, safe drinking water, trained teachers receiving domestically competitive salaries, teaching materials, and so on; while some will also require facilities such as a library, computer facilities and information technology; .
- b) **Accessibility** – educational institutions and programmes have to be accessible to everyone, without discrimination, within the jurisdiction of the State party. Accessibility has three overlapping dimensions:
 - (i) Non-discrimination – education must be accessible to all, especially the most vulnerable groups, in law and fact, without discrimination on any of the prohibited grounds (see paras. 31–37 on non-discrimination);
 - (ii) Physical accessibility – education has to be within safe physical reach, either by attendance at some reasonably convenient geographic location (e.g. a neighbourhood school) or via modern technology (e.g. access to a ‘distance learning’ programme);
 - (iii) Economic accessibility – education has to be affordable to all. This dimension of accessibility is subject to the differential wording of article 13 (2) in relation to primary, secondary and higher education: whereas primary education shall be available ‘free to all’, States parties are required to progressively introduce free secondary and higher education.
- c) **Acceptability** – the form and substance of education, including curricula and teaching methods, have to be acceptable (e.g. relevant, culturally appropriate and of good quality) to students and, in appropriate cases, parents; this is subject to the educational objectives required by article 13 (1) and such minimum educational standards as may be approved by the State (...);
- d) **Adaptability** – education has to be flexible so it can adapt to the needs of changing societies and communities and respond to the needs of students within their diverse social and cultural settings.

Source: Committee on Economic, Social and Cultural Rights 1999, 2f.

remarks are intended rather to launch a debate as to how the potential of the right to education can be used to shape literacy practice in Germany.

3.1 The General Availability of Education

The general availability of education requires there to be adequate provision of education. This requirement is probably one of the most urgent in German literacy work, since there are significant regional variations in the provision of

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literacy courses. In rural areas and the new Federal Länder in particular, not enough literacy courses are available (Döbert and Hubertus 2000, 125). Even in the West German Länder there is a considerable need to catch up, as can be seen in Table 1. In Bavaria, there are 5.1 literacy courses per million inhabitants. This proportion is similarly low in Baden-Württemberg (5.4) and in Thuringia (6.5), while Federal Länder such as Lower Saxony and Hamburg are in an appreciably better position to meet the educational needs of adult illiterates, with 70 and 67.7 courses per million inhabitants respectively (*idem* 126).

The figures in Table 1 give an insight into the provision of courses, but there are no exact data on the actual need for literacy courses. If provision is to be expanded appropriately, this needs to be investigated.

Information about gender is also missing from Table 1. We know little about who uses the courses, and what the relative gender proportions are among functional illiterates. Globally, illiteracy is principally a female problem. UNESCO estimates that two thirds of all the people in the world who cannot read and write are female (UNESCO 2005, 19). In poor countries in particular, girls are more likely to be kept out of school than boys. It is only an assumption that illiteracy affects more women who migrate to Germany than men.

The availability criterion also means that teachers have to be adequately trained. Until now, however, there have been no courses or training offering sufficient preparation for literacy teaching (Löffler 2007, 116). Literacy course tutors generally ‘plough a lonely furrow’ (Döbert and Hubertus 2000, 106). The

Table 1: Availability of courses by Federal Land

Federal Land	Courses per million inhabitants
Baden-Württemberg	5.4
Bavaria	5.1
Berlin	48.2
Brandenburg	10.4
Bremen	15.0
Hamburg	67.7
Hessen	15.7
Lower Saxony	70.0
Mecklenburg-Vorpommern	24.5
North Rhine-Westphalia	28.8
Rheinland-Pfalz	30.3
Saarland	25.1
Saxony	22.9
Saxony-Anhalt	35.9
Schleswig-Holstein	53.1
Thuringia	6.5
Germany overall	26.4

Source: Döbert and Hubertus 2000, 126.

lack of training applies not only to course tutors, however. There is also a shortage of teachers in schools offering general education who are specialists in literacy. They lack the skills and the organisational opportunities to take preventive action to combat illiteracy.

The question of gender also arises in relation to course tutors. Since attending a literacy course is frequently associated among learners with feelings of uncertainty and fear of failure, with the result that considerable confidence first needs to be built up, it can be assumed that it makes a difference to learners whether they are taught by a man or a woman. There are reports from practice that non-literate women who have migrated to Germany prefer to be taught by a woman. In reverse, it can be assumed that non-literate men, with or without a history of migration, would rather be taught to read and write by a male course tutor. These are important questions for further research.

3.2 Accessibility Free of Discrimination

This educational criterion implies that no person may be denied access to education either in law or in practice. Education must be freely accessible, particularly for the weakest groups. Since school attendance is obligatory, primary education is both compulsory and free in Germany, but there are still groups denied access to education. People without papers cannot generally exercise their right to education. Schools have a duty to report them to the aliens' authority (Federal Ministry of the Interior 2007). If their residency status is revealed, they may face deportation. Some young refugees are also unable to enjoy their right to education since they are exempted from compulsory school attendance in some Federal Länder (Terre des hommes 2005). Because of their residency status, these children's literacy is obstructed in Germany. It is questionable whether they will be able to exercise their right to education at a later point in their lives either in Germany or in their country of origin.

Even when the issue of residency status is resolved, it cannot be assumed that people who have migrated to Germany will have access to literacy courses. This may be decided on financial grounds, for example. The Committee on Economic, Social and Cultural Rights clearly states in General Comment 13 that elementary education is to be compulsory and free, and it makes no separate reference to fundamental education. Fees are a major obstacle to access to education, particularly for people who are relatively poor (Tomasevski 2006). The funding of literacy courses is a matter for the Länder in Germany. Institutions generally decide for themselves whether their budgets allow them to offer courses or not (Döbert and Hubertus 2000, 125). This is unfortunate, from the standpoint of access free from discrimination. Secure funding would provide the basis for a nationwide programme of courses.

3.3. The Acceptability of Education

The acceptability of education refers to the form and content of education. It should be relevant, culturally appropriate and of good quality. One significant consideration thrown up by the acceptability criterion is the question of the language in which a person becomes literate. From the educational standpoint, it is recommended that people acquire literacy via their mother tongue (Müller 2001, 25). In many cases, however, mother-tongue literacy will not improve chances of playing a part in the community. If literacy is not taught in the official language, this will not facilitate mobility and employability.

Acceptability raises the issue of the extent to which school pupils feel that they are addressed by educational provision. If 23 per cent of 15-year-olds in Germany attend schools that they leave as functional illiterates, we have to ask how the clearly established close link between social background and educational career can be broken. Educational provision in schools needs to compensate for disadvantages governed by background more strongly than in the past, and to address children and young people for whom the purpose of school education is not evident from their family environment.

Literacy work with adults raises the question of whether teaching methods and materials are suited to the learning needs of adults. In the case of adults who do not speak adequate German, for example, knowledge of German as a foreign language needs to be taken into account in literacy courses. It is vital in such cases to differentiate according to level of education. Consideration should also be given to providing literacy courses especially for women.

3.4 The Adaptability of Education

The adaptability of education is closely connected to the acceptability criterion. Education must match the demands of changing societies and communities. If learners' circumstances change, the education system needs to be adjusted accordingly. In literacy practice, the adaptability criterion is particularly important, since keeping to an immutable list of learning objectives is dysfunctional. Linde and Schladebach (2007, 131) sum this up as follows: 'The content of education must always be guided chiefly by the needs and expectations of course participants, or must help them to develop these for themselves'. This aspect needs to be evaluated if the quality of literacy courses is to be guaranteed. However, since there is still no secure funding for course provision, it is more than unlikely that quality, i.e. adaptability, will be evaluated.

This short overview demonstrates the low degree to which literacy work is institutionalised in Germany. Like the absence of secure funding, there is no nationwide structure and no initial university training. There are also many gaps in research. Little is known about literacy in Germany.

4. Literacy in the context of UNESCO: EFA, CONFINTEA and the UN Literacy Decade

Since the 1990s, literacy work with adults has been one of the main focuses in the international education programmes coordinated by UNESCO, in the context of Education For All (EFA). It is one of the keys to combating poverty. The concept of Education for All is explicitly not restricted to the achievement of primary education, but aims at a more comprehensive approach to education for all age groups, as a basic precondition for personal development.

While the programme of UNESCO aimed at Universal Primary Education in the 1980s, as that title suggests, the Education for All programme adopted in Jomtien, Thailand, in 1990, represented a turning point. In the World Declaration on Education for All approved in Jomtien, literacy programmes are seen as crucial keys to combating violence, gender disparity and poverty. The target agreed in Jomtien was that there should be no more illiterates by the year 2000.

The target laid down in Jomtien was nowhere near achieved. Ten years later, the World Education Forum was organised by UNESCO together with UNDP, UNFPA, UNICEF and the World Bank in Dakar, Senegal. There were still some 875 million illiterates (Baaden 2002, 2). An Education for All Action Plan was adopted in Dakar, setting out six goals to be achieved by 2015:

All countries, including Germany, have made a commitment to draw up national action plans setting out their strategy for achieving their goals. There is no such action plan yet in Germany, although there is no reason for Germany to hold back since Goals 1, 3, 4 and 6 cannot be regarded as met. I have already outlined the limitations affecting achievement of Goal 4, concerning the situation of illiterates. A start has been made in Germany on improving early education, Goal 1, but there is to date no regulated early education: only 53 per cent of three-year-olds and 78 per cent of four-year-olds attend a kindergarten. Germany, where ten per cent of children have not attended any preschool institution before entering school, is among the lower half of all European countries (Baaden 2003, 3). This unsatisfactory situation has a particularly negative impact on disadvantaged children, since disadvantages due to background cannot be compensated for because of lack of places. There is still no equality of opportunity in Germany, as I have already pointed out, in relation to the educational situation of young people in terms of Goal 3, which is to ensure: 'that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes' (Baaden 2002, 2). Background is crucial in determining educational progress. This also reveals shortcomings in the achievement of Goal 6, the quality of education. If educational provision no longer reaches young people, thought must be given to how schools can match what they teach and the methods they use to young

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Fig. 2: Goals of the Education for All Action Plan in Dakar, Senegal, 2000

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality;
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes;
4. Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
5. Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality;
6. Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in numeracy and essential life skills.

Source: Baaden 2002, 2.

people's specific learning needs. It thus becomes clear that action is needed at a number of levels of the education system if illiteracy is to be combated.

The Fifth International Conference on Adult Education (CONFINTEA V), held in Hamburg in 1997, may be seen as a key event (see also Hinzen and Knoll in this volume). Adult education took on a new direction at that conference, being given a new emphasis as a part of lifelong learning. CONFINTEA V formulated a concept of education that focused on an active, self-managed process of lifelong learning. The Director of the UNESCO Institute for Lifelong Learning, Adama Ouane, recalls: 'A concept of adult education strongly influenced by school teaching and centred on courses and programmes that was therefore predominantly "instructive", gave way to a notion of education that emphasised the active, self-directed and above all learner-centred process of learning' (Ouane 2002, 1). Some 1500 delegates from the entire world approved the Hamburg Declaration on Adult Learning and the Agenda for the Future of Adult Learning (UNESCO 1997). In these documents, central importance is given to the call for gender justice in adult education, along with many other demands such as democratic participation and better networking. Conference participants not only made a commitment to counter the marginalisation of girls and women at all levels of the education system. In addition, both genders were to be appropriately represented at the management and decision-making level of education programmes in line with gender mainstreaming. Five years later, at the conference 'Lifelong Learning in Europe: Moving towards EFA Goals and CONFINTEA V Agenda' in Sofia,

Bulgaria, delegates complained that insufficient attention was being given to the role of adult education in many countries, even while the lifelong learning perspective was stressed. Adult education, it was said, was still too little guided by participatory approaches.

On 13 February 2003, the then UN Secretary General Kofi Annan opened the UN Literacy Decade in New York, with the aim of coming closer to meeting the goals of education. The UN General Assembly Resolution on the Literacy Decade requested governments to obtain reliable data on the literacy rate, to improve the quality of education and thereby to develop strategies for overcoming illiteracy (UN 2004). The UN Secretary General called on all governments – including industrialised countries such as Germany – to implement the six Dakar goals. Germany supports the fourth goal of the UN World Literacy Decade, that of halving the number of illiterates in the country. The Federal Minister of Education has already clearly stated as much: under the heading ‘Research and Development on Literacy and Basic Education for Adults’, the Federal Government will make some 30 million euros available over a period of five years (Federal Ministry of Education and Research 2006).

There is therefore reason to hope that the right to literacy will receive greater recognition as part of the right to education, in Germany as elsewhere. If all people are truly to be guaranteed their right to education, the aim of education should be to loosen the prevalent close connection in Germany between background and educational opportunity.

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Michael Schemmann

CONFINTEA V FROM THE WORLD POLITY PERSPECTIVE

Abstract

This paper takes the fact that lifelong learning has become a global formula as its starting point and analyses the political documents and activities resulting from the Fifth International Conference on Adult Education (CONFINTEA V) from a world polity perspective. It examines the extent to which lifelong learning can be seen as a norm within world culture that shapes present-day social actors, i.e. individuals, organizations and states.

CONFINTEA V DESDE LA PERSPECTIVA DE LA ORGANIZACIÓN POLÍTICA MUNDIAL

Resumen

Este trabajo toma como punto de partida el hecho de que el aprendizaje a lo largo de toda la vida se ha convertido en una fórmula global, y analiza los documentos y actividades políticas resultantes de la Quinta Conferencia Internacional sobre la Educación de Personas Adultas (CONFINTEA V) desde la perspectiva de la organización política mundial. Analiza hasta qué punto el aprendizaje de personas adultas puede ser

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visto como una norma dentro de la cultura mundial que moldea los actuales actores sociales, esto es, individuos, organizaciones y estados.

LA CONFINTEA V DANS L'OPTIQUE DE L'ORGANISATION POLITIQUE MONDIALE

Résumé

Cet article se base sur le fait que l'apprentissage tout au long de la vie est devenu une formule universelle pour analyser, dans l'optique de l'organisation politique mondiale, les documents et activités politiques ayant résulté de la cinquième Conférence internationale sur l'éducation des adultes (CONFINTEA V). Il se demande jusqu'à quel point l'apprentissage tout au long de la vie peut être considéré comme une norme au sein de la culture mondiale, influençant les acteurs sociaux d'aujourd'hui, c'est-à-dire les individus, les organisations et les États.

The current international debate on continuing education demonstrates convergence in education policy. It is evident that there is widespread agreement over the concept of lifelong learning at both national and international or supranational level. It is also striking that there is convergence in activities. Educational monitoring and reporting based on indicators, which has now been adopted by the EU, the OECD and UNESCO, and by individual countries, may be regarded as the most obvious example. This paper analyses education policy initiatives and activities at the Fifth UNESCO International Conference on Adult Education (CONFINTEA V) held in Hamburg in 1997 from a world polity perspective, thereby seeking to shed light on the expansion of education and the growing convergence in the content of lifelong learning projects.

Neo-Institutionalism and the world polity approach

Neo-institutionalism is by no means a closed theory approach, being found in various forms in the disciplines of sociology, politics and economics. However, these different applications of it have a common point of reference in that they all differ from research methods which take the individual as the starting point for investigation and are strongly influenced by 'rational choice' theories (Hasse and Krücken 2005).

Unlike functionalist theories, the studies that laid the groundwork for neo-institutionalism in the mid-1970s assume that the behaviours of modern-day actors can only be explained and understood by taking account of the societal

environments in which they are embedded. These societal environments are made up, firstly, of other actors in what is known as the 'organisational field' and, secondly, of a core of assumptions on which there is a broad consensus in the society and which may be described as institutionalised rules: 'Institutionalised rules are classifications built into society as reciprocated typifications or interpretations. Such rules may be simply taken for granted or may be supported by public opinion or the force of law' (Meyer and Rowan 1977, 341).

It is also assumed that organisations are not merely guided by the quest for efficiency, but that the desire for legitimacy is of particular importance. Organisations acquire such legitimacy if they adapt to the expectations of the social environment. In order to secure or even to enhance their legitimacy, organisations adopt concepts from the manner in which work is organised. These concepts, which are heavily influenced by social assumptions, may in fact run counter to considerations of efficiency: 'But conformity to institutionalised rules often conflicts sharply with efficiency and, conversely, to co-ordinate and control activity in order to promote efficiency undermines an organisation's ceremonial conformity and sacrifices its support and legitimacy' (idem).

The consequence of these processes is structural adaptation or isomorphism, for which neo-institutionalism recognises three different mechanisms:

- Probably the most obvious form of 'coercive isomorphism' is the pressure exerted on organisations by the State, through laws and regulations. This pressure may be exercised in a wide variety of contexts, for example when decisions on the awarding of contracts or grants are tied to specific organisational requirements.
- The basic requirement for 'mimetic isomorphism' is a state of uncertainty. This uncertainty can arise when '...organisational technologies are poorly understood, when goals are ambiguous, or when the environment creates symbolic uncertainty' (Di Maggio and Powell 1983, 151). In consequence, organisations begin to be guided by, or directly to copy, the structures of other organisations that are regarded as successful.
- Lastly, isomorphism may result from the normative pressure of work colleagues. Members of a given occupation have a framework of guidance and reference which exerts strong normative power and leads, for example, to preferences in the treatment and solution of problems. A crucial factor in the process of structural adaptation is staff recruitment, since the degree of structural adaptation in an organisation is proportionate to the similarities revealed in the pattern of staff selection. Hasse and Krücken (2005) give the example of the dominance of administrative lawyers in government ministries. The world polity approach of the Stanford Group around John Meyer occupies a special

position within neo-institutionalism theory. The term world polity can best be interpreted as a world culture, in the broad sense: 'Culture is understood rather as a background knowledge that underlies all social practices and generally remains implicit' (Krücken 2006, 141).

World polity is less concerned with actual structures than with an imaginary cultural system that borrows core principles, such as universalism, belief in progress, equality, justice and rationalism, from Western societies. In essence, world polity is underlain by a thesis of globalisation aimed at 'permeating the world by Western principles' (Meyer 2005).

It is crucial to Meyer's assumptions that some structural forms are created and legitimised as part of the process of disseminating these principles worldwide, while others lose legitimacy. Accordingly, countries, organisations and individuals achieve dominance as isomorphic actors in the modern world, supplanting other structural forms such as clans and families (Krücken 2006, 143). Among the empirical evidence for the world polity approach is the huge rise in the foundation of nation-States after the Second World War and the increasing frequency with which organisations sponsor actions that have a major impact on all areas of society and hence also on the individual. These actors cannot be regarded as autonomous from the world polity perspective, however, but achieve recognition in proportion to the extent to which they behave in conformity to the external expectations of world polity (idem).

There is one other factor that should be mentioned in this context. In the world polity approach, particular importance is attached to international governmental and non-governmental organisations: 'IGOs and INGOs create, carry and embody the world culture in the world polity, diffusing policy scripts to states' (Beckfield 2003, 402).

The significance of IGOs is illustrated by Meyer and others using the example of a fictional, newly discovered island society. The authors show how the society will establish a nation-State with the help of international organisations, will train organisations and will grant individual rights to the members of society. There is a focus on the United Nations system:

'... the United Nations system and related bodies (the International Monetary Fund, World Bank, General Agreement on Tariffs and Trade [GATT]) established expanded agendas of concern for international society, including economic development, individual rights, and medical, scientific, and educational development (...) The forces working to mobilise and standardise our island society thus gain strength through their linkage to and support by the United Nations system ...' (Meyer 1997, 163).

In their study, Boli and Thomas (1997) examine nearly 6000 international non-governmental organisations founded between 1875 and 1988. They are able to show *inter alia* that INGOs are greatly underestimated as the drivers of political action in a wide range of policy fields and should be seen as key players:

‘Some INGOs, including sports, human rights, and environmental bodies, dramatically reify the world polity; ... But most INGOs unobtrusively foster intellectual, technical, and economic rationalisation that is so thoroughly institutionalised that they are hardly seen as actors, despite the enormous effects they have on definitions of reality, material infrastructure, household products, school texts, and much more’ (Boli and Thomas 1997, 187. Cf. Beckfield 2003, 402).

The world polity approach has been criticised from a variety of angles. Two of these will be selected here as they are pertinent to discussion of the work of UNESCO and CONFINTEA V. Firstly, mention should be made of the mediatory mechanisms through which the expectations of the environment are transferred to the national and local level. Koenig (2008, 97) finds, for example, that there are few references to social processes, beyond the somewhat general distinctions drawn between isomorphisms, to explain the standardisation of the forms and functions of present-day actors.

The closely connected process of transferring institutionalised global expectation structures to the local level is also largely unexplained. Within the theory offered by neo-institutionalism, this is generally solved by reference to the disjuncture between formal and activity structure. Meyer and Rowan, for example, point to Weick’s proposal of loose coupling and assume that the tension demonstrated in adapting to institutional rules is explained by the development of growing separation between the formal level and actual activities (Meyer and Rowan 1977). Koenig (2008) shows, however, that it is relevant to draw on other theories in this context:

‘However, to explain the selective reception, partial implementation and context-specific interpretation of world cultural frames at the local level, it seems necessary to introduce arguments of historical path-dependency as developed in comparative historical institutionalism’ (Koenig 2008, 98).

Educational policy orientation and CONFINTEA V activities

In the light of this brief sketch of the theoretical argument, we shall now look more closely at CONFINTEA V, at the educational policy documents adopted there and at the resultant activities.

Educational Policy Documents: The Hamburg Declaration on Adult Education and The Agenda for the Future

The Hamburg Declaration and the Agenda for the Future closely associated with it were adopted at the Fifth International Conference on Adult Education (CONFINTEA V) held in Hamburg in 1997. The Agenda spells out the arguments expressed more generally in the Declaration and translates them into a kind of programme of work.

In the Declaration, a central role is accorded to education, or rather to adult education, in the coming twenty-first century: 'Adult education thus becomes more than a right; it is a key to the twenty-first century' (UNESCO 1997, 1). Social and economic changes are among the reasons given for this crucial importance. In the context of the transition to knowledge-based societies, it is argued that adult education is fundamental to both social and working life. Social changes have made it imperative for individuals constantly to update their knowledge and skills.

This provides continuing education with a specific purpose, which is again emphasised in the document in the definition of adult learning:

'Adult education denotes the entire body of ongoing learning processes, formal or otherwise, whereby people regarded as adults by the society to which they belong develop their abilities, enrich their knowledge, and improve their technical or professional qualifications or turn them in a new direction to meet their own needs and those of their society. Adult learning encompasses both formal and continuing education, non-formal learning and the spectrum of informal and incidental learning available in a multicultural learning society, where theory- and practice-based approaches are recognised, (UNESCO 1997, 2).

This interpretation, which goes beyond the boundaries of formal education, may be regarded as linking in with notion of lifelong learning. It is indeed explicitly stated that adult education is embedded in lifelong learning, which is not restricted to learning by adults. Rather, it is made clear that the education and upbringing of children, young people and adults are complementary components of a 'true' vision of lifelong learning (UNESCO 1997, 2).

In international and supranational organisations there is now wide agreement, both on the crucial importance of lifelong learning and on the need to determine its content. The OECD, the European Union, UNESCO, the World Bank and the G8 countries are moving lifelong learning a long way up their policy agendas, and in doing so are demanding that education systems should be comprehensively modernised (cf. Schemmann 2007). From the world polity perspective, lifelong learning can be seen as a worldwide norm of education

policy which is being disseminated by international and supranational organisations as a modern concept that needs to be reflected in national policy if the latter is to acquire legitimacy (see Jakobi 2006).

Such a thesis is further supported by the fact that responsibility for continuing education and lifelong learning is no longer placed solely with national governments in the Declaration itself. Instead, a range of actors need to be drawn in, reflecting the responsibility of the whole of society:

‘Within governments, adult education is not confined to ministries of education; all ministries are engaged in promoting adult learning, and inter-ministerial cooperation is essential. Moreover, employers, unions, non-governmental and community organisations, and indigenous people’s and women’s groups are involved and have a responsibility to interact and create opportunities for lifelong learning, with provision for recognition and accreditation’ (UNESCO 1997, 3).

Furthermore, the thematic areas and target groups to which adult education should, according to the Declaration and the Agenda, pay particular attention, point to similarities with the principles of world culture. Illiterates, women, indigenous groups and older people are named as target groups. The themes highlighted are environmental and health education, the culture of peace and democracy, economic transformation, diversity and equality, and access to information (UNESCO 1997, 4-6). These themes are specified as follows in the Agenda for the Future:

- ‘Adult learning and democracy: the challenges of the twenty-first century
- Improving the conditions and quality of adult learning
- Ensuring the universal right to literacy and basic education
- Adult learning, gender equality and equity, and the empowerment of women
- Adult learning and the changing world of work
- Adult learning in relation to environment, health and population
- Adult learning, culture, media and new information technologies
- Adult learning for all: the rights and aspirations of different groups
- The economics of adult learning
- Enhancing international cooperation and solidarity’ (UNESCO 1997, 11).

Lastly, it is instructive to examine the conference process itself from a world polity perspective. Knoll refers in his paper in this volume to the large number of non-governmental organisations taking part. He points out that it should be remembered that these International Conferences are ultimately governmental

conferences for the Member States of UNESCO, regardless of who attends them. Nonetheless, NGOs were actively involved in the conference process and were responsible, for example, for a large part of the 435 proposals received for changes to documents before they were adopted. From the world polity perspective, this involvement of NGOs is of particular interest, since they are seen as major players in disseminating the principles of world culture. This being so, the method adopted at CONFINTEA V may be seen as strengthening lifelong learning as an integral part of world culture.

The Structure of Activities: The Example of International Adult Learners' Week

In relation to implementation of the shared policy orientations, the Declaration explicitly stresses that the varying political, economic and social circumstances in Member States will result in differing measures. However, two shared activities are highlighted:

‘We are determined to ensure that lifelong learning will become a more significant reality in the twenty-first century. To that end, we commit ourselves to promoting the culture of learning through the “one hour a day for learning” movement and the development of a United Nations Week of Adult Learning’ (UNESCO 1997, 7).

In the follow-up to CONFINTEA V, it is the International Adult Learners' Week that has attracted particular interest. From the world polity perspective, we need to look at the role played by UNESCO in disseminating this norm, and at the local implementation of a global expectation structure.

First of all, it must be borne in mind that the idea of Adult Learners' Weeks did not come about in the context of the International Conference, but has its antecedents in the activities of individual countries. Such an initiative first took place in 1992, in the United Kingdom, and achieved particular success in the area of mobilisation. With the inspiration of this success, the idea was taken up in subsequent years in other countries as well. Adult Learners' Weeks were held, for example, in Australia and Jamaica in 1995, and in South Africa, Slovenia, Switzerland and the Flanders Region of Belgium in 1996 (IIZ/DVV 2002; see also Todorova and Theesen 2003).

Significant backing was given to the expansion of the initiative after CONFINTEA V by the twentieth session of the General Conference of UNESCO, which adopted the following Resolution in 1999:

‘*The General Conference, Bearing in mind the Fifth International Conference on Adult Education, held in Hamburg in 1997, which agreed a Declaration and Agenda for the Future setting out aims, strategies and commitments for adult learning for participating*

governments particular through the development of an International Adult Learners' Week ...

1. *Invites* Member States to participate actively in lifelong learning in a way that meets their own particular needs;
2. *Further invites* Member States to give their support to an International Adult Learners' Week to be launched at Expo 2000 in Hannover on 8 September 2000, to coincide with the International Literacy Day;
3. *Invites* the Director-General to transmit this resolution to the United Nations Secretary-General with a request that he communicate it to the United Nations General Assembly with a view to the participation of all Member States of the United Nations in an International Adult Learners' Week' (Records of the General Conference, 30th Session, Volume 1, Resolutions, UNESCO 1999, Paragraph IV/11, cited in UNESCO Institute for Education 2003, 7).

In this context, the UNESCO Institute for Education in Hamburg, the UNESCO institution specialising in lifelong learning, was charged with acting as the secretariat for International Adult Learners' Week. The Institute was given the task not only of preparing the opening event at EXPO, but also of providing ongoing support for the Learners' Week movement.

The activities of the UNESCO Institute focus on three areas. First, the Institute is concerned with the transparency and visibility of International Adult Learners' Week. A website has been set up, for example, to provide information about the progress of the movement and the various activities in the different countries. This website facilitates the exchange of information between the bodies already involved and allows the wider public access to information about Learners' Weeks (UNESCO Institute for Education 2003, 8).

By organising meetings and conferences, the UNESCO Institute also seeks to facilitate and support the exchange of experience between partners in the Learners' Week network. In December 2001, for example, the UNESCO Institute arranged a meeting in Brussels jointly with the European Union, for the organisers of Learners' Weeks in the European Region. At the third Brazilian Literacy Week, the Institute also invited organisers and coordinators of Learners' Weeks from different UNESCO Regions to a workshop in Brasilia on the national and international implications of the Learners' Weeks movement (UNESCO Institute for Education 2003, 9).

Lastly, the UNESCO Institute supports International Adult Learners' Week through research. In 2002, for example, an evaluation report was produced on the learning festival in Europe, which documented the broad range of activities during the Learners' Weeks in national contexts, among other items.

It is evident from the findings of this report that there are considerable differences in the way in which this global expectation structure is implemented. The length of the learning festivals is not uniformly seven days in all countries, as the title Adult Learners' Week suggests, but varies from one- or two-day events, such as the Festival of Learning in Germany, to 15-day events in Russia (IIZ/DVV 2002, 12).

The stated aims of the Learners' Weeks also vary in the different national contexts. The following are examples:

1. Raising awareness of the importance and advantages of frequent (adult, lifelong, obligatory) continuing education
2. Presentation and demonstration of the range of existing learning opportunities and provision
3. Promotion of cooperation between interest groups, and
4. "Festivals" of adult learners and creation of awareness of these people and their needs' (IIZ/DVV 2002, 8).

Given the list of countries taking part in Adult Learners' Weeks, the differences in aims is hardly surprising. The 'pioneer states' of Australia, Jamaica, South Africa, Belgium, Slovenia, Switzerland and the United Kingdom, which had launched such activities before UNESCO took up the idea, have now been joined, six years after CONFINTEA V, by Botswana, Egypt, Kenya, Mali, Namibia, Swaziland, Japan, the Philippines, Singapore, Brazil and Mexico, as well as 24 countries in the European Region – which includes Canada according to the UNESCO definition (UNESCO Institute for Education 2003, 7). In these circumstances, International Adult Learners' Week may now be regarded as having the character of a movement, although there is a gap between formal structure and the structure of activities, reflecting the analysis of Meyer and Rowan (1977). From the example of Germany it can be shown, however, that the activity may be combined with an existing programme, resulting in a context-specific reshaping of the global expectation structure. The Festival of Learning is an initiative sponsored by the Federal Government and the Länder, but it is also linked to the 'learning region' programme of the Federal Ministry of Education and Research.

It can be deduced from experience in the United Kingdom that holding Adult Learners' Weeks also has consequences at an organisational level. Increasing numbers of partners and sponsors have been taking part in these Learners' Weeks (Bochynek 2003, 174). The very fact that Learners' Weeks are held obviously results in organisations taking part in them and acquiring legitimacy by adapting to external expectation structures, either because they are convinced of their merit, or out of fear of missing out on a fashion.

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Robert J. Hill

**FINDING A VOICE FOR SEXUAL
MINORITY RIGHTS (LESBIAN, GAY,
BISEXUAL, TRANSGENDER,
INDIGENOUS/TWO-SPIRIT, AND
QUEER¹). SOME COMPREHENSIVE
POLICY CONSIDERATIONS**

Abstract

At the invitation of UNESCO in 1997, more than 1,500 representatives of governments and non-governmental organizations attended the Fifth International Conference on Adult Education (CONFINTEA V) in Hamburg, Germany. They laid out a strategy for lifelong learning that omitted rights for lesbians, gay men, bisexuals, transgender, Two Spirit, and Queer people to learn to be, to become, and to belong. At the close of CONFINTEA V, the Rapporteur-General of the Conference declared the need to increase the capacity of all non-traditional actors to participate actively in adult learning opportunities. This never occurred for sexual minorities in most regions of the world. CONFINTEA VI is an opportunity to remedy this unfulfilled promise.

ENCONTRAR UNA VOZ PARA LOS DERECHOS DE LAS MINORÍAS SEXUALES (PERSONAS LESBIANAS, GAYS, BISEXUALES, TRANSGÉNEROS, INDÍGENAS LGBT/ DE DOBLE ESPÍRITU Y QUEER). ALGUNAS CONSIDERACIONES POLÍTICAS EXHAUSTIVAS

Resumen

En 1997, por invitación de la UNESCO, más de 1.500 representantes de gobiernos y de organizaciones no gubernamentales asistieron a la Quinta Conferencia Internacional sobre Educación de Personas Adultas (CONFITEA V) en Hamburgo, Alemania. Diseñaron una estrategia para el aprendizaje a lo largo de toda la vida que omitió los derechos de personas lesbianas, gays, bisexuales, transgéneros, indígenas LGBT/ de doble espíritu y queer de aprender a ser, a convertirse y a pertenecer. En la clausura de la CONFITEA V, el Relator-General de la Conferencia declaró la necesidad de aumentar la capacidad de todos los actores no tradicionales de participar activamente de las posibilidades de aprendizaje de personas adultas. Esto nunca ocurrió para las minorías sexuales en la mayor parte de las regiones del mundo. La CONFITEA VI es una oportunidad de remediar esta promesa no cumplida.

LES MOYENS À DONNER AUX MINORITÉS SEXUELLES DE FAIRE VALOIR LEURS DROITS

Résumé

Sur l'invitation de l'UNESCO, plus de 1500 représentants de gouvernements et d'organisations non gouvernementales assistèrent en 1997 à la cinquième Conférence internationale sur l'éducation des adultes qui se tint en Allemagne, à Hambourg. Ils élaborèrent une stratégie d'apprentissage tout au long de la vie en omettant toutefois d'y inclure le droit des lesbiennes, des homosexuels, des bisexuels, des transsexuels, des intersexués et des travestis d'apprendre à être, à devenir et à avoir sa place. Au terme de la CONFITEA V, le rapporteur général de la conférence annonça la nécessité de mieux permettre à tous les acteurs non traditionnels de participer activement à l'éducation des adultes, ce qui n'arriva jamais aux minorités sexuelles dans la plupart des régions du monde. La CONFITEA VI sera l'occasion de tenir cette promesse.

Introduction

In 1997, at the invitation of UNESCO, more than 1,500 representatives of governments and non-governmental organisations (NGOs) attended CONFITEA V, the Fifth International Conference on Adult Education, in Hamburg, Germany (documents can be found at <http://www.unesco.org/education/uic/confitea/>).

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Conference participants developed ten thematic areas which have direct relevance to sexual minorities (lesbians, gay men, bisexuals, transgender, Indigenous/Two-Spirit, and Queer) as persons, citizens, learners, and workers. Yet more than a decade later, most government policymakers² as well as educators working in adult and lifelong education have neither interpreted nor applied any of these themes in consideration of the rights and needs of sexual minorities. For example, it must be pointed out that, under the theme of adult learning, democracy, peace, and critical citizenship, sexual minorities clearly fall into the rank of second-class citizens in most countries of the world. Sexual-minority individuals and communities are denied full and equal rights, justice and equality, freewill, and the right to organise. They usually do not have full opportunity to participate in civil society and to openly engage in economic development in the formal and informal economies. This composite exclusion deeply impacts the wellbeing and public and personal health of sexual-minority citizens who are disenfranchised from the access and accommodation that go hand in hand with the rights and privileges of citizenship in democratic cultures and societies.

In Hamburg there was a call for governments to adapt to the realities of a host of marginalised peoples. Civil society was challenged to allow marginalised and oppressed individuals to express their aspirations, hopes, dreams, desires and longings, and to create learning opportunities to realise these throughout life. However, lesbians, gay men, bisexuals, transgender, Indigenous/Two-Spirit, and Queer people were not included in the discussion. There was no envisioning of their imaginings to experience justice and to live complete and open lives.

Many of the Articles of the Hamburg Declaration promote gender equality, and Articles 25b, 28, 29, 37b, 38b, and 49d of the *Agenda for the Future* directly address the status of women in positive and powerful ways. Still the unique characteristics and needs of lesbians continued to be overlooked. In fact, evidence shows that sexuality is used to attack women's organising (Long and Fried 2005). Gay men, and the topic of gender identity, were avoided altogether. While CONFINTEA V adopted the perspective of learning throughout life, it failed to live out any notion of lifelong learning for all – sexual minorities were once again deprived of a presence, voice, and location from which to claim the four pillars of lifelong learning: learning to know, to do, to be, and to live together (Delors 1996). Moreover, CONFINTEA V, which was presented as an international adult education conference that would focus on learning to aid the development and survival of citizens, also demonstrated the inadequacy of international adult education as a forum for advancing the human and civil rights of sexual minorities. Despite the rhetoric about the right to learn, lesbians, gay men, bisexuals, transgender, Indigenous/Two-Spirit, and Queer people essentially went unnoticed at CONFINTEA V. As UNESCO's Institute for Lifelong Learning prepares for CONFINTEA VI in Brazil in 2009, it remains to be seen whether sexual orientation and gender expression will have a place in the discussion, and most importantly, in the outcomes of this vital global conference.

In 1997, CONFINTEA V's *Agenda for the Future* claimed that it would '[set] out in detail the new commitment to the development of adult learning... [focus] on common concerns facing humanity...[recognise that] profound changes [were] taking place both globally and locally...[call for] ensuring the legitimate right of people to self-determination and to the free exercise of their way of life and seek to ensure accessibility and quality [for learning]' (UNESCO 1997). Regarding the last situation, Point 18, titled 'Ensuring Accessibility and Quality,' of the *Agenda for the Future* called for developing and adopting legislation, comprehensive policies and cooperation mechanisms among adult learning initiatives related to different institutions and sectors of activity. For sexual minorities, this never materialised on a global scale.

What will the future hold?

For some of us, there is hope that lesbians, gay men, bisexuals, transgender, Indigenous/Two-Spirit, and Queer people will find justice and new opportunities at CONFINTEA VI, and that the comprehensive policies, for example as called for at Point 18, will be achieved. CONFINTEA VI must build on the already-existing history that is moving in this direction. For example, in 2003, for the first time, activist adult educators challenged the reality of no space and place for sexual minorities during a meeting in Bangkok, Thailand held to conduct the mid-term evaluation of the CONFINTEA V agenda. At this meeting, the erasure of sexual minorities from CONFINTEA V was openly addressed on the floor of the UN during public discussions (Hill 2003). In preparation for the meeting, the ICAE's Gender and Education Office (GEO) conducted a virtual preparatory seminar entitled *Education for Inclusion Throughout Life*.³ The objectives of the seminar were to advocate for justice in gender relations, promote education for 'another possible world', and advance learning for non-discrimination and inclusion in different spaces and throughout life. In regard to the first objective, I have shown the need for guaranteeing the rights and dignity of lesbians, bisexual women and men, gay men, trans-identified people, and Queer people who, in most societies, are denied the kind of citizenship given to most heterosexuals; on a grand scale, sexual minorities are disqualified from democratic participation (Hill 2003). Gender role expectations (socially constructed notions of feminine and masculine ideals) are often rigidly enforced in societies. Individuals that transgress these are punished in various ways.

Regarding the second objective, education related to sexual orientation, gender identity, and human rights should be included in the design of education for another possible world. Finally, learning for non-discrimination and inclusion must take into account the fact that sexual minority people are systematically denied by many governments (and extra-governmental institutions) the right to life and work, the right to be free from harassment and degrading and inhuman treatment, the right to construct loving families, the right to pleasure and delight,

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the right to privacy, and the right to participate fully in civil society in ways equal to heterosexuals. It has to be a task of learning for non-discrimination and inclusion to transgress these debilitating realities.

Policy proposals in support of lesbians, bisexual women and men, gay men, trans-identified people, indigenous/two-spirit, and queer people

I propose that we who are preparing for, and attending, CONFINTEA VI strategise how to shape policies that:

- *Use civil and human rights education as anti-oppression tools*, and to build skills and capacity in human rights advocacy based on sexual orientation and gender identity;
- *Help facilitate education about sexual minority human rights* in all regions of the world;
- *Broaden the definition of discrimination to include sexual orientation and gender identity*. We must speak out against prejudice based on these personal characteristics, wherein governments, institutions, communities and individuals treat others wrongfully; such behaviour is unacceptable;
- *Call attention to sexual minority human rights violations* perpetrated by governments, religious institutions, legal and judicial institutions, extra-judicial groups, civil society, and individuals;
- *Facilitate national conversations and networks* to share materials, skills or experiences with each other to foster greater sexual minority presence, voice, and visibility;
- *Facilitate discussion on sexual-minority human rights* across government and civil society to help achieve some common understandings of justice;
- *Support the right of sexual minorities to be free from discrimination* at work, and the right to be free from social oppression in public and private spheres;
- *Support the right of sexual minorities to enjoy full citizenship*;
- *Support the right of sexual minorities to enjoy full immigration status*;
- *Support the right of sexual minorities to seek asylum from oppressive States* where their rights are denied;
- *Support the right of sexual minorities to be free from torture, arbitrary arrest, and extortion*;
- *Support the right of sexual minorities not to be classified as sick, criminal or sinful*;
- *Support the right to possess gay, lesbian, bisexual, Indigenous/Two-Spirit, transgender and Queer publications*, including educational, cultural, scientific, and research materials;
- *Support the right of youth to age-appropriate expressions of sexual orientation and gender identity, without fear.*⁴

The rationale upon which these policies will be built can be found, in part, in the *Charter of the United Nations* (1945), the *Universal Declaration of Human Rights* (1948), the *European Convention on Human Rights and Its Five Protocols* (1950, 1952, 1963, 1966), the *Vienna Declaration* (1993), the *International Covenant on Civil and Political Rights* (1996) and the *International Covenant on Economic, Social and Cultural Rights* (1996).

Conclusion

As the issue of articulating sexual minority rights at CONFINTEA V unfolds, a key document, essential to the conversation will be the *Yogyakarta Principles on the Application of International Human Rights Law in relation to Sexual Orientation and Gender Identity* (2006). The *Yogyakarta Principles* are 29 propositions that encompass the Universal Enjoyment of Human Rights, Non-Discrimination and Recognition before the Law, Rights to Human and Personal Security; Economic, Social and Cultural Rights; Rights to Expression, Opinion and Association; Freedom of Movement and Asylum, Rights of Participation in Cultural and Family Life, Rights of Human Rights Defenders, and the Rights of Redress and Accountability.

In 1997, at CONFINTEA V, Ms Esi Sutherland-Addy from Ghana, the Rapporteur-General of the Conference, in the Final Report, declared that there was a need to:

‘enhance, within a framework of partnership, international cooperation and solidarity. The key words are partnership...participation, mutual giving and taking and networking. International cooperation and solidarity should seek to develop human development programmes to enable adult learning throughout life within and across sectors; maximize opportunities for adult learning by integrating adult learning components into all programmes and projects; [and to] *increase capacity of all the non-traditional actors to participate actively in adult learning opportunities* [italics added]’ (CONFINTEA V, 1997).

The question remains whether CONFINTEA VI will fulfil this call, which was never heard for lesbians, gay men, bisexuals, transgender, Indigenous/Two-Spirit, and Queer people. This time, it is up to a new generation of adult educators, government actors, and activists to decide.

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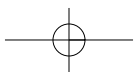
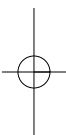
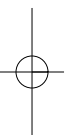
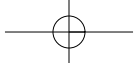
Notes

- ¹ It is important from the outset to provide some definitions. The following footnote is taken, in part, from Hill (2006). I use the term *sexual minority*, to explain that a subset (minority) of the human population experiences persistent discrimination, prejudice and violence (See Herek 2004) on a nearly global scale due to gender non-conformity. *Sexual orientation* refers to sexual and affectional desires. It is much more than about sex, however. A person's sexuality is concerned with feelings, emotions, spirituality, and ways of thinking and of being in the world – as well as the physical dimensions that are so often seen as the sole domain of human sexuality. *Gender identity* is the personal feelings regarding one's sense of self about being a man or a woman apart from one's body parts. How a person presents these feelings to the world is considered her or his *gender expression*. These terms open the discussion to the topics of *transgender* and *transsexuality*. *Transgender* is a term that describes gender identity. People may have an identity – that is, man, woman, or both, or neither – that does not correspond to their actual genetic makeup and anatomy. *Transsexuality* is a state of being transgender but one in which the person is taking action to affirm the felt self-identity. *Heterosexism* can be described as the attitude that all people are, or should be, heterosexual. It often is 'an ideological system that denies, denigrates, and stigmatises any non-heterosexual form of behaviour, relationship, or community' (Herek 1990, 316). *Homophobia* is the affective, irrational dislike of lesbians and gay men. Additional terms are *homo-hatred*, *homo-aversion*, and *homo-negativity*. *Two-Spirit* is a term used by some North American tribes where non-standard gender systems exist. Thus, in some aboriginal groups, men/boys are permitted to assume roles and behaviours typically restricted to women/girls, and vice versa. It is a contested term that a few scholars suggest may have been appropriated by white gay men to justify Western-style homosexuality and does not accurately reflect the complex gender systems of Native Americans (See Jacobs 1997, and Waller and McAllen-Walker 2001). Alternative gender systems are also found in indigenous groups outside of North America (e.g., the *fafafines* in Samoa, same-sex behaviour in pre-Christian Africa (Murray and Roscoe 2001), and in Islamic societies (Murray and Roscoe 1997). The term *Queer* elicits

passionate responses in many people. *Queer* is used in at least two distinct ways. One is as a means to avoid the cumbersome acronym LGBT, that is, as an umbrella term for the collection of sexual minorities. This usage of the word has value, including establishing an identifiable 'we' (or 'them') that generates political and personal identity. Another use of *Queer* suggests that identities are always multiple, fluid, mobile, contingent, unstable (labile), and fragmented. It challenges fixed notions such as gay, lesbian, and straight. *Queer* in this formation 'attempts to transform an epithet into a label of pride and militance [sic]. . . . Use of the word is . . . debated within the gay community. Some argue that it reflects the internalisation of homophobic attitudes, while others argue that it signifies defiance of straight culture' (Rosenblum and Travis 2003, 7). The term destabilises and contests the meaning of 'normal' regardless of sexual orientation or gender identity.

- ² Several exceptions must be noted, such as the March 2008 declaration made by the European Union and a significant group of ten Mercosur and Associated countries in favour of ending discrimination and violence based on sexual orientation and gender identity (See: http://www.ilga.org/news_results.asp?LanguageID=1&FileCategory=44&ZoneID=7&FileID=1160)
- ³ This virtual preparatory seminar can be found at <http://www.icae.org.uy/eng/geoseminar.html>
- ⁴ In internet discussions on the International Council for Adult Education listserv, this proposition was very controversial, and extremely misunderstood by some. *I want to be very clear and unambiguous: it is not meant to signal, endorse or condone exploitation, sexual abuse, victimisation, or sexual activity by or with children or youth. There is no question that children and youth must be protected from predatory and unscrupulous adults.* The point, 'to support the right of youth to age-appropriate expressions of sexual orientation and gender identity, without fear' is meant to open the discussion that children and youth *are* sexual and gendered beings, and that *sexual and gender development are a natural and healthy process from birth* that lead people to become balanced, well-adjusted homosexual, heterosexual, bisexual or transgender individuals. Childhood is an important life stage where individuals establish a sense of self, identity, and where they form attachments to others that extend into adulthood. On 10 January 2008, one listserv participant (self-identified as a feminist heterosexual woman who has been married for 35 years, mother of two heterosexual men, and teacher of

youth, educators and other adults) stated it quite clearly: this point is to be understood to indicate that most of the problems about sexuality and gender arise during childhood, and are caused by repression and promulgation of heterosexual points of view. Most of the violence and disrespect of rights of people about alternative sexualities begin during childhood at home, in religious institutions, and in schools. She also emphasised that this point, to support the right of youth to age-appropriate expressions of sexual orientation and gender identity, without fear, *must not be read* as support for the unjust and oppressive sexual pressures that come from marketing and media today.



Cecilia Soriano

ADULT LITERACY CHALLENGE: THE 7 Ms

Abstract

Beyond 3Rs to learning within political action to functional literacy to life skills, the discourse on adult literacy has primarily been defined by civil society organizations. This article presents thoughts on adult literacy programs coming from educators and advocates and the underlying dilemmas of autonomy and collaboration with government for adult literacy. Faced with growing illiteracy among adults and adolescents, civil society has been arguing for more government investments to strategic, relevant and sustained adult literacy programs. What and how policy advocacy will work for adult literacy and how to urge CONFINTEA VI to respond to these calls are key to the discussions that this paper hopes to generate.

DESAFÍO DE LA ALFABETIZACIÓN DE PERSONAS ADULTAS: LOS 7 Ms

Resumen

Más allá de las 3Rs para el aprendizaje dentro de la acción política para la alfabetización funcional para las habilidades de la vida cotidiana, el discurso sobre la alfabetización de

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personas adultas ha sido definido primeramente por organizaciones de la sociedad civil. Este artículo presenta reflexiones sobre programas de alfabetización de personas adultas provenientes de educadores y defensores de los derechos, así como los dilemas subyacentes de la autonomía y la cooperación con el gobierno para la alfabetización de personas adultas. Enfrentados al crecimiento del analfabetismo entre personas adultas y adolescentes, la sociedad civil ha estado argumentando a favor de más inversiones gubernamentales para programas estratégicos, pertinentes y sostenibles de alfabetización de personas adultas. Qué y cómo funcionará la defensa de las políticas a favor de la alfabetización de personas adultas y cómo exhortar a la CONFINTEA VI para que responda a estos llamados son clave para las discusiones que este trabajo espera generar.

LE DÉFI QUE POSE L'ALPHABÉTISATION DES ADULTES

Résumé

De l'apprentissage de la lecture, de l'écriture et du calcul à l'apprentissage par l'action politique, l'alphabétisation fonctionnelle et l'acquisition de compétences pour la vie, le débat sur l'alphabétisation des adultes a principalement été déterminé par des organisations de la société civile. Cet article se penche sur des programmes d'alphabétisation des adultes et présente à leur sujet des réflexions de leurs défenseurs et d'éducateurs. Il expose aussi les problèmes sous-jacents que posent l'autonomie et la collaboration avec le gouvernement en ce qui concerne l'alphabétisation des adultes. Face à un analphabétisme croissant au sein des populations adultes et adolescentes, la société civile a demandé davantage d'investissements publics pour mettre en œuvre des programmes d'alphabétisation stratégiques, pertinents et durables. Qu'apportera une politique de défense de l'alphabétisation des adultes et comment fonctionnera-t-elle ? En outre, comment exhorter les participants à la CONFINTEA VI à répondre à ces appels ? Tels sont les points essentiels du débat que cet article espère lancer.

Adult literacy challenge

The Education for All (EFA) *Global Monitoring Report* 2007 estimates that globally, there are 771 million adult illiterates and halving this number by 2015 – EFA Goal #4 – is reportedly the most neglected EFA target. Women are less literate than men: worldwide, only 88 adult women are considered literate for every 100 adult men, with much lower numbers in low-income countries. Independent civil society assessments such as the Education Watch literacy mapping exercise of ASPBAE reveal that even these scandalously huge numbers understate the full extent of the adult literacy deficit worldwide.

States recognize adult literacy as a turn-key strategy to generate income, combat HIV-AIDs, lower maternal mortality and keep children and youth (15

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years and above) performing better in schools. However, investments for non-formal education, where adult literacy is located, remain at a meagre 1% of the total budget for basic education and of poor quality. Further, while many constitutions guarantee the right to free and compulsory primary education, absent are similar policies that ensure at least four years of literacy interventions for adults who missed out on primary education.

To reach EFA Goal #4, decisive actions until 2015 need to be taken in 12 countries in sub-Saharan Africa, South and West Asia, South East Asia and the Pacific. To determine the magnitude of literacy deficit in each country, understand impediments to acquiring needed literacy and to map out adult literacy needs, the States need to do a tracking of illiterates. In most EFA meetings, while countries were able to estimate literacy rates, they expressed difficulty in adequately reaching out to adult illiterates because of lack of data, constant mobility of adults and the inability – in terms of resources and competencies of national and local governments to do community-based literacy assessment and mapping.

Globally, the average literacy rate has improved, mainly due to the proactive adult literacy interventions of China, but the number of illiterates is expected to increase as more and more youth join the fold of adult illiterates. Youth illiterates are both out-of-school and those who have finished a certain level of schooling. ASPBAE's Education Watch in Papua New Guinea revealed 'a crisis in quality of schools' where only 19% of those who complete primary school are literate and only 23% of those who complete secondary school are literate. This concern among the youth has been raised in some countries in Africa (thus the call for both access and quality), South Asia and South East Asia.

The emerging contexts of migration, knowledge-based society, globalization and the need to understand an international language, renewal of ethnic identities and other events that require fast, accurate and text-based information, make imperative continuing adult literacy interventions. Otherwise, adults, especially women in vulnerable sectors will remain at the margins of, and even totally excluded from, development and democracy.

Quality of adult literacy

The diverse adult literacy strategies and innovations make it impossible to standardise policies to define what constitutes a quality programme. There is at the same time an aversion towards standardisation and one-size fit all approach to adult literacy. The GCE instead came out with a set of 12 benchmarks that serve as guide posts for effective adult literacy programmes. Building on these benchmarks and to approach adult literacy as a 'system' or systems comparable

to school systems, implementing and enabling policies for adult literacy may be scrutinised around 7 Ms.¹

1. MISSION This refers to an articulation of the framework and goals of adult literacy translated into clear policy framework and measures of success.

A review of a State's articulation of what constitutes adult literacy defines the boundaries by which it will be addressed by governments. Most States define literacy as basically the ability to read and write. The definition is fairly straightforward but governments agree that the route to acquiring literacy, especially among adults, necessitates going beyond traditional letter recognition and/or phonetics. Countries recognise the imperative to link literacy programmes to life skills, which makes EFA Goals 3 and 4 inextricably linked.

However, in the 18 measures of success of EFA goals only one refers to adult literacy and this indicator has been limited to literacy rate defined as reading and writing, which manifests the limited target of countries.

Civil Society Organisations like non-government organisations, self-help organisations, corporate foundations and other non-State implementers have defined adult literacy as the ability to use literacy skills to enable a person to be economically productive and exercise his/her right to participate meaningfully in the political life of a community. Many innovations have combined literacy with enterprise development, livelihood skills, women's rights, sustainable agriculture, legal rights, environment and other themes relevant to people's lives. The breadth and depth of these interventions, however, awaits the articulation of adult basic learning needs and necessary measures of success.

2. MARGINALISED LEARNERS Who are the learners? What are their needs? Most illiterates have been marginalised because of three factors.

1. poverty: the inability to spend for their education and the opportunity costs of studying
2. language: the adequacy in speaking and listening in mother tongue but the inadequacy in communicating in a regional, national or international language
3. remoteness: thus difficulty in accessing education.

Country policies need to make a clear investment and put in place strategies to reach out to these marginalised adults. Targeting relevant programmes necessitate the integration of literacy skills into specific needs and vice-versa.

Diagnostics of cognitive needs of marginalised learners is but a part of defining learning needs. Understanding these needs in the context of language, cultural norms and culture as a whole facilitates grounded policies for adult literacy interventions. For example, women who have since birth been moulded

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in a power arrangement where men dominate, may need more than a six-month programme of rights awareness to fully develop capacities for reading-writing, accessing-analysing information and creating informed decisions.

Similarly, programmes that enable women to acquire literacy skills and livelihood skills through mother tongue may eventually shift to learning a regional language that is most often use in markets and town.

3. MATERIALS and METHODS What are the specific contents of adult literacy programmes? What curricula, lesson plans and learning materials need to be developed towards achieving what literacy competencies?

Many governments and even NGOs have implemented reading-writing-numeracy literacy programmes in the hope that after six months, adults are able to use these skills in a subsequent livelihood project. In literacy programmes in East Timor, for example, women were able to successfully handle the livelihood programme, e.g. goat-raising, but surprisingly did not acquire the targeted literacy skills. Apparently, the women managed the livelihood project aided by their own literacy. It is important to note that improving livelihood or other life skills may not necessarily be mediated by symbols/scripts. Speaking and listening are also essential literacy skills through which new information may be learned, analysed and put into action.

Keeping in mind that oral transfer of knowledge is the traditional way of imparting knowledge, how can a programme's curricula build on people's existing literacy skills towards transitioning to reading and writing skills?

Defining curriculum and levels of competencies is not only to facilitate better handling of adult literacy programmes but is necessary to encourage governments to enact policies that define bolder, concrete and achievable literacy competencies based on people's needs. This step is essential in the oft-repeated advocacy to have literacy/learning systems of indigenous peoples recognised, funded and translated into quality programmes by governments.

What are the principles and processes for learning in effective adult literacy programmes? The GCE reiterated that there are no magic lines to cross from illiteracy to literacy and that learning is a continuous process. Therefore there is a need for governments to invest in literacy environments, which could be in non-formal and informal settings such as community learning centres, mobile libraries and media-based learning materials. While governments have reiterated the importance of informal learning, they have failed to institute adequate materials of value for adult literacy through TV, radio and other informal processes.

4. MENTORS Recognising the difficult circumstances by which adults have been historically denied access to education, mentors need to have capacities for facilitating learning, a grasp of subject matter and core competencies in organising and motivating adult learning groups in a sustained manner. Certified teachers that have been university-trained need to acquire units in social work and/or community development. At the same time, there should be a system of accrediting the competencies of community educators with no formal training. Government should provide pathways to build on and enrich the competencies of community educators.

In an inter-agency provision of adult literacy (e.g. health literacy that may involve CSO, Ministry of Health, Ministry of Social Welfare, etc.) staff of extension offices of government agencies need to be equipped with capacities for doing literacy work.

Most mentors work on a voluntary basis and thus are not given enough compensation for their dedication. Governments should aspire to provide at least minimum wages to mentors from both government and non-government adult literacy workers.

5. MEASURES Official literacy rates are based on self-reported literacy assessment that often are not sound bases for crafting adult literacy interventions.² There has to be a move for countries to adopt better and actual literacy testing to get reliable data on literacy gaps and needs.

There had been several discussions on the literacy outcomes but benchmarks on processes for linking reading-writing to knowledge acquisition are issues that remain to be developed. What are alternative ways of monitoring and measuring adult literacy beyond paper and pencil tests of reading and writing skills? Given the diverse and emerging contexts for learning, there had been suggestions to shift to evaluation portfolio that consists of materials done by participants to prove acquisition of a set of basic learning competencies.

While there are governments open to evaluation portfolio, the practicality of setting standards and tests for comparability of literacy outcomes across learners from different geographic areas is deemed difficult and expensive. At the same time, the capacities of educators or literacy facilitators to use evaluation portfolio aided have yet to be developed. Ensuring literacy assessment policies along the Delors' four pillars of learning is a possible area for partnership between the government, academe and non-government organisation implementers.

Financing and Governance

6. MONEY What resources do governments need to put in place for effective adult literacy programmes? While the framework is to provide literacy beyond reading and writing, government resources for literacy are limited to traditional literacy programmes. Literacy with its myriad components finds little support in parliament and executive departments because of what they perceive as elusive or unmeasured learning outcomes especially in adults.

Adult literacy programmes tend to be periodic, often implemented within a six-month cycle that for some, is later complemented by livelihood projects. One-shot adult literacy projects need to be replaced by sustained and strategic, sector-wide literacy programmes. This will require investments for financing implementation of long-term adult literacy programmes accompanied by documentation of local wisdom, development of materials, assessment measures, building educator capacities, creating structures and management systems.

There has to be a campaign addressed to parliaments to enable policies that will ensure resources for strategic adult literacy programmes complete with institutionalised mechanisms and structures.

Government should primarily be responsible for ensuring adult literacy programmes for all. National government should take the lead while working with local governments. The current trend where national governments concentrate on the school system while passing on the bulk of non-formal education, and therefore adult literacy programmes to local governments creates inequitable funding to the detriment of poor, marginalised people who mostly live in poor-resourced local governments.

7. MANAGEMENT AND MONITORING In a regional workshop on adult literacy organized by ASPBAE in November 2007, NGOs are found to be working independently of government and have failed to present their achievements to government as contributions to EFA. One recommendation in the workshop is to balance between autonomy, recognition and collaboration. There has to be framework for coordination and when possible, a collaborative framework for working between government and non-government adult literacy providers.

Civil society groups need not be confined to service provision – implementing and managing their own literacy programmes. They need to engage national and local governments in formulating, implementing and monitoring policies to push for the eradication of adult illiteracy. To ensure that policies are sustained beyond the term of incumbent government officials, structures and mechanisms for continuing adult literacy should be made

functional (where there are present structures) and/or organised at different levels.

Cecilia V. Soriano is the National Coordinator of the Civil Society Network for Education Reforms. The coalition more popularly known as E-Net Philippines is the Co-Chair of the National Education for All Committee in the Philippines. Cecilia has been a popular educator since 1987.

Notes

- ¹ The 7Ms framework was an instrument that came out in one of the sessions of E-Net Philippines' (Dis)Courses in Alternative Learning System. It is an attempt at systematically documenting and/or analysing civil society's community education into a 'system/s' of learning. The effort was borne out of a government's critique that noted the lack of harmonisation in CSO's education work in the Philippines.
- ² Using actual literacy tests, ASPBAE's Education Watch in Solomon Islands, Papua New Guinea and Indonesia (with E-Net for Justice Indonesia) revealed literacy rates in these countries that are lower than official figures (based on self-reporting census).

Sergio Haddad

COMMENTS FROM A LATIN AMERICAN PERSPECTIVE

Abstract

As a comment of the paper Adult Literacy presented by Cecilia Soriano during the ICAE Virtual Seminar in Preparation for CONFINTEA VI, that took place from April 21st to May 09th, this paper recaptures the debate of the programmes to teach literacy to adults with characteristics of campaign; it talks about a new type of exclusion that contributes to increase the number of “functional illiterate” people; also discourse about necessity to recognize the historical subjects that make up literacy classes in their conditions of people who demand rights and, to conclude, it discuss about the role of the state and the civil society as authorities on the schooling processes to demand institutionality and universality.

COMENTARIOS DESDE UNA PERSPECTIVA LATINOAMERICANA

Resumen

Como comentario del trabajo Alfabetización de personas adultas presentado por Cecilia Soriano durante el Seminario Virtual del ICAE en preparación de la CONFINTEA VI que

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tuvo lugar entre el 21 de abril y el 9 de mayo, este artículo retoma el debate de los programas de alfabetización de personas adultas con características de campaña; habla acerca de una nueva forma de exclusión que contribuye a aumentar la cantidad de “analfabetos funcionales”; también trata acerca de la necesidad de reconocer los temas históricos que componen las clases de alfabetización en sus condiciones de personas que demandan derechos y, para concluir, discute el papel del estado y de la sociedad civil en tanto autoridades en el proceso de escolarización para demandar institucionalidad y universalidad.

COMMENTAIRES SUR LE TRAVAIL DE CECILIA SORIANO

Résumé

Cet article commente le travail intitulé Adult Literacy (alphabétisation des adultes), présenté par Cecilia Soriano lors du séminaire virtuel du CIEA, organisé du 21 avril au 9 mai en vue de la CONFINTEA. Il reprend le débat sur les programmes d'alphabétisation des adultes ayant des traits de campagnes. Il se penche sur un nouveau type d'exclusion contribuant à accroître le nombre d'« analphabètes fonctionnels ». Il aborde aussi la nécessité de reconnaître les sujets historiques constituant les cours d'alphabétisation, qui donnent aux apprenants les moyens de faire valoir leurs droits et conclut sur le rôle que peuvent jouer l'État et la société civile pour donner à la scolarité un caractère institutionnel et universel.

The text presented by Cecilia Soriano and ASPBAE is rather complete and very good, being easy to understand for the Latin American reality. In the diagnosis part, many Latin American countries can be included, such as Brazil, together with those of Sub-Saharan Africa or Asia. However, as a general comment, the text works making reference to EFA goals when it could also work, mainly, in dialogue with the Hamburg Declaration (<http://www.icae.org.uy/eng/icaeconfintheasemhambdecla.html>) and the Agenda for the Future (<http://www.icae.org.uy/eng/icaeconfintheasemagendaforfuture.html>)

Some comments

There still exist, in many countries, programmes to teach literacy to adults with characteristics of campaign, even when this method has already been criticised for its inefficiency. These programmes, designed to work for some months, shortened, with facilitators who lack the necessary training, many of whom are volunteers with low incomes, working in inappropriate facilities, with training unique materials that do not take into account the diversity of the learners, have not realised they have to fulfill the task of increasing the training capacity of young people and adults. We should avoid referring naturally to the vision of

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literacy as restricted, switched off from basic education, from 'traditional' six-month literacy programs. I believe we have to be affirmative, to have a broader vision of literacy, switched to basic education and to what the text names 'education for life'.

In some Latin American countries we are registering a new phenomenon, a new type of exclusion. In the last decades a great effort was made to extend the access to children and young people into regular systems of education, as a result of the pressure to democratise educational opportunities, mainly after periods of military dictatorship. This phenomenon appears in times of neoliberal policies that produce this wide offer without an increase of adequate resources. Thus, the number of students by class increased, the amount of frequency hours diminished, and the number of shifts went up; teachers lost purchasing power, material and pedagogical conditions in schools became precarious. All these factors contributed for the school to receive more students, but having a strong impact in educational quality offered. As a consequence, at present, children go to school but they do not learn. This is a new kind of exclusion; it is no longer that access is denied but that educational services offered are precarious. What is offered is a poor school for poor people. This will have an impact over literacy rates of young and adult people, as we should no longer consider only those people who never went to school but also those who did go but didn't learn, even after four, six, eight years of schooling. In conclusion, if a wider offer of regular education has helped to diminish 'absolute illiteracy' rates, we have to emphasise that the number of 'functionally illiterate' people increases.

The comment in point 2 about who these students of adult literacy programmes are is very important. It is necessary to recognise the historical subjects that make up literacy classes in their conditions of people who demand rights, as before being bearers of shattered school paths these people have perverse paths of social exclusion, they live paths of denial of basic human rights to life, to feeding, to housing, to work. But to continue, besides shortages, whether material or of symbolic assets like in the case of education, it is necessary to recognise as well that these literacy subjects are men and women who have a role within the society they live in, full of different paths of conquests and failures, that make up the historical subjects they are.

Thus, to recognise this active characteristic of the subjects is to recognise that beyond the path of shortage there is a path of conquest and fight that is part of everyday life of popular sectors that determine the historical reasons for the building of the societies they live in. Even if most of the students belong to the poorer sectors of the population, there are other factors, apart from the socio-economic ones, that contribute to diversify or to take into account certain characteristics of literacy courses' students: their gender, ethnics, if the school is urban or rural, if the student has any handicap, and so many other

characteristics that make the human being to be recognised as such in his composition of diversities. And there is also the history of each person or each group within the context of social struggles, their forms of organisation and the defence of groups on interest. A new vision of the literacy subject has, as an explanation, a new form of consideration, where the effective participation of learners is a basic principle of schooling processes, curricula, school organisation, granting that school models are produced and reproduce as a result of this participative action.

Another important topic addressed in the debate on administration, in point 7, is the one about the role of the State and civil society groups. Schooling processes demand institutionality and universality. Only the State is in a position to offer these conditions with quality to everyone. However, in some circumstances, civil society groups can play a very important role. These circumstances can happen due to the proximity of certain entities of civil society and social movements to learners. This proximity is a facilitating element for men and women – who traditionally have a history of difficulties or of lack of familiarity with literacy centres – to get closer and participate in literacy programmes.

Under these circumstances, the literacy offer presented by these entities can be a strong factor of encouragement for participants. At the same time, programmes offered by social movements or entities that strongly identify with certain social groups, or that are even made up of people coming from the same cultural universe of learners, have strong reasons to keep such programmes as part of their struggle for acknowledgement, preservation and for their diversity to be valued. Indigenous schools, rural movements, afro groups ('quilombolas'), urban social movements, among others, are some examples of this kind of educational practice. It is also the civil society that has to control and monitor in order that governmental sectors assume their responsibilities. Regarding point 7, when it refers to financing, I would also like to mention the importance of the role of international cooperation that should contribute with the poorest governments in this task of implementing the human right to schooling.

Sergio Haddad is a Brazilian economist and accredited teacher; MS and Ph.D. in History and Sociology of Education (University of São Paulo). He is General Coordinator of Ação Educativa (a non-profit organisation in São Paulo), President Director of Brazil Foundation for Human Rights, and a member of the board of the International Council for Adult Education. He is also member of the National Commission for Youngsters and Adult Education of the Education Ministry of Brazil.

Malini Ghose

GENDER, LITERACY AND WOMEN'S EMPOWERMENT IN INDIA: SOME ISSUES

Abstract

The note discusses some key issues pertaining to gender, literacy and women's empowerment in India. It uses disaggregated data to illustrate the persisting gender disparities with regard to literacy and points out that despite this there is a lack of real political will to address issues of adult literacy. It further draws on data from the micro-credit sector – micro-credit being an important strategy for women's empowerment and poverty alleviation – to show how literacy continues to be a determinant in women's access to leadership opportunities, resources and learning inputs. The article points out that the discourse on gender and literacy is predominantly around issues of access and not as it should be about changing gender relations or looking at gender within areas such as programme design, training, materials etc. The article also underscores the fact that sustaining literacy by creating a robust literacy environment is of critical importance. Drawing on the above the article makes some recommendations. It is based on the on-going work of Nirantar, a resource centre for gender and education, in India.

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GÉNERO, ALFABETIZACIÓN Y EMPODERAMIENTO DE LAS MUJERES EN LA INDIA: ALGUNAS PUNTUALIZACIONES

Resumen

La nota discute algunos temas clave pertenecientes al género, la alfabetización y el empoderamiento de las mujeres en la India. Utiliza datos desagregados para ilustrar las persistentes disparidades de género con respecto a la alfabetización y señala que, a pesar de esto, hay una falta de voluntad política real para abordar temas de alfabetización de personas adultas. Utiliza también datos del sector del microcrédito (el microcrédito es una estrategia importante para el empoderamiento de las mujeres y la disminución de la pobreza) para mostrar cómo la alfabetización continúa siendo determinante en el acceso de las mujeres a oportunidades de liderazgo, recursos y aprendizaje. El artículo indica que el discurso sobre género y alfabetización gira predominantemente en torno a cuestiones de acceso y no como debería ser, en cuanto a cambiar las relaciones de género o ver el género dentro de áreas como diseño de programas, formación, materiales, etc. También subraya que es de vital importancia mantener la alfabetización mediante la creación de un entorno de alfabetización robusto. Sobre esta base, el artículo realiza algunas recomendaciones. Se apoya en el trabajo actual de Nirantar, un centro de recursos para el género y la educación en la India.

GENRE, ALPHABÉTISATION ET AUTONOMISATION DES FEMMES EN INDE

Résumé

Ce texte se penche sur un certain nombre de sujets clés en rapport avec la question du genre, de l'alphabétisation et de l'autonomisation des femmes en Inde. Il a recours à des données désagrégées pour illustrer les disparités persistantes entre les sexes en ce qui concerne l'alphabétisation et indique que malgré cela, il n'y a pas de volonté politique réelle d'aborder des questions relatives à l'alphabétisation des adultes. Il se base en outre sur des données issues du secteur des microcrédits (ces derniers constituant une importante stratégie pour l'autonomisation des femmes et la réduction de la pauvreté) et montre comment l'alphabétisation reste un facteur déterminant en ce qui concerne l'accès des femmes au leadership, aux ressources et à l'éducation. Cet article fait remarquer que le débat concernant le genre et l'alphabétisation s'articule principalement sur des questions d'accès et non, comme il conviendrait, sur les mutations des rapports entre les sexes. Il observe en outre que ce débat n'aborde pas non plus la dimension du genre dans des domaines comme la conception de programmes, la formation, les matériels, etc. Il souligne aussi le fait que soutenir l'alphabétisation en créant un environnement alphabétisant solide est éminemment important. En s'appuyant sur tout cela, l'article fait un certain nombre de recommandations. Il repose sur les activités menées par Nirantar, un centre de documentation sur la question du genre et l'éducation, situé en Inde.

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Consider the following figures, according to the 2001 Census of India:

- Literacy rates have gone up from 52.1% in 1991 to 65.4% in 2001 (for the 7+ age group).
- Female literacy rates have increased faster (14.9%) than male literacy rates (11.9%) during the past decade.
- For the first time the absolute numbers of non-literate people have declined, from 328 million to 304 million.
- Between 1991 and 2001 the female literacy rate for Schedule Castes has increased by 18% and by 16.57% for Schedule Tribes.

Consider also:

- The gender gap continues to be more than 20%, with the male literacy rate at 75.26% and female literacy rate at 53.67%.
- The literacy rates for Schedule Castes or Dalits (54.69%) and Tribes (47.10%) are below the national average and the gender gap is significant at about 24%.
- The literacy rate for Muslims at 59.1% is also below the national average and lowest among all religious communities and with a gender gap of 17.5%.
- Nearly 189 million illiterate women constituting 64% of India's population still need to be reached.
- 42.8% of the districts in India have a literacy rate lower than 50% and most of them are concentrated in nine States.
- The apparent survival rate at the primary level (Grade 5) is 67.15% and upper primary (Grade 8) is 28.46%. (*Source: NIEPA, Elementary Education in India 2004–05*)

The figures show that while progress has been made on a number of fronts with regard to gender and literacy a lot still needs to be done. The challenges lie in reaching a large number of women, especially from socially-economically marginalised groups and in closing the gender gap.

So what are some of the issues that come in way of addressing these challenges?

Lack of political will

Unfortunately, in India today there is a lack of political will in actually addressing the challenges of adult women's literacy. Despite gender sensitive policy documents and the unprecedented mobilisation of women during the literacy campaigns of the 90s, literacy has all but fallen off the development agenda. Often adult and elementary education are posited as competing

constituencies, which is not useful. The needs of adults and young adults for literacy are very different from children and fulfil different goals. Significant efforts in school education notwithstanding, dropout rates continue to be high. Young adults, mostly women are continuously entering the pool of non-literates. Adults need literacy and learning opportunities to access information, to exercise their rights and to make democracy work and several other reasons. The importance of adult women's literacy in meeting development goals such as improved school participation, maternal mortality rates and nutritional standards is well known. Besides these instrumental benefits, the value and importance of women's literacy as a right in and of itself and in enabling women's empowerment and gender justice, goals to which the government is also committed, still needs to be urgently established in real terms.

Women's groups have been trying to highlight and bring back the issue of literacy into the agenda of the education sector by intervening in national and international policy level arenas. For example, a people collective of Economic, Social and Cultural Rights recently (April 2008) submitted a report entitled *Divided destinies, unequal lives: Economic, social and cultural rights and the Indian state* to the UN Committee on ESCR highlighted the following.

The literacy rate for women shows significant improvement between 1991 and 2001. But despite the gains, disparities in terms of gender, social categories (SCs/STs), rural/urban location, continue to be glaring. The literacy and continuing education programmes that are described in the GOI report are largely on paper. Large-scale relapse into illiteracy is also reported. There is no data on literacy retention rates. It is very likely that India will not be able to meet the Education for All (EFA) and MDGs pertaining to literacy (as pointed out in the UNESCO Global Monitoring Report 2006). The allocation for adult literacy is a mere 0.02% of the education budget. This is the only large-scale non-formal education programme for poor, rural and marginalised women but receives very little priority. The present lacklustre situation means that critical literacy inputs that are required to sustain processes empowerment of women's collectives, including self-help groups are not being provided thus denying women from marginalised communities access to leadership opportunities and credit.

Government policy documents regularly reaffirm its commitment to adult women's education but the reality on the ground as well as the resource allocation belies this. What steps are the National Literacy Mission and the State Literacy Missions taking to systematically track women's retention of literacy? What are the proposed budget allocations for adult literacy and continuing education? Moreover, what substantive plans (backed by programmes and resources) does the government have for reviving the Continuing Education Programme, such that it takes into cognisance the needs

and lived realities of women and in ensuring that it reaches committed Education For All Goals for adult literacy?

While the need for convergence is regularly mentioned in government policy documents this does not get translated at the programme and implementation level. What concrete steps does the government have to dovetail literacy and capacity-building within micro-credit and empowerment programmes? Which Ministry will be responsible and accountable for implanting and monitoring this?

Similar concerns were raised in the shadow report prepared by women's organisations and presented to the CEDAW Committee in January 2007. The CEDAW committee took note of some of these issues and made recommendations in its concluding comments as well.

...The Committee calls upon the State party to strengthen its efforts, at the national, state and union territory levels, to close the gap in literacy rates between men and women, establish benchmarks in this regard and create mechanisms to monitor the achievement of such benchmarks. It also urges the State party to provide, in its next periodic report, information on the budgetary allocation to adult education programmes and the impact, and trends over time, of such programmes. Moreover, it calls upon the State party to meet its commitment of allocating 6 per cent of its gross domestic product to education in its eleventh five-year plan... (From the Concluding Comments CEDAW Committee, point 33)

No connections between literacy and women's empowerment programmes

For example, though the need for convergence is mentioned in policy documents there are hardly any connections between different programmes in practice. Take the case of micro credit or self-help group (SHG) programmes, which is the main intervention to meet the objectives of women's empowerment and poverty alleviation in India today. According to estimates, there are nearly seven million self-help groups in the country, of which more than 90% are comprised only of women.

A recent survey conducted by Nirantar¹, of 2,750 SHGs formed under both Government and NGO programmes across 16 states, threw up some telling data. For example:

- 61% of SHG members surveyed were non-literate; this included those 28% who could only sign.
- 69% of the women who were in leadership roles were literate, making literacy a critical determinant of which women get to play leadership roles.
- For 65% of groups, it was the literate group leaders who had participated in most of the training offered.
- The group leaders availed of 46% of the large loans, although leaders are only 13% of the total numbers of members in the groups.
- Out of 45 NGOs who participated in the study only three had undertaken concrete efforts to provide literacy skills to SHG members.
- 47% groups formed under government programmes had not received any kind of capacity building input for the last two years. Only 6% of groups formed under government programmes had received inputs on gender issues.

Looking beyond figures, here is what women members of self-help or micro credit groups had to say about literacy.

When we go to meet forest officers, we are not able to give our demands in writing. We have worked a lot to empower ourselves but still we are dependent on others to write our demands. (SHG member, Gujarat)

We have faith in the accountant and bookkeeper. But if the accountant is doing something incorrect, we can't say anything. (SHG member, Andhra Pradesh)

The connections between literacy, transparency, autonomy and self-confidence are evident in these statements. The findings show that literacy enables access to leadership, which in turn leads to access to other opportunities, such as credit and capacity building. It also points out that literacy is a critical ingredient in ensuring and sustaining women's empowerment. Despite this strong evidence, promoters of such programmes, government and NGOs and donors, are not making the linkages and investing in literacy programmes.

If women need literacy they will use it and literacy skills will become sustainable. Besides micro credit groups there is documentation to show that women members of federations and *panchayat* (institutions of local self-governance) members, having moved into the public domain, come forward to demand literacy. But they have specific expectations from literacy programmes. In general, the de-contextualised literacy programmes have proven to be ineffective. Moreover, women are not a homogenous category. The gender disaggregated literacy data shows that the literacy rate is significantly worse for socially and economically disadvantaged groups. There are significant rural,

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urban and regional differences as well. These distinctions and needs of different groups are not taken care of when planning strategies.

Looking at gender beyond access

As participants of most adult literacy programmes are predominantly women, this is often taken to mean that gender concerns are automatically being addressed, which is not the case. Gender is about addressing unequal relations and should inform every aspect – planning, training, evaluation, programme design, etc – it is not only about reaching women. For example, just building a community learning centre will not ensure that women go there. For a programme to be gender sensitive it is important to take into consideration the social relations within which women's lives are embedded. For a woman to leave her home and come to a literacy class or the continuing education centre requires negotiations at different levels. Her husband, other family members and sometimes even her children must give her 'permission' to attend. She has to convince the community at large that literacy will be beneficial and will not 'spoil' her or make her 'too bold'. She cannot do this alone. Interventions that do not include such support as part of the programme usually do not work. Trust takes a long time to build and most literacy programmes are short-term programmes, and thus not effective. Similarly, a training programme with a couple of sessions devoted to gender does not do the job.

Sustaining literacy

What do learners read once they complete a literacy programme?

The 2006 National Readership Survey in India had this to say:

- *359 million literate people have nothing to read*
- *Affordability is not the main constraint*
- *81% rural readers have no access to newspapers.*

Newly literate people, rural communities, women and other marginalised groups are completely outside the information loop. Several factors limit the access of newly-literate readers, to reading material. Villages, where a majority of such readers live usually fall in the media dark regions. Poor, rural communities are not profitable markets; hence investments in distribution networks are not made. Issues of language and content are also critical in determining readership. Mainstream newspapers and magazines are in the official language and written in a formal style. The content assumes a level of information that readers with low levels of formal education may not have.

If mainstream media is inappropriate, specialised publications for newly literates also have limitations. They are didactic, message oriented and invariably represent women and other marginalised communities in negative and stereotypical ways. Material aimed at women tends to be limited to topics like hygiene, nutrition, reproductive health, problems of early marriage etc. While such topics are important the treatment in material does not in fact encourage critical thinking or an analysis of the causes behind why their present situation exists. Moreover, people read not only to get information but for pleasure and entertainment as well. These are invariably lacking in most material developed for newly literates.

Not having regular access to reading material has serious consequences. Newly literate populations quickly relapse into illiteracy. It means no access to information, inability to participate in public debates and a lack of awareness of one's rights. In the absence of a literate environment the investments made in making people literate is as good as providing water in leaking glasses.

Some recommendations

Demonstrable political commitment to adult literacy, including significant increase in allocations to meet the vast and diverse needs of adult women's literacy and long-term learning.

Today in India and the region the most important and widespread interventions for women's empowerment is micro credit or self-help group programmes. To realise the objectives of such programmes, substantive literacy and capacity-building inputs should be ensured and appropriate programmes developed and all promoters of such programmes across different ministries should be responsible for implementing them. An inter-ministerial monitoring mechanism should be constituted.

A mapping of literacy and learning needs different groups of women and development of different issue-based contextualised programmes developed, including the establishment of a flexible and accessible equivalency programme with an established delivery mechanism at district levels.

Promotion of the production of a range of reading material by different agencies including supporting efforts for locally-developed material. Policy directives and investments to ensure distribution mechanisms.

Mechanisms to gather reliable data on retention, relapse and use of literacy should be put in place. At present the quality of literacy data is unreliable and does not mirror the complex ground level realities. Just knowing whether a woman is literate or not is not useful for planners and programme designers.

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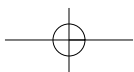
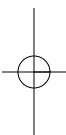
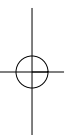
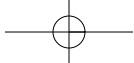
There is no data on retention and relapse. In the case of elementary education, data on retention and dropouts has been crucial in providing direction to realigning and designing policies and programmes.

Investing in innovative programmes and approaches and drawing lessons for adaptation and expansion is one of the critical needs, and regional sharing. Here too we need to be creative.

Malini Ghose is a founder-member and trustee of Nirantar, a resource centre for gender and education in New Delhi, India. She has worked in the field of education, women's rights and gender for 20 years in various capacities – as a grassroots practitioner, trainer, material and curriculum developer, researcher and activist. She has helped design and implement various innovative education programmes for women and has been involved with policy and advocacy work. Malini has an M.A. in Political Science from the New School for Social Research, New York and a B.A. in Economics from Presidency College, Calcutta University, India.

Notes

- 1 Two recent studies conducted by Nirantar, examining the linkages between literacy, leadership and capacity building within self-help groups found a high correlation between literacy levels, leadership opportunities and access to credit. And since socio-economic status and education are correlated leadership tends to get concentrated in the hands of the better-off members (Nirantar. 2007. *Examining literacy and power within self-help groups: A quantitative study* and *Examining empowerment, poverty alleviation and education within self-help groups: A qualitative study*. New Delhi).



Chris Duke and Heribert Hinzen

ADULT EDUCATION IN MIGRATION AND INTEGRATION

Abstract

Migration and its implications in terms of the integration of migrants have become a major challenge for most countries in the global economy. They generate many different learning (as well as social, political, and other personal) needs, and thus make big demands on adult education. Sending and receiving societies as well as the migrants, including migrant returners, internal migrants and 2nd and 3rd generation migrants, are all affected. An international Conference in Bonn in November 2007 set out the dimensions of the task, and the challenges that it presents for adult educators.

LA EDUCACIÓN DE PERSONAS ADULTAS EN LA MIGRACIÓN Y LA INTEGRACIÓN

Resumen

La migración y sus consecuencias en términos de integración de migrantes se han convertido en un desafío importante para la mayoría de los países en la economía global. Generan muchas diferentes necesidades de aprendizaje (así como sociales, políticas y personales), y por ende exigen mucho a la educación de personas adultas.

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Todos están afectados: las sociedades de origen y las receptoras, los migrantes, incluyendo los migrantes que regresan, migrantes internos y 2ª y 3ª generaciones de migrantes. Una Conferencia internacional llevada a cabo en Bonn en noviembre de 2007 expuso las dimensiones de esta tarea, y los desafíos que presenta para los educadores de personas adultas.

L'ÉDUCATION DES ADULTES DANS LE CONTEXTE DE LA MIGRATION ET DE L'INTÉGRATION

Résumé

La migration avec tout ce qu'elle implique en matière d'intégration des populations émigrées est devenue un défi majeur pour la plupart des pays dans le contexte de l'économie mondialisée. Ainsi crée-t-elle une foule de besoins éducatifs (mais aussi sociaux, politiques et personnels) divers, si bien que l'on attend beaucoup de choses de l'éducation des adultes. Les sociétés d'immigration et les sociétés d'accueil sont au même titre concernées par ce problème que les personnes qui s'expatrient, retournent dans leur terre d'origine ou migrent à l'intérieur de leur pays et les émigrés des seconde et troisième générations. La conférence internationale qui s'est tenue à Bonn en Novembre 2007 a présenté la tâche à accomplir et les défis qu'elle comporte pour les éducateurs d'adultes.

The ICAE Executive decided at its last meeting that as one of the thematic contributions to the next UNESCO World Conference on Adult Education in Brazil 2009 migration and integration are of great importance from a civil society as well as a professional perspective.

ICAE and its members have already substantial experiences in this thematic area. A process of information, consultation, and cooperation was strengthened via a major conference that took place last year. This virtual seminar will contribute further to the process.

Concepts and meanings of migration and integration

To adult educators, as to social and economic planners, demographic change has tended to mean an ageing longer-living population with smaller young and larger older age cohorts, especially in the older industrialised countries but spreading to other societies as they become more wealthy and urbanised. However, migration and consequently integration have become very major demographically driven policy issues in recent times. There are huge challenges for adult education, as for the social structure and social cohesion more generally.

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The report of the Global Commission on International Migration prepared on behalf of the UN Secretary-General in 2006 on *Migration in an Interconnected World: New Directions for Action* concludes 'that the international community has failed to capitalise on the opportunities and to meet the challenges associated with international migration. New approaches are required to correct this situation.' (<http://www.gcim.org/attachements/gcim-complete-report-2005.pdf>)

But what new approaches? It may help to analyse the old approaches and try to see better what has failed and why. That task waits to be done.

Numbers of migrants vary and are unreliable, but are continuously on the rise. Numbers as high as 200 million people are asserted; and tens of millions move just in the larger populated countries as internal migration.

Migration takes many forms and is driven by both economic and political factors. Much migration is not planned. People leave their countries for many reasons: to seek political asylum, as refugees, to join families, or find better economic opportunities.

Migration has big implications for 'exporting' as well as 'receiving' countries. Some migration is temporary (for example, 'guest workers' and those on short-term work permits); some is permanent; some is intended as temporary but changes to become permanent.

Where there is migration, people should be prepared for this big step. Preparation can take the form of learning the language in advance, getting a better understanding of the new culture and conditions, or getting proper training for the new job and employment that is waiting.

When there is migration, then integration should follow. What does this actually mean? Is it really different from assimilation? People in receiving countries should be prepared to respect cultural diversity but what realities do most migrants encounter? There have been large and usually negative changes of attitude towards immigrants in many countries of late: often the economic need for new labour is in conflict with anxiety about being 'swamped by foreigners', and about unfamiliar cultures. Globalisation goes in hand with new forms of nationalism.

Learning from a conference

Adult learning, education and training have a vital role to play for migrants in both sending and receiving countries. The diversity of realities is undeniably high, but people have a lot to learn from one another.

We have begun this learning process with a major conference which could be a starting point for a global network on Migration and Integration of adult education associations, migrant organisations, and those in some way preparing or receiving migrants through education. ICAE virtual seminar participants could helpfully look at what was discussed. One of the conference outcomes is presented here.

Conference statement and report on The right to education in the context of migration and integration

More than 200 participants from about 50 countries came together in Bonn 15–16 November 2007 to inform one another and to search for ways to cooperate more closely in the future, in the complex and diverse field of migration and integration through adult education.

The main goal was to create a forum to exchange ideas and experiences about the challenges of migration processes for European and international cooperation in the field of adult education, including contributions towards the development of civil societies through integration processes in the countries of immigration.

Organisers and conference context

The conference had as main partners, the International Council for Adult Education (ICAE), the European Association for the Education of Adults (EAEA), and the German Adult Education Association (DVV) representing global, European and national dimensions. Sponsors included German Ministries, and especially TELC, the European Language Certificates company. The Deutsche Welle served as Media partner. The conference was jointly planned and organised by DVV International.

Participants represented the rich background of professional associations, non-governmental and community-based organisations, governments, and universities. Aspects of gender mainstreaming were strongly featured in the different thematic keynotes, forums and workshops.

International participants especially appreciated being informed of recent developments in adult education and integration policy and practice in Germany, which deals with a wide range of social, cultural and educational issues. This contributed to the understanding that we can all learn from one another. Conversely, European and German participants learned much from the global perspectives introduced by colleagues from African, Asian and Latin American countries.

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The presentation of different concepts of education in international cooperation is one way to contribute to a change in perspective viewing migration more as an opportunity than as a threat. As the Global Commission on International Migration put it, this is a trans-national phenomenon; migration and integration must be regarded as two sides of the same coin. The impact on development aid and cooperation must be explored further.

The right to learn

Learning societies need lifelong learning, and structures to support learning, education and training throughout the lifetime, as a child or as a younger or older adult, be it informal, non-formal or formal. Recognising the diversity of adult education cultures in the different countries and regions, different intercultural learning approaches were discussed.

Participants analysed in detail experiences in language learning. This was seen as crucial to integration and participation. Assessing and testing language competences were looked at as a criterion for immigration. Are the diversity and the plurality of languages of immigrants a potential or a threat? How does adult education enhance a multilingual society, and what can adult education do to open the receiving society inter-culturally?

A second forum examined the right to education, learning and training as a foundation for the equal rights of migrants in integration and participation. Recognition by host countries of migrants' formal and non-formal qualifications, and their further up-grading within processes of lifelong learning for all, are of great importance. How can host countries appreciate diversity and create space for political participation for people with a migration background? What are the conditions to guarantee access, availability, acceptability and adaptability of education especially to vulnerable and silent groups such as migrant women and young refugees?

A forum on migration and development looked at the educational needs of migrants. What can adult education do before emigration, and after arrival in the new country? How can this work include all members of the families? Who are the important actors in this process? The discussion centred on issues of brain drain, brain gain, and brain circulation who gains from migration? There is a clear indication that money transfers of migrants to their home countries (remittances) exceed development aid flows in many countries. Finally, this forum analysed educational needs from processes of internal migration.

The way ahead

For this event the organisers built on such recent meetings of adult educators as the DVV Berlin convention *Learn something new Shape the future Bring people together* in May 2006, the ICAE Seventh World Assembly on *Adults' Right to Learn: Convergence, Solidarity and Action* in January 2007, and the EAEA conference on *Equal Opportunities for All the Value of Adult Learning Promoting Equality*, in December 2007. They also looked towards the major forthcoming UNESCO world conference on adult education, CONFINTEA VI in 2009 in Brazil, and its regional preparatory conferences in 2008, where issues of adult education in migration and integration should be significant.

ICAE, EAEA, DVV and the participants of this conference on migration and integration will try to ensure that the most pressing and urgent issues of poverty reduction and social inclusion – and the crucial role that adult education has to play in all these areas through civic education and skills training as well as literacy and basic education – shall be treated with more professionalism and solidarity in the future. The conference strengthened the foundations for all these processes. It increased capacities and the motivation of the participants to get further involved, and to involve others.

More information on the content and results of the conference can be found on www.migrationandintegration.de

The organisers are on www.icae.org.uy, www.eaea.org, www.dvv-vhs.de, www.dvv-international.de and www.telc.net

Invitation

How can we continue the analysis leading into policy making? And how can we do it from a truly global perspective?

We are currently in the process of analysing the documents and findings of the conference further, together with materials that have been published.

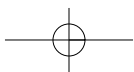
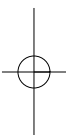
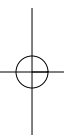
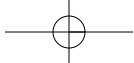
Colleagues who are interested to contribute to the virtual seminar are invited to get in contact with the ICAE Secretariat. Please send your ideas, suggestions, opinions, research results, materials, and documents.

Later we will decide how to include contributions and findings in the ICAE Document being prepared for the regional pre-conferences in 2008 and the global CONFINTEA VI in Brazil in 2009.

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Professor Chris Duke has worked in the field of adult non-formal education for development from the base of different UK and Australasian universities, especially with and for ASPBAE and ICAE, DVV-IIZ and UNESCO, since the early 1970s. His other main area of main professional work relates to the engagement of universities with their societies, in contributing to balanced social and economic development.

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Babacar Diop Buuba

AFRICA: SETTING FOR HUMAN MIGRATION

Abstract

Analysis of African migrations can help to understand prehistoric, historical, ancient modern and contemporaneous migrations. Movements of populations were and continue to be so intense that, for some analysts, they constitute one of the dominant trends of the history and destiny of the very old continent. African and non-African states, whether providers or receivers, have their policies coordinated or not concerning this phenomenon, intergovernmental organisations or those from the UN system try to give their input for norms in migrations. African and international civil society organisations produce analysis, develop policies; in general they defend migrants' rights. The author proposes a participatory and concerted management of the phenomenon; he invites the co-development and emergence of new citizenship – multicultural and based on solidarity.

ÁFRICA, ESCENARIO DE LA MIGRACIÓN HUMANA

Resumen

Análisis de las migraciones africanas pueden ayudar a comprender las migraciones prehistóricas, históricas, antiguas, modernas y contemporáneas. Los movimientos poblacionales han sido y continúan siendo tan intensos que, para algunos analistas, constituyen una de las tendencias dominantes de la historia y el destino del muy viejo continente. Los estados africanos y no africanos de origen o receptores tienen sus políticas coordinadas o no con respecto a los fenómenos, organizaciones intergubernamentales o las del sistema de Naciones Unidas que intentan hacer su aporte de normas sobre migraciones. Sociedades civiles africanas e internacionales producen análisis, desarrollan políticas, en general, defienden los derechos de los migrantes. El autor propone una gestión participativa y concertada del fenómeno; invita al desarrollo conjunto y al surgimiento de una nueva ciudadanía multicultural y basada en la solidaridad.

LES MOUVEMENTS MIGRATOIRES EN AFRIQUE

Résumé

Analyser les migrations en Afrique peut nous aider à comprendre les mouvements migratoires préhistoriques, historiques, anciens, modernes et contemporains. Ces mouvements qui ont conservé leur forte intensité constituent, pour certains analystes, la tendance dominante de l'histoire et de la destinée de ce très ancien continent. Les États africains ou non, d'où partent ces mouvements ou qui accueillent les migrants, coordonnent parfois, mais pas systématiquement, leurs politiques concernant ce phénomène, les organisations intergouvernementales et celles du système onusien pour participer à la création de normes en matière de migration. Les sociétés civiles africaines et internationales produisent des analyses, conçoivent des politiques et défendent d'une manière générale les droits des migrants. L'auteur propose une gestion participative et concertée de ce phénomène. Il invite au co-développement et souligne la nécessité urgente d'une nouvelle citoyenneté, multiculturelle et reposant sur la solidarité.

What's interesting about this reflection on African migration is that it describes how African civilizations were formed. What's more, it helps understand population movements around the world. In our continent, these population movements have been, and are still, intense, to such an extent that some thinkers have turned it into one of the main features of African history.

Ancient migrations

Claudio Moffa (1995) considers that one of the determining factors in African history is 'the struggle among opposing sectors, lineages or ethnic groups, and,

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particularly, in primitive Africa, the fights for control over natural resources: rivers and lakes, productive land and breeding or hunting areas, mines, etc.' The Italian author, historian and reporter expresses his simplistic concept of African history. Considering the importance of African migrations it is possible to find the link of the continuum, without forgetting the disruptions in this large evolution.

Mabogunje, in *Historical geography: economic aspects*, insists on geographical factors that explain the extent of migration flow in certain parts of the continent.

'African prairies provided considerable resources to ancient human beings. Not only were they easy to plow, but also easier to move along. Easy displacement was a key factor for peoples' settling. Africa is, *par excellence*, a continent with huge human migrations, some of which have been reconstructed thanks to archaeological, ethnological, linguistic and historic testimonies. These huge population movements were significant due to the fast dissemination of new ideas and, particularly, of tools and techniques. This spread has been so fast that recent research frequently faces difficulties to determine the origins of certain innovations. Peoples' mobility has always been a vital factor for the organisation of population in political bodies. African savannahs have played a beneficial role because they favored the necessary conditions for the birth of states in Africa.' (Mabogunje, 1980)

These migrations can be violent or non-violent, and they have caused different results.

'On one hand they promote progress because their subsequent and convergent layers ensure, little by little, the possession, and even command over the continent, and thanks to the emerging exchanges, they exalt the innovations by virtue of some kind of cumulative effect. But, on the other hand, as population density has diminished in an excessively huge space, migrations prevent human beings from reaching the threshold of concentration that forces them to go beyond their own capacity to invent survival methods. Dissolution in geographical environment increases the influence of the latter and tends to take the first African tribes back to their obscure origins where human beings traced a painful concept through the opaque crust of the unintelligent universe.' (Ki-Zerbo, 1980)

These movements that were already strong in prehistory were sometimes accelerated in ancient times, in intermediary times up to modern and contemporary times.

Recent migrations

In 2002, statistics of the High Commissioner for Refugees (HCR) mentioned 19.8 million people who were under their jurisdiction, of which 4.2 million were in the continent (3.3 million refugees, 500,000 displaced people and 267,000 repatriates). (OACNUR, May 2002, *Africa, facts and figures*).

‘These population flows, qualified as involuntary, are frequently a consequence of civil wars, governmental oppression, political disorder, ethnic, political or religious chases, as well as environment catastrophes such as drought and famine. These factors are combined in a regional system, distorted by the new international order that emerged by the end of the cold war, the weak level of economic development, the repeated violations to human rights or even the circulation of several arms in all the region.’ (Gnisci, Trémolières and Hussein, 2003)

In view of this situation, different responses either from the States or from civil society come up.

State response

The New Partnership for Africa’s Development (NEPAD) that has somehow raised hope before States, even before African and international opinion, paradoxically, has not dealt with the issue of African migration. Ultimately, the issue of the elimination of non-tariff barriers could be mentioned. Point B could also be exploited: Sectoral priorities, B2, remark human resources, sub-point III reverse the tendency of brain drain.

Lack of focus on the issue of migration is confirmed when we analyse the discourse of President Obasanjo at the ‘sectoral Program Overview’, (2003/2004), as well as the report from the President of the Executive Council and Executive Director of the Secretariat, Professor Wiseman Nkuhlu: not one word about migration. We must recognise that the African Union, in return, clearly perceived what’s at stake and President Konaré launched the idea of an African passport.

Stay or leave

The heroes of the Aminata Sow Fall's novel *Douceurs du bercail* chose to return to their countries but with a clear perspective: to reconstruct their homeland. Their conviction is also presented:

‘Nowadays, the hardest thing is that hope vanishes...Let us love our land, we will water it with our sweat and dig with all our strength, with courage. The light of hope shall guide us, we will harvest and build. Only us can borrow the routes of the sky, the land and the water without being chased like an outcast or pariah. We will no longer be travelers without luggage. Our callous hands will find others in warm handshakes of respect and shared dignity...’

This return movement that was registered from the beginning of the 70s was illustrated by a Safrana movie of Sidney Sokona from Mauritania; NGOs such as the GRDR (Research Group for Rural Development in the Third World, in France and Africa), training centers such as the Bakel Center whose activities take place in Senegal, Mali and Mauritania, are, at least, an outgrowth of this dynamic.

NGOs such as USE (Union for the Solidarity and Mutual Help in Senegal that has just celebrated its 50th anniversary, in 2005), foundations such as FRAO (Rural Foundation of Western Africa) engage in sustainable activities in the so-called, co-development.

Conclusion

We have also proved, in the light of our reflections on inter and extra African migration, that migrations reveal ecological, socio-political, economic and cultural trends. They are or can be, sources of progress, cause regression or a status quo factor. We can take the opportunities offered within the framework of globalisation if we reach a consensus that ‘must result in a common action plan. All this process has the objective of making migration a social and economic development vector’ (the point of view of the International Organization for Migrations, expressed during the GRDR Seminar in 2000).

The FORIM (Forum of the International Solidarity Organizations Resulting from Migrations), created in 2002, called the attention on the ‘double feeling of belonging’ by promoting actions carried out in France around integration, cultural exchange and development actions for the country of origin’.

The world commission on the social dimension of globalisation, implemented by ILO, whose report was published in 2004, makes recommendations on international people's movements. These recommendations comprise three levels:

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- conventions and international obligations
- dialogue between countries, distinction made by virtue of the great common gender issues
- a more general institutional Framework for the International people's movements.

The report invites to reinforce the power of multilateral organisations that are in charge of people's movements (in particular ILO, IOM, the UN Human Rights organisations and the HCR) and to better coordinate among them. The participation of civil society organisations in the reflection and in the action plans could be a decisive contribution as long as they can coordinate by themselves their actions.

Babacar Diop Buuba is chairman of PAALAE (Pan African Association for literacy and Adult Education). He is Professor of ancient history at Cheikh Anta Diop University (Dakar, Senegal). As a student he spent six years with African migrants in France. He was active in the liaison committee of the students to support workers' initiatives on literacy and culture. He was an activist in the Senegalese (AESF) and African student movement (FEANF). He was also very active in the "Patrice Lumumba" group theatre and music from 1977 to 1980.

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William Gois

MIGRATION AND ADULT EDUCATION

Abstract

The objective of this paper is to highlight the role of adult education as a tool in addressing labour migration issues, specifically those concerning the protection of migrant workers' rights and the transformation of the impact of migration into positive holistic developmental gains.

The view of labour migration as a means to forge the economic stability of countries in this era of neo-liberal globalisation has put migrant workers at a highly vulnerable position open to persistent forms of exploitation and abuse. Issues that revolve around this topic have been the subject of many international discourse which has led to the formation of national migration regulations/policies, as well as bilateral and regional agreements between states in an attempt to respond to the urgent needs of migrant workers and manage their migration while continuing to benefit from the process. However, migration controls alone have not been progressive in resolving the core problems of labour migration reflecting the need for more structural reforms and strategies.

Many civil society groups have recognised adult education as a promising platform from which to launch effectively a campaign to resolve migration issues. In line with this

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principle, several efforts from this sector have been made such as awareness campaigns that inform migrants of their labour and fundamental human rights. It is imperative for governments of both origin and destination countries to follow suit. Establishing effective and sustainable adult education programmes that build on the dignity and capability of migrant workers is beneficial to both social and economic development. Better pre-departure orientations, widespread information in accessing available protective mechanisms, integration and reintegration processes, savings management are underscored as plausible foci of such programmes.

MIGRACIÓN Y EDUCACIÓN DE PERSONAS ADULTAS

Resumen

El trabajo destaca el papel de la educación de personas adultas como una herramienta para abordar temas de migración laboral, específicamente los que tienen que ver con la protección de los derechos de los trabajadores migrantes y la transformación del impacto de la migración en ganancias de desarrollo integral positivas.

La visión de la migración laboral como un medio para forjar la estabilidad económica de países en esta era de globalización neoliberal ha colocado a los trabajadores migrantes en una posición mucho más vulnerable, expuesta a persistentes formas de explotación y abuso.

Muchos grupos de la sociedad civil han reconocido que la educación de personas adultas es una plataforma prometedora desde la cual lanzar efectivamente la campaña para resolver los temas de migración. Siguiendo este principio, se han realizado diversos esfuerzos desde este sector, como campañas de concienciación que informan a los migrantes acerca de sus derechos laborales y humanos fundamentales. Es imprescindible que los gobiernos de los países de origen y receptores hagan lo mismo y establezcan programas de educación de personas adultas efectivos y sostenibles.

MIGRATION ET ÉDUCATION DES ADULTES

Résumé

Cet article met en relief le rôle de l'éducation des adultes en tant qu'outil pour aborder les questions liées à la migration professionnelle, notamment celles relatives à la protection des droits des travailleurs immigrés et à la transformation de l'impact de la migration en bénéfices holistiques du point de vue du développement.

La notion de migration professionnelle en tant que moyen de stabiliser l'économie des pays à l'ère de la mondialisation néolibérale a placé les travailleurs immigrés dans une situation très fragile, ouvrant la voie à des formes persistantes d'exploitation et d'abus.

Nombre de groupes de la société civile ont reconnu que l'éducation des adultes constituait une plate-forme prometteuse à partir de laquelle on peut lancer efficacement la campagne afin de résoudre les problèmes liés à la migration. Dans l'esprit de ce

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principe, différents efforts ont été entrepris dans ce secteur : campagnes de sensibilisation pour renseigner les immigrés sur leurs droits professionnels et sur leurs droits humains fondamentaux. Il est impératif que les gouvernements, tant des pays d'origine que des pays d'accueil, fassent de même et mettent en place des programmes d'éducation des adultes efficaces et durables.

Background

In Asia, migration is an existing phenomenon that cannot be escaped from. The region is divided by two opposing sides, sending and receiving countries, both creating policies and development plans which include migrant labour in the agenda.

Some of the biggest sending countries belong to the Asian region. The rate of increase of the migrants being sent abroad by some of the biggest sending countries in Asia continuously rises every year. Some of these countries include Indonesia, Philippines, Thailand, Bangladesh and Sri Lanka. On the other hand, the need for migrant labour on some of the leading and industrialised nation in the region also increases, thereby absorbing the labour force available to them.

On an off hand view, the needs of countries in the Asian region seem to respond to each other. From the sending countries' perspective, excess labour and resources creates a need for the labour force to look for avenues outside the existing market. The receiving countries, in return, because of factors such as declining population, or increasing needs for production, will also look outside their meagre resources, and access outside markets. This is alright, if we are just discussing factors of production and how countries resolve their labour surplus or lack thereof.

Migration is never a national issue alone. It crosses borders and addresses the needs of countries, and provides variety to an otherwise tedious existence. Throughout history, migration has provided different countries with colourful accounts of their culture. Mobility is one of the biggest contributions to the continuous evolution of culture, a by-product of people's needs for survival.

According to the International Labor Organization (ILO), of the people in work, 550 million are living on less than a US dollar a day, while almost half the world's 2.8 billion workers earn less than two dollars a day. In Asia, in some of the sending countries, the percentage of population who earn less than two US dollars a day is huge: Bangladesh – 82.8%, India – 79.9%, Pakistan – 73.6%, Nepal – 68.5%, Philippines – 45.7%, Egypt – 43.9% (World Development Indicators, 2006, World Bank. From *Social Watch Report 2006*). Even five US dollars a day for domestic helpers in the Middle East, Singapore

and Malaysia is sufficient to pull migrant workers, if given the opportunity. International migration is simply not an option for many, but a necessity, especially those from developing countries.

Migration has become a developmental tool, looked upon by the governments of the sending countries as a means to solve the growing demands of industries for labour. Migrant remittances, in the recent years have also shown that it contributes to the economy's needs for foreign funds, pulling up their declining Growth National Products (GNP), thereby enabling them to tout to the public achieving a positive growth in the economy.

Yet despite these positive avenues for development, accounts of the experiences of migrant workers abroad rarely portray their situation as all good and well. Migrant labour might earn more than their local counterparts, but the fact remains, that life as a worker in a foreign land requires sacrifices, sometimes more than the migrants bargained for. In their home countries, there is seldom a day where news of migrant abuses and violations are not featured in the news.

On the other hand, the more developed countries, such as Malaysia and Singapore need foreign workers for their economy to operate. In the case of Singapore, where there is a large elderly population, requiring medical care and assistance, migrant workers are required for these services, and there is also a need for an influx of foreign professional labor for industry. Malaysia also faces the same dilemma. Since most of their population is more or less employed in some kind of industry; the country's population needs domestic workers to care for their children while they work. Migrant labour was seen as a solution to this dilemma.

Issues on migration

Migration for employment is now seen by nearly all national authorities as a factor of the globalisation processes, not only in terms of raising the returns on investment in education but also as an advantage, in terms of technology transfer, information and trade opportunities. On the other hand, these developments brought about by globalisation seemingly created a whole new different era of issues and concern, in terms of human rights and sustainability of development.

Issues on the well-being of migrant workers are on the forefront of these concerns. Because it is advantageous for migrant workers to earn abroad, they are easy prey for illegal recruiting agencies as well as trafficking. Cases of workers, in their desperation to provide for their family, being forced to do jobs not stated in their contracts are rampant. Victims of illegal recruitment are

forced to pay exorbitant amounts of money and are subjected to an even worse way of life. Workers are sometimes forced to work illegally in a foreign country for their family's survival. Exorbitant fees charged by recruitment agencies, also force workers to find other means of entry to work abroad. This places them in a precarious situation, where they are forced to either bend to the demands of their employers for fear of reprisals from the authorities or be deported and lose their source of income.

Sending governments, despite their efforts to ensure protection for their migrant labour, often find themselves in a conundrum. In the Philippines, for instance, the government has provided several mechanisms to protect migrant workers and has entered into agreements with receiving countries. It has ratified and continuously promotes human rights protection of migrant workers among its peers, yet has also implemented policies and trade agreements detrimental to the well-being of these workers. Efforts for protection are almost always overridden by the mechanism for economic progress.

Receiving governments in the same dilemma refuse to recognise the positive impact of migrant labour to their economy. Migrant labour provides the necessary workforce in sectors which otherwise will not function, since most of their workforce is involved with other high-paying jobs. Crackdowns on undocumented migrant workers are a regular occurrence. Amnesty programmes, which in some cases still put the worker in a disadvantaged position by demanding taxes from their already meagre earnings, do not always work. Also, workers with legal status are at risk from their employers as well as recruitment agencies, because of the lack of recognition of the receiving countries to the protection mechanisms provided by their sending government. Governments of receiving countries have very few protection mechanisms for migrant workers.

One of the most pressing issues on migration discourse today is how governments of both sending and receiving countries manage migration. It is on both side's advantage, to recognise that migration is not a problem to be solved, but a process of education and continuous collaboration to be discussed. Countries in different regions of the world are becoming increasingly integrated and interdependent, linked by rapid flows of capital, goods, services, information and ideas. Access to knowledge has become a key determinant of competitiveness and success (GCIM Report, 2005).

Adult education

In the case of developing countries such as Indonesia and the Philippines, the civil society has done much to promote a consciousness on the need for education and information with regard to the migration discourse. Continuous lobbying and advocacy resulted in the implementation of laws and policies

intended for the promotion and protection of the rights and well-being of migrant workers. Several countries in Asia have in fact implemented and exerted efforts to address the pressing need for migrant workers' protection.

In the Philippines for instance, the migrant workers' protection mechanisms are relatively advanced compared to other sending countries in the region, and have provided protection to Filipino migrant workers. In an effort to further the protection extended to its migrant workers, the government has entered into bilateral agreements with host country governments. The Philippine government has also provided trainings and seminars, in partnerships with non-government organisations for migrant workers before they leave the country. Pre-departure orientations, involving training on skills needed for their job as well as administering a consciousness on their rights as workers are part of these efforts.

Yet, it is in this context that issues on sustainability arise. Pre-departure orientation seminars provide limited information about labour rights and protection mechanisms available in times of distress at the host country. There is a need for education and integration of values for migrant workers to realise the necessity of savings as well as investment.

Both the government and migrant workers need to realise that education is both a process of teaching values and standards and that it must be a mutual learning process. Addressing the pressing needs of migrant workers before deployment does not necessarily mean, addressing the crux of the problem. Providing migrants both in the receiving and sending country access to learning on how to manage their resources as well as training for future application would somehow lessen the need for migration in the future.

As sending countries are taking on the issue of migration, so should the receiving countries. Concern for the welfare of migrants in terms of integration should also be focused on. Host countries must learn to raise the capacity of migrant workers to relate them with the host society, learning their history and culture, adapting to and becoming productive partners in the life of society. (Mayan Villalba, 2007)

A recent initiative of the Gulf Cooperation Council (GCC) held on 23–24 January 2008 was the Gulf Forum on Temporary Contractual Labor, to which civil society representatives were invited to enter a dialogue with both sending and receiving governments about the different issues around migration. The Forum has been viewed as the first step in a series of dialogues that is likely to have a major bearing on understanding labour movement dynamics by the State and non-State parties concerned and ultimately on the protection of the Asian migrant labor force deployed in the region. Accordingly, the Forum acknowledged the right of State to develop labour and migration policies, as

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well as the need to look into critical issues that workers face, so as to ensure protection of workers' rights in all phases of the employment cycle.

Migrant Forum in Asia has been invited to be among the speakers on a session which aims to discuss the framework for collaboration among countries of origin and GCC labour receiving countries. This could be considered as one of the most remarkable developments on civil society engagement with governments, involving a discussion and cooperation on both sides, starting the dialogue towards a learning process.

Opportunities for action

Education is an important dynamic in change and progress, creating a space for the developing of relationships and devising solutions to an otherwise irrevocable margin. Migration controls alone will not be adequate to deal with migration issues and concerns. The problem needs to be addressed on a broad front since it has many dimensions.

The governance of international migration should be enhanced by improved coherence and strengthened capacity at the national level; greater consultation and cooperation between States at the regional level, and more effective dialogue and cooperation among governments and between international organisations at the global level. Such efforts must be based on a better appreciation of the close linkages that exist between international migration and development and other key policy issues, including trade, aid, State security, human security and human rights (GCIM, 2005).

The Global Forum on Migration and Development (GFMD), which was the outcome of the UN High-Level Dialogue on Migration and Development, is a good avenue to discuss bilateral and multilateral agreements on integration and adult education. The 2008 GFMD to be held in the Philippines should be an opportunity for the developed countries in the North to take a closer look at the conditions of the countries in the South, where migration has become a first option to address poverty.

Adult education to address migration issues and integration/reintegration strategies must be raised as a critical theme in the 2008 GFMD. It should discuss bilateral partnerships between adult education agencies in the North and reintegration programmes in the South by all migration actors, government, civil society, private sector and the academe. (Villalba, 2007)

The presence of international civil society networks enabling migrant workers to receive the benefits of adult education in both sending and receiving countries should also be noted. It is in the interest of both sending and receiving

governments to recognize that capacity-building of migrant workers is advantageous to both sides.

A challenge to development in this globalised world is not on the quantity of factors of production, but recognising the need for building relationships, and starting a process of learning, structural adjustments and coherence on policies both transparent to the governments and workers.

The road to development should be regarded as a shared responsibility with countries of origin and destination, therefore acting as equal partners in protecting and promoting the rights of migrant workers.

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Ana Agostino

POVERTY, EDUCATION AND WORK: SOME INTRODUCTORY THOUGHTS

Abstract

The article argues that poverty must be understood within a human rights approach, moving beyond a narrow economic definition. Recognising the multidimensional character of poverty also leads to acknowledge that there are no universal answers. Solutions must be culturally determined and this poses one of the major challenges for adult education and work in relation to poverty eradication: to promote processes of self-determination and self-discovery rather than being oriented towards efficiency and economic growth. The article analysis this dimension looking at different possible approaches to education and work, distinguishing an instrumental one and one that will facilitate the integration of human beings not only into the economic sphere but into the social, cultural and political dimensions as well.

POBREZA, EDUCACIÓN Y TRABAJO: ALGUNAS REFLEXIONES INTRODUCTORIAS

Resumen

El artículo sostiene que la pobreza debe ser entendida dentro de un enfoque de los derechos humanos, yendo más allá de una definición económica estrecha. El

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reconocimiento del carácter multidimensional de la pobreza también lleva a reconocer que no hay respuestas universales. Las soluciones deben estar determinadas culturalmente, lo que plantea uno de los mayores desafíos para la educación de personas adultas y el trabajo con relación a la erradicación de la pobreza: promover procesos de autodeterminación y descubrimiento de uno mismo más que orientarse hacia la eficiencia y el crecimiento económico. El artículo analiza esta dimensión distinguiendo posibles acercamientos a la educación y al trabajo, uno instrumental y otro que facilitará la integración de los seres humanos no sólo en la esfera económica sino también en las dimensiones social, cultural y política.

UNE RÉFLEXION SUR LE THÈME DE LA PAUVRETÉ, DE L'ÉDUCATION ET DU TRAVAIL

Résumé

L'article avance que la pauvreté doit être perçue au sein d'une approche reposant sur les droits de l'homme, au-delà d'une définition économique étroite. Reconnaître le caractère multidimensionnel de la pauvreté conduit aussi à admettre qu'il n'existe aucune réponse universelle à celle-ci et que les solutions doivent être déterminées culturellement, ce qui constitue l'un des principaux défis pour l'éducation des adultes et pour les activités liées à l'éradication de la pauvreté puisqu'il s'agit ici les axer de préférence sur les processus d'autodétermination et de découverte par soi-même, plutôt que de les orienter vers l'efficacité et la croissance économique. L'article analyse cette dimension. Il examine pour cela différentes approches possibles de l'éducation et du travail, et distingue entre une approche instrumentale et une approche facilitant l'intégration des gens, non seulement dans la sphère économique, mais aussi aux plans social, culturel et politique.

'Adult education thus becomes more than a right; it is a key to the twenty-first century. It is both a consequence of active citizenship and a condition for full participation in society. It is a powerful concept for fostering ecologically sustainable development, for promoting democracy, justice, gender equity, and scientific, social and economic development, and for building a world in which violent conflict is replaced by dialogue and a culture of peace based on justice. Adult learning can shape identity and give meaning to life. Learning throughout life implies a rethinking of content to reflect such factors as age, gender equality, disability, language, culture and economic disparities.' (The Hamburg Declaration, 1997)

Poverty and inequality are the biggest challenges human beings face in the twenty-first century. Global poverty statistics do not always coincide with the extent of the problem, as there are different approaches on how to measure and, above all, how to understand and define poverty. But independently of whether

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1.6 billion people live in poverty (if taking the World Bank definition of living on less than one US dollar a day), or more – or less – if taking other definitions, the numbers are always a reason for indignation. Precisely because they are not numbers, they are human beings who live in a world of plenty and in spite of the over-consumption, squandering and waste that characterises the capitalist global society, millions of children, women and men live without the possibility of satisfying their most basic needs, die from preventable and curable diseases, are excluded from democratic processes, suffer discrimination and exploitation and lack the possibility to autonomously decide the path of their lives.

Overcoming poverty and inequality is therefore the most important task that should motivate policy formulation, research and also the field of education and of adult education in particular, if looking at the above quote from the Hamburg Declaration. But how we understand and define poverty is not irrelevant as the paths to follow will vary if we stick to the traditional definitions that only refer to the material and economic aspects of poverty or if we take as our framework a human rights approach to poverty eradication.

When one defines poverty as the systematic denial of social, economic and political rights one moves away from an approach for which economic growth provides the solution. If human rights are placed at the centre of a paradigm rather than profit, human beings are not expected to exclusively operate according to market rules and live with the consequences but norms are put in place to ensure that every person has the means for the full development of his/her personality and citizenship. The International Covenant on Economic, Social and Cultural Rights recognises that ‘in accordance with the Universal Declaration of Human Rights, the ideal of free human beings enjoying freedom from fear and want can only be achieved if conditions are created whereby everyone may enjoy his economic, social and cultural rights, as well as his civil and political rights’. Therefore, a central strategy to combat and prevent poverty is to put in place social policies that ensure citizens the full enjoyment of their rights. This goes beyond the access to income and material resources to guarantee the means for livelihoods and the satisfaction of basic needs. It has to do as well with, active participation in democratic processes, human security, equality within society and within the home, environmental protection, among others. And it has to do also with having the capabilities to engage in these processes, being able to choose a path for one’s own community that has not been previously identified and imposed by others.

This idea of imposition is very important when debating around strategies for poverty eradication, as one of the results of the process of globalisation has been the denial of diversity and the homogenisation, not just of the way in which the world is understood, but of the practices and mechanisms in which diverse peoples are expected to respond to their particular challenges and needs. If we agree that poverty is multidimensional and that it manifests itself in

different forms, caused by global conditions as well as by regional and local ones, we must also agree with the fact that solutions must necessarily be multidimensional as well and above all, culturally determined. There are no universal answers for poverty and inequality except for those that have to do with the global system: fair trade (rather than free trade), elimination of debts that keep national economies unable to respond to local needs, withdrawal of conditionalities attached to development aid so that national plans can be drawn according to national priorities are examples of global measures that will have an impact on different societies around the globe. But beyond that, it is necessary to advocate for the right of each society, and for specific groups within each society, to implement responses that are culturally and socially relevant for them.

This is already one of the major challenges for adult education in relation to poverty eradication: to be able to support processes of self-determination and self-discovery rather than being oriented towards efficiency and economic growth. Education can be instrumental in the sense of providing human beings the necessary skills to integrate into the production system and perform efficiently (with personal results in terms of income and results for the good performance of the markets) or it can focus on the integration of human beings not just in the economic sphere of their societies but into the social, cultural and political dimensions as well. This has to do with an understanding of how societies function, of our place within society, of the different role-players that interact with their specific contributions and shortcomings and of the possibilities that are there or that need to be constructed in order to transform that society for the benefit of all its citizens, fully respecting their differences and particularities.

In the same way then that defining poverty as the lack of material goods or the systematic violation of human rights will impact on the strategies chosen for poverty eradication, whether we see education as instrumental for the well functioning of the markets or for the full development of human beings into active citizens will have an impact on how we approach adult education in relation to work.

First of all, work must be seen as multidimensional as education itself. We should not stick to definitions of work that link it to relationships of dependency mediated by income generation. Work is a productive task that gives human beings a sense of capability, of creativity and of realisation that result in securing livelihoods. Understanding work within this framework allows for the inclusion of essential tasks, usually performed by women, which are the basis of social reproduction but whose contribution for the well being of society is generally ignored. It also allows us to move away from a traditional understanding of the concept of economy based on the scarcity principle. This one is founded on the assumption that means are scarce and that these

insufficient means need to be allocated in the best possible way to provide for endless needs. That is to say, they should be maximised or economised and the privileged space to do this is the market. A different understanding of the economy has to do with human beings' dependency for their survival upon nature and fellow humans. From this point of view the interaction between human beings and their environment is, also, the economy.

Taking this approach leads to a conceptualisation of education and work oriented towards the development of life skills, of the recognition of people's abilities and assets (not just material and economic but personal, cultural, social, etc.) that will facilitate their integration into society and their active involvement in its transformation. Education and work will be mutually determined in the sense that education will not be seen exclusively as instrumental for the acquisition of specific skills that will allow human beings to be incorporated into the labour market but as a means in itself. In this way work the implementation of productive activities that result in improved livelihoods – also serve the aim of expanding educational opportunities by providing human beings a better understanding of themselves, their culture, their societies and the world at large. It will also promote reciprocity in the understanding that improving life conditions is not limited by the available income but that it also depends on interactions among human beings and the support they each provide according to their capabilities and knowledge.

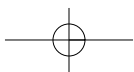
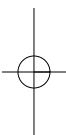
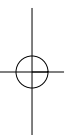
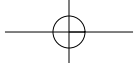
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Astrid von Kotze

POVERTY, WORK AND EDUCATION

Abstract

This contribution suggests that if we are serious about adult education in the context of poverty eradication we require some shifts away from neo-liberal assumptions and values. Women and/in the informal economy should become the central focus, and livelihood studies would better allow us to understand the complex daily struggle for food and the necessities of life intertwined with care-work and community-building.

POBREZA, TRABAJO Y EDUCACIÓN

Resumen

Esta contribución sugiere que si somos serios en cuanto a la educación de personas adultas en el contexto de la erradicación de la pobreza, necesitamos algunos cambios con respecto a los supuestos y valores neoliberales. Las mujeres y/en la economía informal deberían pasar a ser el foco central, y los estudios de subsistencia tendrían que permitirnos entender la compleja lucha diaria por el alimento y las necesidades de vida entrelazadas con el trabajo de asistencia y el desarrollo de la conciencia comunitaria.

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PAUVRETÉ, TRAVAIL ET ÉDUCATION

Résumé

Cet article avance que si nous pensons sérieusement que l'éducation des adultes a sa place dans la lutte menée pour éradiquer la pauvreté, certains changements concernant les hypothèses et valeurs néolibérales sont nécessaires. Les femmes et l'économie informelle devraient devenir notre principale préoccupation et les études consacrées aux moyens d'existence devraient nous permettre de mieux comprendre que la lutte complexe des gens au quotidien pour se nourrir et suffire aux premières nécessités est inextricablement liée aux activités de soin et d'assistance, et à la construction de la communauté.

Starting points

- Notions of 'work' as synonymous with 'employment' are as prevalent as ascribing the causes of hunger (poverty) to a shortage due to underproduction (rather than access/distribution).
- The assumed model of a worker is often still someone (usually male) employed (in industry). If we make a woman working in the informal economy our 'model' the definitions of 'work' and 'labour' begin to shift. Diversification of paid and unpaid activities and food security as a top priority become the norm.
- Working in the context of poverty, livelihood studies (rather than a 'workplace learning' study) better allow us to understand the complex daily struggle for food and the necessities of life intertwined with care-giving, child-rearing, community-building.
- We need to re-think the roles and forms of (vocational) education for poverty eradication. Learning from specific, local and traditional forms of apprenticeships/socialisation into particular work must be a research priority.

If we are serious about addressing poverty through education and training I believe we require to make three shifts in emphasis: from the formal to the informal economy, from work as employment to work as livelihoods, and from sustainable development to sustainable livelihoods.

Three shifts

1. The informal economy as reference for poverty eradication

In official statistics, not only is unpaid work such as the care work undertaken by women both in the household and in communities as volunteers, not counted

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as 'economic' but much of the formal cash-earning work or subsistence production are also excluded from representations of economic activities. (Chen *et al.* 2005) Yet, in the majority world, for increasing numbers of people informal survivalism is the current primary mode of living.

The report *Progress of the World's Women 2005* illustrates how women are generally in more precarious livelihoods than men, that a much greater number of women than men are working in the informal economy, and that their average incomes from the types of employment they are able to access are generally too low to lift their households out of poverty. The report shows conclusively that if we want to understand poverty and why women shoulder a disproportionate load, we need to understand women's work: the relationship between formal and informal paid work, subsistence production, unpaid care work for household members, community volunteer work (Chen *et al.* 2005, p. 23). We also need to understand the gendered division of labour.

Furthermore, urban informal employment in Africa counts for over 60 per cent of total urban employment in Africa, and the UN Habitat report (2003:104) predicted that '90% of urban Africa's new jobs over the next decade will somehow come from the informal sector'. This means, whatever good intentions there are about 'job creation' in the formal economy this is and will be surpassed by relatively poor people creating and giving employment to the poorest and those are usually women. Our first shift has to be towards the informal economy.

2. Defining work as livelihood activities

Work has come to be understood only as a paid activity undertaken on behalf of a third party, to achieve goals set by someone other than ourselves and according to procedures and schedules laid down by the employer (Gorz 1999). If work is defined as livelihood activities it is taken out of commodity production and re-focused on the production of life. In its simplest sense a livelihood is a means to gaining a living (Chambers and Conway 1991). However, when we consider sustainability we need to include not just all those actions undertaken in order to secure a livelihood, but we also must include those labours that reproduce life and living (Mies 1986, Mies and Bennhold-Thomsen 1999) and thus support the basis for other kinds of work. This includes housework and childcare, home-gardening and fuel collection as much as community organising and the often small acts of reciprocity and solidarity that establish and contribute to social protection mechanisms.

The shift from work as employment towards work as livelihood activities should not simply mean replacing one word for another but it represents thinking more holistically about the actions we employ in order to not just survive physically but live a dignified decent life. A more holistic thinking is

required if we want to consider sustainability, and especially establishing a less exploitative relationship to the environment and natural resources, and to people as our partners in systems of reciprocity and conviviality.

3. Towards sustainable livelihoods

Taking on a sustainable livelihoods perspective represents a move away from 'sustainable development' thinking where development is defined in terms of production, employment and poverty-lines or what Seabrook (2002) has referred to as the 'tropic of indigence'. A focus on sustainable livelihoods compels us to consider people's lives and life chances in terms of high-risk environments. The impact of hazards such as diseases/epidemics and weather phenomena on already vulnerable conditions and people renders them unable to cope. As informal workers they face high risks, firstly in terms of the conditions under which they live and work, and secondly, because they have low levels of income and are less likely to be able to save for emergencies or special occasions (Chen *et al.* 2005, Lund and Nichol森 2003). As a result, they are much more exposed to common contingencies such as illness, property loss, death, without having access to the means to address these. Furthermore, as they face exclusion from the state, political institutions, markets, that is, all those who make the decisions that affect them very directly; they have fewer rights or knowledge of their rights, and less access to information, infrastructure and services.

To cope and to make their livelihoods sustainable requires the creation and maintenance of systems of support and a power base for wielding influence in order to affect policy changes. As the State assumes less and less responsibility for social security people have to make their own arrangements for social protection. In the world of the rich and comfortable this translates into insurance policies and the like; in the majority world it translates into all those actions that people undertake in order to expand their capacities to cope and create safety nets for emergencies, rather than simply waiting for the delivery of commodities and services (Lund and Nichol森 2003). Primarily, this involves establishing relationships of mutuality, solidarity, collective action. Workers in the informal economy organise themselves in a variety of forms, depending on issues of geography, culture, the nature and spatial/time conditions of their work and the different types of work performed.

Policy/UNESCO

On the one hand, the UNESCO discussion paper *Technical and vocational education and training for sustainable development* (2006) reiterates a commitment to TVET 'as an integral component of lifelong learning' and a contribution towards 'a culture of peace, environmentally sound sustainable

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development, social cohesion, and international citizenship.’ On the other, TVET is shown to encompass ‘preparation for the world of work’, ‘learning at the workplace’ and other ‘mechanisms for the delivery of further training’, and while citing critical voices that refer to the precedence of economic interests that result in TVET being seen as ‘training for growth’ and ‘skill-for-work’ the document does not move far away from seeing work as employment and TVET serving a capitalist economy as long as it does so in environmentally sustainable ways.

In a study undertaken on behalf of UNESCO, Madhu Singh (2005) sought to demonstrate that far from being helpless victims who are economically inactive people in the informal economy are imaginative and inventive. Therefore, ‘developing education for the informal sector can only be successful to the extent that it reflects innovations, initiatives and approaches emerging from the informal sector itself’ (Singh 2005, 5). Previously, Singh (2000) had listed a range of important educational considerations for education and training for the informal economy and arrived at eight lessons to be learnt from her study.

What emerges as a self-evident and yet still rarely practised basic principle is that people in the informal economy must be part of planning any TVET intervention! Only they are in a position to identify existing skills and knowledge as well as needs so that resources and existing capabilities can be strengthened rather than undermined. This includes recognising appropriate local technologies so that they are not replaced by expensive, non-renewable imported ones.

I want to make five recommendations for education and training for poverty eradication:

(1) TVET should be local and specific: Given that the informal economy is very heterogeneous ‘learning needs vary according to age, urban or rural location, gender, socio-cultural background and education level’ (Singh 2005, 5). What is needed, therefore, is ‘a context-specific mix of interventions, developed in consultation with working poor women and men and informed by an understanding of their significance in the labour force and their contribution to the economy’ (Chen *et al.* 2005, 89).

It is also important to distinguish between learning needs of the segments in the ‘upper end’ of the informal economy and those at the ‘lower end’ (Chen *et al.* 2005, 89). We must move away from the ‘one size fits all’ attempts so characteristic of ‘skills training packs’.

(2) TVET must build on capability: Capability refers to the ability to perform the actions necessary to create and sustain life, including being able to

identify and make use of livelihood opportunities and cope with stress and shocks. However, capabilities must be seen in the context of availability and access.

(3) Broadly speaking, the Freirean term ‘conscientisation’ still captures best what differentiates many (informal) learning processes from education. Analysing what blocks livelihood security, understanding the obstacles to equity are important if you want to work towards creating the conditions and opportunities for widening and opening up choices, for diminishing powerlessness and enhancing dignity and a sense of sovereignty.

(4) TVET for the informal economy must be gender-specific: Understanding the relationship between different types of women’s paid and unpaid work helps shed light on the dynamics of poverty and gender inequality (Chen *et al.* 2005, 29). Hence, designing education/training must take into consideration the impact of expectations about women’s roles in unpaid work as this will directly affect their ability to participate in programmes and sustain such participation.

(5) A focus on organising/collectives/associations: What allows groups of workers to survive are often their associations. Cooperative ventures are also a support base when coping with hazards and unforeseen threats, and a base for much useful learning.

Conclusion

No form of TVET, however negotiated and responsive can compensate for structural material change. I would therefore suggest we need yet another shift; from ‘poverty reduction’ to ‘wealth distribution’. Nothing short of real change will ultimately bring about social justice.

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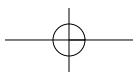
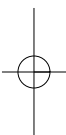
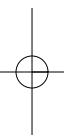
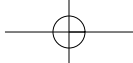
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Marcela Ballara

GENDER AND RURAL EMPLOYMENT: A VIEW FROM LATIN AMERICA

Abstract

The paper focuses women employment in rural areas and its impacts in food security. The presentation includes data on rural women employment and its different labour strategies: temporary work, non agriculture rural employment and permanent rural employment. Poverty alleviation and its impact on families as well as implications in the economic growth of rural areas are also taken into consideration in the analysis of rural women employment.

GÉNERO Y EMPLEO RURAL: UNA OPINIÓN DESDE AMÉRICA LATINA

Resumen

El trabajo se centra en el empleo femenino en áreas rurales y sus impactos en la seguridad alimentaria. La presentación incluye información sobre el empleo de mujeres rurales y sus diferentes estrategias laborales: trabajo temporal, empleo rural no agrícola y empleo rural permanente. La disminución de la pobreza y su impacto en las familias,

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así como las consecuencias en el crecimiento económico de áreas rurales también se tienen en cuenta en el análisis del empleo de mujeres rurales.

L'EMPLOI DES FEMMES DANS LES CAMPAGNES EN AMÉRIQUE LATINE

Résumé

Cet article porte principalement sur l'emploi des femmes dans les zones rurales et sur ses conséquences pour garantir la subsistance. Cette présentation communique en outre des informations sur les différentes stratégies de travail que l'on rencontre dans les campagnes : emploi temporaire, emploi rural non agricole et emploi rural permanent. La réduction de la pauvreté et ses conséquences pour les familles, ainsi que ses implications concernant la croissance économique des zones rurales entrent aussi en ligne de compte dans cette analyse de l'emploi des femmes dans les campagnes.

In Latin America and the Caribbean, rural women make up almost half of the rural population and are key contributors to food production. According to the roles assigned to them by society, women have been almost solely responsible for the reproduction of their families, assuring that they are fed and clothed. Women have developed many subsistence strategies under conditions of extreme poverty occurring in rural areas and in marginal urban sectors in the region.

Government policies in favour of gender equality have considered especially the social position of women, compensatory policies, and their condition of poverty and high vulnerability. Policies have stressed women's social vulnerability, but not their role as economic players. Advances in gender inclusion policies have had a strong reproductive, family and social slant, with limited possibilities to influence the productive and economic fields.

Today, there is a new scenario in Latin America: a new rurality, with changes in the rural job market that show articulation of women into new forms of productive work; and the compatibilisation with reproductive, family and social roles. Data show that most rural women are still concentrated in small agricultural units, which function at a subsistence level, with severe restrictions of access to productive resources that would allow them to improve their life situations.

These policies have had multiple effects on rural and urban employment, benefiting mainly the modern export sector. In the rural sector those who have benefited least are those from the poorest sectors with least access to land and

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capital. This has particularly affected women because of the effects of industrialisation; the market-orientation of agriculture; and migration, when women have had to assume responsibility for both family and home. This situation is resulting in rural and urban low-income families' increasing dependence on cash receipts to cover their needs, including food. In this context, rural women have needed increasingly to diversify their livelihoods through, for example, migration or seeking agricultural and non-agricultural jobs.

This situation, and the current rise in food prices, has a negative impact on a family's basic food budget. In its poverty projections for Latin American countries (2007) ECLAC announces that 'a 15% increase in food prices raises poverty incidence by three percentage points, from 12.7% to 15.9%. This means that the price increase will force 15.7 million of Latin Americans into indigence.'

Rural women, employment forms and education needs

Women have been particularly affected by world trends: the opening-up of borders, the terms of international trade and the faster growth of trade knowledge and flows, from which most of them have been excluded. The number of women participating in the world labour market is the highest ever, but women are more exposed than men to low productivity, poorly-paid and unstable jobs, without social protection or rights, according to a report unveiled today by the International Labour Organization (ILO).

Currently, labour entry of rural women from the region is growing in new agricultural and non-agricultural work. Women's employment may take different forms: either a steady job (wage-earners) or a temporary one (Rural Agricultural Employment – RAE), or working in non-agricultural positions but living in rural areas (Rural Non-Agricultural Employment – RNE). It is worth mentioning that in recent years a new employment form has developed, in which urban women work in the agricultural sector, having steady or temporary occupations.

Women are more involved in subsistence production than in large-scale agriculture, but the region has seen an increasing number of women going to agricultural export activities which bring them better wages than traditional agriculture.

Nevertheless, the quality of employment can be influenced by the specific situation of women in relation to education level, health, land-ownership (owners, tenants, cooperative), land access and family responsibilities, which play an important role when deciding which member of a poor family will go

to work. Trends such as an ageing rural population, male:female ratios which differ from those in cities, different migration rates according to gender, and family composition are all taken into consideration when deciding who enters the job market.

Low levels of education and healthcare are barriers to rural women obtaining jobs with better salaries. Policy development must recognise these obstacles. Other aspects, such as women's dwellings and other assets, can serve as indices of the advancement of the living condition of rural women.

Several studies assert that superior levels of education, healthcare and nutrition mean better chances of finding a job. Women without skills (education level lower than required) have less chance of finding well-paid jobs than skilled women with at least basic levels of formal education, short-term or long-term training, or some kind of specialisation.

Which proposal can better the situation of women seeking jobs or paid work?

There is a consensus about the need to adapt the school curriculum to country realities that will motivate young people to stay in rural areas, as well as to facilitate the access of young people to natural resources. On the other hand, adult education should be promoted, because it will give specific technical knowledge to women trying to access more demanding employment markets. In the case of women involved in any revenue-generating activity, experience says that to be successful women need to acquire business administration and management knowledge.

What do we do with women at indigence level?

Responses to this question are not unanimous. Some propose different public funding strategies, including school subsidies (*entre otros México con el Programa "Oportunidades"*), while others are against subsidies and strongly advocate functional training for integration into the labour market.

The field of study of rural employment is a large one, and agricultural activities are exposed to different factors like biological cycles, weather, task disparities, crop calendar, and capital and work factors.

To finish, a provocative thought

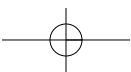
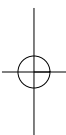
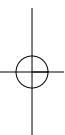
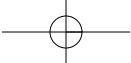
If participation of women in the labour market, on equal terms with men, is a key element to achieve gender equality, as well as the elimination of rural poverty, how can we influence the design of strategies and policies that contribute to the promotion of equality of opportunities in rural employment?

Marcela Ballara's main areas of work are the formulation of national policies and strategies for gender specific needs for women and men, adult education, curriculum development, demography (migration), rural development, research, mainstreaming gender into government, international institutions and civil society organisations. She has participated in major UN conferences of the decennium in advocacy and lobbied for gender issues. She is also part of several gender global network and civil society organization where she has participated as panelist, organising seminars, workshops and other training activities addressed to women and men. Marcela has been working in the United Nations at international and regional level in Sub-Saharan Africa, Central Europe, Latin America and the Caribbean regions, developing and implementing field projects, research, and negotiating with governments.

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Paul Bélanger, Chris Duke and Heribert Hinzen

POLICY, LEGISLATION AND FINANCING FOR ADULT EDUCATION

Abstract

Adult learning is now widely seen as a basic human right (the right to learn) and lifelong learning is similarly recognised. Adult learning within a lifelong learning concept has an agenda far wider than just employability skills. Yet educational inequalities between and within nations remain stark, as does the gap between rhetoric and practice in terms of policies and structures, legislation and finances for adult education. Renewed commitment and effective action in line with lifelong learning policies are required from all parties, to achieve the progress urgently needed across formal, non-formal and informal dimensions of adult learning.

POLÍTICA, LEGISLACIÓN Y FINANCIAMIENTO PARA LA EDUCACIÓN DE PERSONAS ADULTAS

Resumen

El aprendizaje de personas adultas se ve cada vez más como un derecho humano básico (el derecho a aprender), y el aprendizaje a lo largo de toda la vida recibe un reconocimiento similar. El aprendizaje de personas adultas, dentro del concepto de

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aprendizaje a lo largo de toda la vida, tiene una agenda mucho más amplia que sólo las habilidades de empleabilidad. No obstante, las desigualdades educativas entre las naciones y dentro de cada una de ellas siguen siendo severas, al igual que la brecha entre la retórica y la práctica en términos de políticas y estructuras, legislación y finanzas para la educación de personas adultas. Se requiere un compromiso renovado y una acción efectiva de todas las partes, en concordancia con las políticas de aprendizaje a lo largo de toda la vida, para lograr los avances que se necesitan de forma urgente en las dimensiones formal, no formal e informal del aprendizaje de personas adultas.

POLITIQUE, LÉGISLATION ET FINANCEMENT DE L'ÉDUCATION DES ADULTES

Résumé

L'éducation des adultes est à présent considérée d'une manière générale comme un droit élémentaire de l'homme (le droit à l'éducation), et il en va de même de l'apprentissage tout au long de la vie. Comprise dans ce dernier concept, le calendrier de l'éducation des adultes dépasse de loin la simple acquisition de compétences nécessaires à l'employabilité. Toutefois, de grosses inégalités existent encore entre les nations et à l'intérieur de celles-ci dans le domaine de l'éducation : par exemple le fossé qui sépare la rhétorique et la pratique en matière de politiques et de structures ou de législations et de financements de l'éducation des adultes. Un engagement renouvelé et une action réelle, conformes aux politiques d'apprentissage tout au long de la vie sont nécessaires de la part de tous les acteurs pour réaliser les progrès absolument nécessaires dans les domaines formels, non formels et informels de l'éducation des adultes.

The ICAE Executive decided in its last meeting that as one of the thematic contributions to the next UNESCO World Conference on Adult Education in Brazil 2009 (CONFINTEA VI), policy, legislation, and financing are of great importance from a civil society, as well as a professional perspective.

1. Education and training for youth and adults as part of lifelong learning

1.1 It is widely accepted that adult learning within lifelong learning is a key factor for economic and social development, as well as being a human right. New policies for adult learning should result in coherent legislation, and laws which clearly spell out ways and means for financing adult learning activities, involving public, private and civil society agencies as well as the individual.

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1.2 Taking into account the vast transversal social demand for adult learning across all sectors of human activities and throughout adult life, adult learning then becomes predominant on national educational scenes. One wonders, then, why it takes so much time to readjust the education policy environment to this changing reality.

1.3 There are strong arguments for adopting a two-pronged approach in the development of a national and international lifelong learning policy framework: first, formal initial education, general and vocational, including preschool education, and second, adult learning that includes adult literacy and basic education, work-related adult learning and training, and social and cultural adult learning. Both are important, both for the individual and for society.

1.4 Adult learning provision in most countries is, however, insufficient either in quantity or in quality to meet the social demand. Often the statistical monitoring remains out-of-date and too limited in scope to fully observe the situation. All countries face similar challenges: how to increase and sustain participation rates; how to stimulate the motivation of prospective learners; how to shape a system of adult learning and training for youth and adults; and how to create conditions which will ensure higher levels of participation and fairer opportunities for all citizens.

1.5 As higher adult participation is required to enhance and expand human potential, and to allow each citizen to participate fully in her or his community, special attention has to be paid to those who are excluded: those who did not have the conditions to be successful in school and vocational education; those who could not attend schools in the first part of their life; women who, doubling up as workers and caretakers for family and children, lack sufficient time; households where the low level of income makes it financially impossible, etc.

1.6 How can people continuously improve their skills and knowledge, and thus ensure better their right to work, without providing continuous high quality general and vocational training for youth and adults, and without the conditions for people to participate therein? How can we support people's mobility without providing language and intercultural skills training? Adult learning within a lifelong learning concept fosters active citizenship, strengthens personal growth and secures social inclusion, thus going far beyond employability skills. Our lifelong learning project includes all of these.

2. Why does adult learning not get the support that it deserves?

2.1 Governments almost without exception have initial education policies for schools and higher education. Usually there is legislation for both, with

financial provision, though often not enough. As confirmed in the last UNESCO World Report, the situation has improved, but still nearly one hundred million children do not have access to initial education, and a majority of people hardly finish their basic education

2.2 On the adult learning scene, the situation is critical: lack of adult learning policies, limited resources allocated. Moreover a global social divide tends to emerge, with lifelong learning in the first and second world, whereas the third world struggles with meagre resources even to ensure basic adult literacy provision.

2.3 Part of the difficulty is said to be the complexity of what is described as the adult education and training scene: there are so many players, none of which wants to be regulated or controlled by others. Yet why should learning among older people suffer such severe constraints in the lifelong learning era?

2.4 There is much evidence to show that participation rates in adult learning tend to be higher among adults with higher initial education. Those better qualified are more likely to continue upgrading knowledge and skills via adult continuing education lifelong, at least throughout their working lives. Policy and legislation, good organisation and adequate finances are needed to support a change, so that non-participants in adult education and training, who also tend to be the under- or unemployed, get special support.

2.5 Lifelong learning, including all forms of education and training at all levels, is an essential tool for the improvement of employability as well as of active and creative citizenship. Bridges are needed between formal and non-formal education institutions and agencies. Each provider should play an appropriate role: public and private schools, colleges and universities, voluntary bodies, companies, vocational training centres. Policy debate should centre much more on investment in people and their education by governments, employers and the learners themselves. Governments need to consider the education of adults more as an investment rather than merely a cost. More innovative mechanisms for learners' accounts, loans and saving schemes should be piloted and evaluated.

2.6 No one kind of institution can manage all this alone. We have and need a mix of contributions from different sources. A substantial proportion of resources may be essential from government and public sources, only partly because most taxpayers are adults. A more diversified and inter-ministerial approach to policy and resources in the education sector is needed, making it a wider shared public responsibility to support adults' learning. Partnership and cost-sharing are essential.

2.7 Usually adults already contribute as individuals via fees. Not all courses can cost the same; some should be free, or subsidised for certain

groups. Within the private sector many companies see the further education and training of their employees as an investment in their human resources. The investment may not be high enough, and it is commoner among larger companies. The small and medium enterprise sector does very little. Privatising adult education financing has unavoidable limits, even though individual and company contributions have always provided a significant share. A regulation of the *market* is needed to ensure accessibility, relevance and quality.

2.8 Many different models for financing adult education have recently appeared in different countries. The consensus, looking at the social demand and the available responses, is that at least a basic level of public funding is essential to achieve accessibility and the necessary quality. Some favour funding the individual more directly, through grant schemes and learning accounts.

2.9 What are the implications for the policy, organisation and financing of adult learning and training? What sort of structural support is needed? Is it more financial input to the providing institutions, more incentives for the individuals, or a mix of both?

3. What kinds of support structures should governments provide?

3.1 As our societies move through this era of globalisation there is a dearth of clear thinking about the adult learning agenda of the near future. We need a qualified labour force, but what are the qualifications required for the future labour scene? How will it be possible for women and men to voice their own learning needs and aspirations? Often we re-train unemployed adults for jobs that disappear. Who knows best which adult education and training programmes will anticipate and not merely follow labour market changes, including mastering the information technologies successfully?

3.2 We need government involvement in adult learning as much as in other parts of the education system, and across all dimensions of adult learning, going beyond policy, legislation and financing to include support to informal and self learning, and the recognition of prior and experiential learning. We need much more acceptance of government's role in supporting non-governmental (NGO) providers in adult education and other community-based organisations (CBO). These represent a world of diverse situations and needs, especially of excluded groups and neglected issues: from civic and environmental concerns to business-oriented training, from farmers' associations to workshops on gender mainstreaming, courses run by churches and trade unions. Many reach where neither government nor employers can reach. In total this activity amounts to much more than any government does or could do. NGOs need full recognition, respect and often support.

3.3 The role of universities is changing. Many are becoming lifelong learning institutions, not always consciously. The range of post-graduate degrees and diplomas is ever wider. Universities need to think of community engagement and not just individual students. A new balance is needed between older extramural work and the many new academic studies for adult students. As universities' role in adult learning continues to widen, the concept and practice of lifelong learning should be at the heart of policy and mission, not left to an often peripheral unit. More research is needed to develop adult learning and adult education as a strong academic discipline, for upgrading teaching and supporting staff, and to prepare future generations of adult education professionals.

3.4 In terms of trans-national analysis and benchmarking, indicators are now being developed. This is difficult to do, especially going beyond the more formal and institutionalised providers. It is important to support the development of a more comprehensive system to collect relevant statistics nationally as well as globally, as a basis for monitoring performance and developing policy and even legislation.

4. What can we learn from recent developments and experiences?

ICAE is far from alone in advocating improvement in this complex area of policy, legislation, and financing. In preparation for the *Education for All Global Monitoring Report 2008*, some 25 papers were commissioned on non-formal education (NFE) in a variety of countries. Four lead questions were posed for each country (see www.efareport.unesco.org):

- How is NFE conceptualised?
- What are the legal foundations for NFE policies?
- How are NFE programmes governed and financed?
- How is NFE supported and managed?

5. Outputs expected from the virtual seminar

5.1 We expect contributions that are important for all areas of adult learning, non-formal, formal or informal, including a more general or vocational education or re-training perspective. Attention may be given to new forms of e- and blended learning. Different dimensions and responsibilities of governments, stakeholders, providers, and learners should be included. The virtual seminar should therefore encompass a wide geographical and political spread, and include governmental, NGO and private sectors, national and the local levels, and professional service institutions.

5.2 Inequality remains very central. Despite policy, legislative and financial attention to equal opportunities for women as well as for men, and for disabled persons and different minorities, there is still inequality. We need to document this reality, analyse the reasons, and suggest changes, no doubt including special financial support. As important, is the participation of civil society in the formation of future policies.

5.3 The seminar aims to collect information on policies and legislation, structures of organising, and the financing of adult learning. Interesting models have been developed by governments, by NGOs and CBOs, and by all sorts of other providers. There are frameworks for smaller and larger companies, for successful learners as well as returning dropouts, funds or saving accounts for financing education, schemes for tax reduction and for investments in education, and efforts to relate different legislative requirements closer to what a system of lifelong learning requires. There is growing interest in viewing adult learning as both an investment and a right. However, knowledge is still limited about the resources needed and how they are best provided, how the adult education sector works in all member countries, and what works best.

Invitation

Colleagues who are interested to contribute to the virtual seminar are invited to get in contact with the ICAE Secretariat. Please send us your ideas, suggestions, opinions, research results, materials and documents.

Later we will decide how to include contributions and findings in the ICAE document for the regional pre-conferences in 2008 and the global CONFINTEA VI in Brazil in 2009.

Paul Bélanger is the President of the International Council for Adult Education. He is Professor at the Université du Québec à Montréal and Director of the CIRDEP (Centre interdisciplinaire de recherche et développement sur l'éducation permanente), a research centre on lifelong learning. He was Director of the UNESCO Institute for Education from 1989 to 2000. In that capacity he was the General Secretary of the Fifth International Conference on Adult Education – CONFINTEA V – held in Hamburg in 1997. Mr Bélanger has published extensively on adult education in industrialised countries, on literacy and adult education in Africa, on the transition of educational systems towards lifelong learning, on international monitoring of adult education participation and adult learning policies.

Professor Chris Duke has worked in the field of adult non-formal education for development from the base of different UK and Australasian universities, especially with and for ASPBAE and ICAE, DVV-IIZ and UNESCO, since the early 1970s. His other main area of main professional work relates to the engagement of universities with their societies, in contributing to balanced social and economic development.

Prof.(H) Dr. Dr. h. c.(H) Heribert Hinzen is the Director of DVV International, the Institute for International Cooperation of the German Adult Education Association. He is Vice-President of the European Association for the Education of Adults (EAEA) and of the International Council for Adult Education (ICAE), and a member of the CONFINTEA VI Consultative Group and the UN Literacy Decade Expert Group. He was among the German delegation at the World Education Forum in Dakar and contributed to the EFA Global Monitoring Report 2006. Contact: hinzen@dvv-international.de Address: DVV International, Obere Wilhelmstr. 32, D – 53225 Bonn, Germany

David Archer

FINANCING OF ADULT EDUCATION

Abstract

The 2008 EFA Global Monitoring Report recognises adult literacy as the most neglected of the EFA goals. It is neglected most obviously in respect of the financial allocations made by governments and donors. This shortage of financing creates a dangerous situation in which adult educators seek to convince politicians to invest, based on false promises of quick wins at low cost. Yes, research (eg Writing the Wrongs, gce 2005) shows that the key to success is sustained investment in an ongoing learning process. Governments should be investing 6% of their education budgets on adult education and half of that should go to basic literacy. Governments need to include adult literacy in education sector plans and demand support for adult literacy from the Fast Track Initiative. Adult educators also need to link with other constituencies (HIV, health, wider education campaigners) to challenge IMF macro-economic conditions that undermine investment in the public sector as a whole. We should use the build up to CONFITEA to make the case for new investment in adult education and to popularise simple reference points against which we can monitor the performance of governments and donors.

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FINANCIAMIENTO DE LA EDUCACIÓN DE PERSONAS ADULTAS

Resumen

El Informe de Seguimiento 2008 de EPT reconoce que la alfabetización de personas adultas es la más desatendida de las metas de EPT. Está desatendida, evidentemente, con respecto a la cuantía de las dotaciones financieras realizadas por los gobiernos y los donantes. Esta escasez de financiamiento crea una peligrosa situación en la que los educadores de personas adultas intentan convencer a los políticos para que inviertan, basados en falsas promesas de rápidos resultados positivos a un bajo costo. Investigaciones (por ej. Corregir los Errores, gce 2005) muestran que la clave del éxito es una inversión sostenida en un proceso de aprendizaje en curso. Los gobiernos deberían invertir 6% de sus presupuestos para educación en la educación de personas adultas, y la mitad de eso debería destinarse a la alfabetización básica. Los gobiernos necesitan incluir la alfabetización de personas adultas en planes del sector educativo y solicitar apoyo para la alfabetización de personas adultas a la Iniciativa de Vía Rápida. Los educadores de personas adultas necesitan también vincularse con otras comunidades (VIH, salud, activistas por la educación en extenso) para desafiar las condiciones macroeconómicas del FMI que obstaculizan la inversión en el sector público en su conjunto. Deberíamos utilizar el desarrollo de la CONFINTEA para obtener nuevas inversiones para la educación de personas adultas y popularizar simples puntos de referencia contra los cuales podemos monitorear el desempeño de los gobernantes y los donantes.

FINANCEMENT DE L'ÉDUCATION DES ADULTES

Résumé

Le rapport mondial 2008 de suivi sur l'EPT admet que l'alphabétisation des adultes est l'objectif le plus délaissé de l'EPT. Il a le plus manifestement été négligé au point de vue des financements attribués par les gouvernements et les bailleurs de fonds. Ce manque de financements crée une situation dangereuse dans laquelle les éducateurs d'adultes cherchent à convaincre les politiciens d'investir en leur faisant miroiter des bénéfices rapides à peu de frais. Oui, la recherche (ex.: Writing the Wrongs: International Benchmarks on Adult Literacy (Corriger les erreurs: Normes internationales de l'alphabétisation des adultes), Campagne mondiale pour l'éducation, étude parue en 2005) montre que la clé de la réussite passe par un investissement soutenu dans un processus d'apprentissage permanent. Les gouvernements devraient investir 6 % de leurs budgets de l'éducation dans l'éducation des adultes et la moitié de ce pourcentage devrait être allouée à l'alphabétisation de base. Les gouvernements doivent inclure l'alphabétisation des adultes dans les plans du secteur de l'éducation et demander dans ce domaine l'appui de l'Initiative Fast Track pour la mise en œuvre accélérée du programme d'EPT. Les éducateurs d'adultes doivent quant à eux s'associer à d'autres secteurs (VIH, santé, organisateurs de campagnes d'éducation plus larges) pour faire face aux conditions macroéconomiques du FMI qui ébranlent

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l'investissement dans le secteur public en général. Nous devrions utiliser cette période de préparation de la CONFINTEA pour défendre la nécessité de nouveaux investissements dans l'éducation des adultes et populariser des critères de référence simples qui nous permettraient de surveiller les prestations des gouvernements et des bailleurs de fonds.

The 2008 EFA Global Monitoring Report¹ recognises adult literacy as the most neglected of the EFA goals. It is neglected most obviously in respect of the financial allocations made by governments and donors. Since the last CONFINTEA meeting in 1997, there has been little or no investment in adult education across Africa, Asia and Latin America. Where funds are available for adult education they are most likely to find their way into adult literacy programmes but even these are desperately under-funded.

This shortage of financing creates a dangerous situation in which adult educators seek to convince politicians to invest, based on false promises of quick wins at low cost. The spectre of short-term literacy campaigns reappear – with promises that mass literacy can be achieved within 30 days or six months. Most experienced practitioners now recognise that continuity of learning over at least two or three years is required to make a real impact, but this knowledge is inconvenient in trying to bid for scarce resources.

The International Benchmarks on Adult Literacy² which were derived by the Global Campaign for Education (GCE) from a survey of 67 effective adult literacy programmes across 35 countries, put the likely cost of running a good quality adult literacy programme as somewhere between US \$50 and \$100 per learner per year, for at least three years. Many organisations claim they can run programmes cheaper, but to sustain an effective programme requires paying facilitators and ensuring that they have good quality training and access to professional development. It does none of us any favours if we offer cheap alternatives which do not achieve quality results that can be sustained.

These same GCE Benchmarks recommend that: 'Governments should dedicate at least 3% of their national education sector budgets to adult literacy programmes as conceived in these benchmarks. Where governments deliver on this, international donors should fill any remaining resource gaps (e.g. through including adult literacy in the Fast Track Initiative)'.

This recommendation was based on the idea that governments should spend 6% of their education budgets on adult education and half of that should go to basic literacy. It is difficult to find objective reference points to substantiate these percentages but it is clear that at present most governments are spending under 1% of national education budgets on adults and often only a small

fraction of 1%. We need to popularise something as a reference point for governments and the 6% for adult education/3% for adult literacy seem to be figures that have most momentum.

In respect of donors, they have singularly failed to deliver on the resource promise made in Dakar in 2000 that any government with a viable plan to achieve education for all will not be allowed to fail for lack of resources. The promise was rapidly converted into one that focused resources only on universal primary schooling through the setting up of the EFA Fast Track Initiative in 2002. The reductionism of the EFA agenda was clearly driven by the World Bank, as indeed it had been after Jomtien. There is something grotesque in the very title of the EFA FTI – it occupies the full EFA space for mobilisation of donor resources and yet channels funds only into primary schooling.

Many of us have been challenging the FTI over recent years to recognise this contradiction and we are finally making some progress. Burkina Faso and Benin have both had education sector plans endorsed by the FTI which include significant components of adult literacy. But this message has not gone out more generally and the FTI secretariat has still failed to communicate this to countries coming up for endorsement. Nevertheless, as campaigners for adult education we should be getting the message out loud and clear to all governments that FTI can support adult literacy...if national governments include adult literacy as a priority in their sector plans.

There is, however, a wider problem on financing of education that overshadows even the poor performance of the donors. That is the macro-economic policies of the IMF which seek to maintain 'stability' through unnecessarily restrictive policies, especially low inflation targets and low deficit targets – that prevent countries from increasing spending on education. Until recently, half the countries with an IMF loan agreement were subject to an explicit cap on their public sector wage bill. The largest group paid for out of this public sector wage bill are teachers (and health workers are the second largest group). If you have a cap, you have to freeze teacher salaries and you cannot employ new teachers even if you have millions more children in your schools. And obviously you cannot even think of starting to pay adult literacy facilitators or adult education tutors. In the face of IMF policies it is almost impossible for countries to make significant new investment in education.

One of the root causes of the problem is the short-termism of the IMF everything depends on three- to five-year 'medium term expenditure frameworks'. If you are looking over such a timeframe everything you spend on education is pure consumption money down the drain. If, however, you take a longer-term view, over ten years, spending on education is not just

consumption but rather a sound economic investment which will contribute massively to national development.

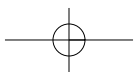
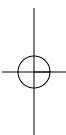
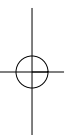
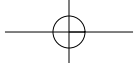
If we want to make the case for more investment in adult education we need to join forces with civil society campaigners who are challenging their Ministries of Finance to prevent the IMF from imposing their outdated ideology. It is for national citizens to demand accountability from their own governments around any agreement signed with the IMF and this is not as hard as it sounds. It makes sense for us as education campaigners to link with HIV and health campaigners to make this wider case because without a change in the big financing picture, there will always be a scarcity of resources for education...and when funding is in short supply, adult education tends to be the first victim.

We should use the build up to CONFINTEA to make the case for new investment in adult education and to popularise simple reference points against which we can monitor the performance of governments and donors. Brazil, the hosts of CONFINTEA are one of the few countries that have recognised the importance of investing in adults and we should use this as an example to inspire others.

David Archer is Head of Education at ActionAid International. In the 1980s he worked on literacy programmes across Latin America inspired by Paulo Freire (Literacy and Power: the Latin American Battleground, Earthscan 1990). In the 1990s he was involved in developing the Reflect approach to adult learning, co-authoring The Reflect Mother Manual (1996) and Communication and Power (2003) (see www.reflect-action.org) and later developing the International Benchmarks on Adult Literacy (see Writing the Wrongs 2005). David now supports coalitions and campaigns on the right to education across Africa, Asia and Latin America. A major concern in the past three years has been challenging the role of the IMF in constraining spending on education. In 2006 he was part of an External Panel reviewing the World Bank's investment of \$14 billion in education since 1990. He is a co-founder and International Board Member of the Global Campaign for Education and co-chair of the Commonwealth Education Fund. His next book is called The Politics of Prevention (Pluto Press 2008) and addresses the global crisis in HIV and education.

Notes

- ¹ http://portal.unesco.org/education/en/ev.php-URL_ID=49591&URL_DO=DO_TOPIC&URL_SECTION=201.html
- ² <http://www.campaignforeducation.org/resources/Nov2005/1.%20Writing%20Wrongs%20Literacy%20Benchmarks%20Report.pdf>



Berni Brady

ADULT EDUCATION: PRIORITY AREAS FOR INVESTMENT AND DEVELOPMENT

Abstract

Lifelong learning for all is a key priority for the International Council for Adult Education and should be for national governments across the world. In order to make this a reality, policies need to be developed based on the concept of education as a human right. The policy framework in Ireland is based on three key principles, Equality, Interculturalism and a Systemic Approach to lifelong learning. However policy frameworks are only effective if they are underpinned by legislation and have firm implementation plans supported by adequate resources. Only then can outcomes and progress be measured. Berni Brady writes about the priorities for lifelong learning in Ireland following the publication of the White Paper, Learning for Life published in 2000 and what still needs to be done to make lifelong learning a reality.

EDUCACIÓN DE PERSONAS ADULTAS: ÁREAS PRIORITARIAS PARA INVERSIÓN Y DESARROLLO

Resumen

El aprendizaje a lo largo de toda la vida para todos es una prioridad clave para el Consejo Internacional de Educación de Personas Adultas y debería serlo para los gobiernos nacionales en todo el mundo. Para que esto sea una realidad, las políticas deben desarrollarse sobre la base de la educación como un derecho humano. El marco político en Irlanda se basa en tres principios clave: Igualdad, Interculturalismo y Enfoque Sistémico para el aprendizaje a lo largo de toda la vida. Sin embargo, los marcos políticos sólo son efectivos si están apuntalados por la legislación y cuentan con firmes planes de implementación apoyados por recursos adecuados. Sólo entonces pueden medirse los resultados y los avances. Berni Brady escribe sobre las prioridades para el aprendizaje a lo largo de toda la vida en Irlanda siguiendo la publicación del Documento Oficial, Aprendizaje de por vida, en el año 2000, y qué es lo que aún hay que hacer para que el aprendizaje a lo largo de toda la vida sea una realidad.

LES DOMAINES PRIORITAIRES D'INVESTISSEMENT ET DE DÉVELOPPEMENT EN MATIÈRE D'ÉDUCATION DES ADULTES

Résumé

L'apprentissage pour tous tout au long de la vie est une des principales priorités du Conseil international de l'éducation des adultes, de même qu'il devrait l'être pour les gouvernements de par le monde. Afin que cette idée devienne réalité, il faut concevoir des politiques reposant sur le concept de l'éducation en tant que droit de l'homme. En Irlande, le cadre politique repose pour cela sur trois principes essentiels: égalité, interculturalisme et approche systémique de l'apprentissage tout au long de la vie. Néanmoins, les cadres politiques ne peuvent être efficaces que s'ils reposent sur une législation et de solides projets de mise en œuvre soutenus par des ressources adéquates. Ce n'est qu'une fois ces conditions réunies qu'il est possible de mesurer des résultats et progrès. L'article de Berni Brady porte sur les priorités données à l'apprentissage tout au long de la vie en Irlande à la suite de la publication en 2000 du livre blanc intitulé Learning for Life (apprendre pour la vie). Il expose aussi ce qu'il reste à faire pour que l'apprentissage tout au long de la vie devienne une réalité dans ce pays.

In Ireland a key policy framework for adult and community education was published in the White Paper *Adult Education: Learning for Life* 2000. The paper is based on three key principles: equality, interculturalism and lifelong learning as a systemic approach. These core principles underpin policy development and funding.

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A systemic approach recognises that the interfaces between the different levels of education provision, and the quality of early learning have a critical influence on learners' motivation and ability to access and progress in adult education and training. This requires that educational policies must be designed to embrace the life cycle, reflect the multiplicity of learning sites, both formal and informal and provide for appropriate supports such as guidance, counselling and childcare, and for mechanisms to assess learning independent of the context in which it occurs.

Equality of access, participation and outcome for participants in adult learning must be a core principle, with proactive strategies to erase barriers arising from differences of socio-economic status, gender, ethnicity and disability. Targeting investment at those most at risk is a key priority in promoting an inclusive society.

The need to frame policy and practice in the context of serving a diverse population with the development of curricula, training, materials, modes of delivery and assessment which reflect this diversity must be the norm. This involves not only combating racism and ensuring participation of immigrants, refugees and asylum seekers in education but also the inclusion of minority groups such as travellers, people with disabilities, older adults, women and isolated rural men, for example.

Key messages

- Measures to improve levels of education and training among adults with a view to growing the economy and creating a skilled labour force should be supported.
- Measures to promote adult education and training in support of an inclusive and cohesive society and the fostering of active citizenship should be supported.
- Spending on adult education as a percentage of the overall education budget, should be increased from its current level of approximately 2% to at least 10% going forward, to reflect the scale and impact of the sector.

Coordination and direction of adult education

Political and executive leadership is required to drive and develop the adult education agenda coherently. Coordinating structures are needed to ensure the development of adult education in line with the changing needs of society and the economy. Therefore:

- A centralised unit or council at national level, which would oversee and coordinate developments in adult education, is urgently needed. This council would foster inter-agency work and collaboration among provider organisations in a diverse sector. In Ireland such a body, the National Adult Learning Council (NALC), was set up in 2002 but subsequently suspended. This has created an enormous gap in the leadership and direction of adult education. As a result of the lack of coordinating structures, programmes have developed in a parallel rather than an integrated way resulting in a lack of coherent policy development and cross-departmental communication and implementation of policies.
- Local coordinating structures are also required to oversee developments in adult education at local level and to engage all relevant stakeholders.

Professional development and adult education

The White Paper recognised the need for staff and career development within adult education. Mechanisms to achieve progress in this area were recommended. These included:

- an inter-agency working group to examine the issue of qualifications for practitioners in the adult education sector and to address any training needs
- a forum for practitioners in adult education, to encourage peer support and the sharing of good practice and innovation in the field.

Neither of these structures has been established, and action should be taken to ensure that these or similar structures are introduced in the immediate future. This will facilitate the ongoing development of a professional and efficient body of adult education practitioners.

Work-based learning

Work-based learning initiatives need to be expanded as a priority. As we strive to create a learning economy, with ever more highly skilled jobs, more and more individuals need to access education opportunities through their work. In the context of full-employment:

- A funding model for the support of workers into education and training should be developed. That model should involve cooperation between the State, employers, trade unions and the individuals themselves, as all four parties will be ultimate beneficiaries.

- Currently adults who study in higher education on part-time or modular basis have to pay full fees while traditional full-time students do not. Parity of esteem needs to be given to part-time learners who are almost always adults. Waiving fees for this group means they could access learning while, at the same time, remaining active in the workforce.
- Ireland is one of the only countries in the EU 15 where paid educational leave is not a statutory entitlement. Leave is at the discretion of employers. This situation should be changed to further encourage employees to take up educational opportunities. Employers and the economy as a whole would benefit from this approach in the medium- to long-term.

Adult literacy

The 1997 International Literacy Survey found that 500,000 Irish adults had the lowest level of literacy, about 25 per cent of our adult population. Investment in a National Adult Literacy Programme has since increased substantially. However, according to the National Adult Literacy Agency, the Literacy Programme reaches only about 6 per cent of the overall target group. AONTAS recommends that:

- a review of the National Adult Literacy Programme should be carried out to assess the impact of spending to date and assess current literacy needs among the adult population
- resources to the Adult Literacy Programme should be substantially increased
- due to our recent in-migration levels, Ireland's literacy service now copes with large numbers of non-nationals seeking to learn the English language. Spending on ESOL (English for speakers of other languages) now accounts for a large proportion of the adult literacy budget. Yet no additional funding has been allocated to the National Adult Literacy Programme to support this work and so the budget is spread more and more thinly. ESOL provision, critical to supporting both the Irish economy and society, must be properly developed and resourced in the immediate future.

Education in the community

Many adult education opportunities at local level are provided by community and voluntary groups. These groups offer supportive, non-formal routes back into education and the workforce to the most disadvantaged and poorly educated in society. AONTAS estimates that 30,000 to 40,000 people

participate in community-based education initiatives. In the interests of supporting this valuable work and allowing it to expand and develop, we seek:

- multi-annual funding for community development groups and other voluntary education groups, to encourage stability for learners and facilitate longer-term planning
- integration of supports for adult learners into all programme funds allocated to local groups, for example, childcare and transport costs which pose considerable barriers to potential learners and are not currently incorporated into all education programme funds
- dedicated funding for women's community education, in recognition of its unique role in promoting three agendas; namely lifelong learning, social inclusion and gender equality.

Berni Brady is Director of AONTAS, the Irish National Adult Learning Organisation. Her career in adult and community education spans 30 years of work in adult literacy, adult and community education, campaigning, leading new developments, training, research and working with adult learners. Under her leadership AONTAS played a key role in the development of the White Paper and the implementation of its recommendations. She is a graduate of Queens University Belfast and National University of Ireland, Maynooth.

Heribert Hinzen

CONFINTEA VI – THE UNESCO INTERNATIONAL CONFERENCE ON ADULT EDUCATION IN THE CONTEXT OF MDGS, EFA, UNLD, LIFE AND DESD

Abstract

This paper looks at the context in which preparations are under way for CONFINTEA VI, the next UNESCO International Conference on Adult Education. The last CONFINTEA was in 1997, and ever since, a series of international conferences and initiatives dealing with adult and continuing, non-formal and out-of-school education, literacy and basic education, have been taking place in parallel, frequently complementing each other. Unfortunately, this attention has not yet attracted a high level of financial support, either nationally or internationally. However, it must be acknowledged that after a serious decline in the support given to education in development generally, the situation seems to be improving. The example of policy-making in the area of adult and lifelong learning by the European Union may also stimulate developments at the international level.

CONFINTEA VI – LA CONFERENCIA INTERNACIONAL DE LA UNESCO SOBRE LA EDUCACIÓN DE PERSONAS ADULTAS EN EL CONTEXTO DE LOS ODM, EPT, DNUA, LIFE, Y DESD

Resumen

Este trabajo analiza el contexto en el que se desarrollan los preparativos para la CONFINTEA VI, la próxima Conferencia Internacional de la UNESCO sobre Educación de Personas Adultas. La última CONFINTEA se realizó en 1997, y desde entonces se han desarrollado, de forma paralela y frecuentemente complementaria, una serie de conferencias e iniciativas internacionales que tienen que ver con la educación, la alfabetización y la educación básica permanente y de personas adultas, no formal y no escolarizada. Desafortunadamente, esta atención aún no ha atraído un alto nivel de apoyo financiero, ya sea nacional o internacional. No obstante, debe reconocerse que luego de una seria disminución del apoyo dado a la educación en el desarrollo de forma general, la situación parece mejorar. El ejemplo de la elaboración de políticas en el área del aprendizaje de personas adultas y a lo largo de toda la vida por parte de la Unión Europea también puede estimular desarrollos a nivel internacional.

LA CONFINTEA VI DANS L'OPTIQUE DES OMD, DE L'EPT, DE LA DNUA/DÉCENNIE DES NATIONS UNIES POUR L'ALPHABÉTISATION, DE LIFE/INITIATIVE POUR L'ALPHABÉTISATION: SAVOIR POUR POUVOIR ET DE LA DEDD/DÉCENNIE DE L'ÉDUCATION POUR LE DÉVELOPPEMENT DURABLE

Résumé

Cet article examine le contexte dans lequel se déroulent les préparatifs de la CONFINTEA VI, la prochaine conférence internationale de l'UNESCO sur l'éducation des adultes. La dernière CONFINTEA a eu lieu en 1997 et depuis, toute une série de conférences et projets internationaux consacrés à l'éducation des adultes, à l'éducation permanente, à l'éducation non formelle, à l'éducation extrascolaire, à l'alphabétisation et à l'éducation de base se sont déroulés parallèlement les uns aux autres, se complétant souvent mutuellement. Malheureusement, l'attention portée à ces domaines ne s'est pas traduite par un grand soutien financier, que ce soit au niveau national ou international. Il faut cependant reconnaître qu'après une période marquée par un déclin sérieux du soutien fourni à l'éducation dans le cadre du développement en général, la situation semble s'améliorer. L'exemple de la politique menée par l'Union européenne dans le secteur de l'éducation des adultes et de l'apprentissage tout au long de la vie aura peut-être un effet stimulant qui produira du nouveau au plan international.

The paper begins with a few brief remarks on the chronology and content of activities to help provide a clearer understanding of the thoroughly confusing

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array of international development decades and education initiatives that have been behind a variety of programmes. We begin with CONFINTEA itself: the most recent conference was held in Germany in 1997, and the next will be in 2009 in Brazil. In 2003, there was a mid-term review in Thailand, and preparatory conferences will be held in five world regions in 2008. In spring 2000, the World Education Forum was held in Senegal, with the stated aim of achieving 'Education for All' (EFA) by 2015. In the autumn of the same year, the 'Millennium Development Goals' (MDGs) were adopted by the UN General Assembly, also to be achieved by 2015. In 2002, the United Nations proclaimed the UN Literacy Decade, doubtless also conceived as a way of reinforcing the aims of CONFINTEA, the MDGs and EFA. LIFE, the Literacy Initiative for Empowerment, then provided further backing for the Literacy Decade. And lastly, there was the proclamation of a 'Decade of Education for Sustainable Development' (DESD) for the years 2005 to 2014. Reason enough to establish a unit at UNESCO Headquarters in Paris to coordinate the various educational 'decades'.

In the individual sections it will become clear that all these initiatives and programmes each have their own justification and their own significance. It will also become apparent that there are points at which they converge or even overlap. In terms of substance, EFA is seen to be considerably more far-reaching than the others since it is the most comprehensive educational initiative and is also – or should be – of greatest relevance to youth and adult education (alongside CONFINTEA).

While we are most concerned here with global developments, we shall not lose sight of specific, and thoroughly encouraging, new departures in Europe, particularly those of the European Union (EU); these will be discussed towards the end. A further section looks at the particular interests, potential and activities of the many non-governmental organisations (NGOs) in the field of youth and adult education, which complement, compensate for and often criticise the provision or lack of it offered by governments and their multilateral organisations.

1. MDGs – Millennium Development Goals: 2000-2015

Development used to be an overall term for change and progress, and was typical of the phase of decolonisation that swept across Africa, Asia and Latin America in the 1950s, '60s and on into the '70s. During that process it soon became apparent that the basic needs of a large majority of the population, '...adequate education, sufficient food, shelter, social security, political and social participation, cultural activity' (Hinzen 1994, 27), were not being met. The period saw the beginnings of development aid, of which educational assistance was intended to be a major component.

The dramatic growth in ever more alarming world crises gave rise to international conferences: dealing with the environment and development in Rio in 1992, with population growth in Cairo in 1994, with social development in Copenhagen, and with women in Beijing in 1995, and with housing in Istanbul and food production in Rome. Almost as a precursor, a World Education Conference was held in 1990 in Jomtien, which made the following appeal in its final declaration:

‘Every person – child, youth and adult – shall be able to benefit from educational opportunities designed to meet their basic learning needs. These needs comprise both essential learning tools (such as literacy, oral expression, numeracy and problem solving) and the basic learning content (such as knowledge, skills, values, and attitudes) required by human beings to survive...’ (cited in Hinzen and Müller 2001, 47).

It was at the United Nations General Assembly in September 2000 that delegates from 189 countries adopted a Millennium Declaration. This formed the basis for the eight Millennium Development Goals formulated a year later:

- 1 Eradicate extreme poverty and hunger,
- 2 Achieve Universal Primary Education,
- 3 Promote gender equality and empower women,
- 4 Reduce child mortality among children under five,
- 5 Improve maternal health,
- 6 Combat HIV/AIDS, malaria and other diseases,
- 7 Ensure environmental sustainability, and
- 8 Develop a global partnership for development’ (Loewe 2005, 11; see also GKKE 2007).

A glance at the MDGs shows that their educational aims are to be found chiefly in Goal 2, ‘Achieve Universal Primary Education’ (with the subsidiary goal No. 3, that all children in the world should be enrolled in and successfully complete primary education by 2015) and Goal 3, ‘Promote gender equality and empower women’ (with the subsidiary goal No. 4, that the imbalance between the genders should be eradicated in primary and secondary education by 2005). The relevant indicators are therefore school enrolment and completion rates.

What has been achieved? In relation to Goal 2, Universal Primary Education, an evaluation of comparative data for 1998 and 2002 shows a clear upward trend in enrolment; on average across all developing countries, this had reached 83% of children, and in Latin America as much as 96%. At the bottom end of the scale was South Asia, with 83%, and sub-Saharan Africa, where only 64% had been achieved. The picture is no better in the case of Goal 3, gender equality, since gender equality in primary school enrolment had been achieved

only in 104 of the 180 countries covered, and in the case of secondary education only in 57 out of 172 countries. It is therefore not surprising that the literacy rate is still lower among both younger and older women, and it can be anticipated that the goal of equality will not be reached even by 2015 (UNESCO 2005a, 41–57; see also Hinzen 2006).

In 2005, the Millennium+5 Summit found in due course that much had been achieved, in education perhaps more than in other fields. However, crucial decisions and binding commitments to increase development assistance by the amounts needed are still lacking, as are a world trade system that supports development and an agreement to renounce the constant renewal of weapons systems by forgoing rearmament.

The people and organisations working for MDG 6, the fight against HIV/AIDS, are therefore correct when they complain that the Global Fund set up by the G8 in 2001 is chronically short of funds. Only 20% of AIDS sufferers receive treatment, although affordable medicines are now on the market.

The voices calling for redefinition of the MDGs themselves should also be taken seriously. These voices argue that the MDGs deal too feebly with the serious disequilibrium in the world (where is the responsibility of the North?) and take a narrow view of development (inadequate environmental sustainability and social justice), with the result that intolerable poverty is tending to spread rather than decline.

Representatives of the International Council for Adult Education (ICAE) also complain that the MDGs lack targets relating to adult education, and that the significance of non-formal youth and adult education as a whole is underestimated. How can the MDGs be achieved in the current decade when well over a billion people are still excluded from basic education?

2. EFA – Education for All: 2000–2015

In international educational cooperation, the early 1990s saw increases – albeit inadequate – in investment in basic education, chiefly in primary education, with the goal of achieving Universal Primary Education (UPE). Rising enrolment rates in State education systems were expected to make the continuing high number of adult illiterates a matter of demography, so that it would ‘grow out’ with the older generation. In practice, equal recognition was not given to in-school and out-of-school basic education for children, young people and adults, and even in the broader perspective, the notion proved a failure. Despite rises in enrolment rates, population growth meant that the number of children not enrolled increased the number of illiterates, which has remained consistently high.

A series of conferences were held, leading up to the World Education Forum in Dakar in April 2000. That for the UNESCO Region of Europe and North America was held in Warsaw in February. Reports from more than 30 countries were combined into one regional report. On the positive side, it was noted that this region had undoubtedly come closest to achieving the Jomtien goals. However, the EFA Framework for Action produced in Warsaw had to admit that 'the past decade has been marked by regressions and difficulties' (cited in Hinzen and Müller 2001, 61), which had affected social development as a whole and had by no means spared the education sector. In response, delegates called for the teaching of key skills as an integral part of basic education, combined with initial occupational guidance, and the teaching of the individual competences required for democratic participation.

Invitations to the World Education Forum were issued jointly by UNESCO, UNICEF, UNDP and the World Bank. It was attended by 1500 participants from some 150 countries, representing governments, UN organisations, development banks, national, regional and international NGOs, coalitions of educational associations, specialist organisations and other educational bodies. The Forum focused on a large number of reports devoted to particular themes, regions or countries. High-ranking individuals – the President of Senegal, numerous Ministers of Education and the Director-General of UNESCO – made striking speeches highlighting the critical situation of education on a world scale. At the end, the President of the World Bank made an appeal to all present: 'It is time to act – we must place education at the centre of development' (James Wolfensohn, cited in Hinzen and Müller 2001, 83); it was also remarkable that he expressly acknowledged the contribution of the Global Campaign for Education (GCE) sponsored by NGOs.

At the World Education Forum, it was once again the worrying statistics – over 133 million children of school age not in school, and 880 million adults lacking reading, writing and numeracy skills – and the generally downward trend in the funding of education, which provoked the question: how can we speak of the key importance of education and human resources for development, if at the same time a billion people are denied minimum education and literacy?

The World Education Forum ended with the adoption of the 'Dakar Framework for Action. Education for All: Meeting our Collective Commitments'. This begins with a pledge by participants to work effectively together, and ends with a call for the resources needed to achieve these ambitious aims to be made available at national and international level. At the heart of the document are six goals that are indispensable for lifelong learning:

- i expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
- ii ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality;
- iii ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes;
- iv achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
- v eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality;
- vi improving all aspects of the quality of education and ensuring excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in numeracy and essential life skills' (cited in Hinzen and Müller 2001, 40).

An important step towards meeting these goals was the establishment of an independent EFA Global Monitoring Report team, answerable to UNESCO, which is reporting annually on progress in meeting the Dakar goals until 2015. The team is also making recommendations for reinforcement and improvements, and reporting on positive experiences from which others may learn. The first report, an extremely substantial analysis and set of data, was published under the title 'Education for All. Is the world on track?' The summary reads: 'Rights, freedoms and development benefits constitute a powerful triumvirate of arguments for Education for All. Together, they demonstrate that there is a fundamental identity between EFA and development and that each of the EFA goals brings separate opportunities for securing other gains' (UNESCO 2003, 1).

The area of literacy for young people and adults, including non-formal provision outside schools, which is of particular importance for us, was examined in 2006 in an EFA progress report on the situation of literacy worldwide; together with some encouraging findings, this report points to the following shortcomings and dangers:

- There are still around 100 million children not in primary school, 50% of them girls.
- The goal of gender parity has been missed in too many of the countries studied (in 76 out of 180 at primary and in 115 out of 172 at secondary level).

- Fewer than two-thirds of primary school pupils (in 41 of the 133 countries studied) reach the final year of schooling, and there is an issue over quality.
- 771 million people over 15 years of age still have inadequate reading, writing and numeracy skills.
- Of these, 132 million are in the age group 15 to 24 years, and could make use of literacy over a long period of life and work.
- 75% of illiterates live in 12 Arab states, sub-Saharan Africa, and South and Western Asia, where the literacy rate is generally around 60%.
- On average throughout the world, 88 women are literate for every 100 men, but only 62 or even as few as 57 women for every 100 men in many countries in Western Asia.
- The proportion of development assistance allocated to basic education, 2.6%, is too low.
- Only 1% of education budgets is available for youth and adult literacy (German UNESCO Commission 2005).

At the end of the report there is more playing with statistics – it has to be called that if there is no realistic likelihood of obtaining the amount needed: if we were to assume that some 550 million adults took part successfully in a literacy programme lasting 400 hours, this would require a total of US\$ 26 billion by 2015. Not much, if we bear in mind that this is the sum spent worldwide in a fortnight on armaments and military operations.

The Dakar Framework for Action also contains a crucial statement in which the international donor community makes its own commitment:

‘Political will and stronger national leadership are needed for the effective and successful implementation of national plans in each of the countries concerned. However, political will must be underpinned by resources... We affirm that no countries seriously committed to education for all will be thwarted in their achievement of this goal by a lack of resources’ (UNESCO 2000, para. 10).

This promise has not yet been kept. None of the three largest donor countries (United States, Japan, Germany) gives more than 4% for basic education. To date, only US\$ 3 billion have been made available to the poorest countries, while at least US\$ 11 billion are needed to achieve the minimum goals of EFA (UNESCO 2007a, 38).

3. UNLD – United Nations Literacy Decade: 2003–2012

Before the World Forum in Dakar, a lobby group had met at UNESCO (see Torres 2000a), to develop a strategy to push commitment to literacy up the decision-making agenda of the United Nations. This was followed by a meeting in one of the workshops at the World Forum, which reached the following conclusions on what was needed:

- ‘a comprehensive and renewed understanding of literacy, including children, youth and adults, in and out of school;
- a renewed vision and a renewed commitment from all: national governments, national and local societies, and international agencies; in the family, in the community, the workplace, the school system, and the media;
- renewed strategies and mechanisms at all levels, consistent with such renewed vision and with the magnitude and complexity of the challenge’ (Torres 2000b).

The next step was the adoption of the UN Literacy Decade at the 2002 plenary session of the United Nations, to run from January 2003. This confirmed the call by the EFA Forum for a 50% cut in the illiteracy rate (by comparison with the rate currently obtaining in each individual country), and charged UNESCO with coordinating the Decade. The task was given the slogan ‘Literacy as Freedom’, and six areas were highlighted for particular attention in the implementation:

- Placing literacy at the centre of national education systems.
- Creating synergies between formal and non-formal approaches.
- Strengthening the culture of reading and writing, and creating an environment supportive of literacy.
- Ensuring community involvement in literacy programmes.
- Building partnerships at all levels between government, the private sector and civil society.
- Systematic monitoring and evaluation. (Summarised from UNESCO n.d., 3; see also UN General Assembly 2002.)

From the reports presented at the UN General Assembly in 2004 and 2006 it was not apparent that any real progress had been made towards the goals set for the Decade. Rather, the worry was expressed that a mid-term report ought to be issued in 2008: ‘Decade progress should be measured in terms of the four expected outcomes set: 1) significant progress towards EFA goals 3, 4, and 5 by 2015; 2) attainment by all learners of a mastery level of literacy; 3) creation of dynamic literate environments; and 4) improved quality of life of learners’ (UN General Assembly 2006, 19). The recommendations called for stronger efforts by governments, the international community and international organisations if the goals were not to be missed by a wide margin.

In response, UNESCO planned a total of six regional literacy conferences in Qatar, China, Mali, India, Costa Rica and Azerbaijan for 2007/8, to exchange information on the progress of the Literacy Decade, to enhance cooperation, and to reinforce mobilisation of the requisite resources. A UN Literacy Decade Expert Group was also set up in 2007 to oversee the progress of the Decade and to prepare at short notice the interim report to be presented to the UN General Assembly in September 2008 (UNESCO 2007b, Appendix: UNESCO Regional Conferences in Support of Global Literacy).

4. LIFE – Literacy Initiative for Empowerment: 2005–2015

This initiative derives from a decision by the General Conference of UNESCO in October 2005, which made a direct link with EFA and UNLD, and indirectly with the MDGs. Cooperation between government agencies, NGOs, the private sector and the civil society, and all bilateral and multilateral organisations, was stated to be a requirement for success. Concentration on the countries in which 85% of all the illiterates in the world live and where there is a recognisable serious willingness to change matters, was made binding. The UNESCO Institute for Lifelong Learning (UIL) in Hamburg was charged with coordination. The following was the answer given to the question, ‘What is LIFE?’:

- ‘a framework of collaborative action for enhancing and improving national literacy efforts;
- a process in support of literacy which is country-led and country-specific;
- embedded in national policies and strategies;
- a mechanism for technical support services and facilitation by UNESCO in the areas of policy, advocacy, partnership building, capacity-building and innovations’ (UNESCO Institute for Lifelong Learning 2007a, 12).

A total of 35 countries were selected, 18 of these in Africa, six in the Arab States, nine in Asia and the Pacific, and two in Latin America and the Caribbean, on which LIFE will focus in a rolling sequence of stages. National plans, drawn up in cooperation with UIL, are the starting point for monitoring and evaluation strategies to produce annual reports summarising the situation in each country. In parallel, research will be conducted at the international level to establish how far UNESCO and the international donor community have actually fulfilled the commitments they have made (UNESCO Institute for Lifelong Learning 2007b).

The good news from UNLD and LIFE is that both emphasise and strengthen the out-of-school literacy element of EFA; there will unquestionably also be considerable coordination and synergy effects. The complete underfunding of

this aspect of EFA is not mentioned by either UNLD or LIFE, however, since little additional funding is flowing into literacy as a whole. As we know, the World Bank EFA Fast Track Initiative (FTI) concentrates primarily on the State school sector, and therefore ignores (so far) all out-of-school literacy work in youth and adult education. At the regional UNLD conference in India, delegates nonetheless proposed as one of their final recommendations that FTI should in future also support the literacy activities of NGOs in out-of-school youth and adult education (Ministry of Human Resources Development, India 2007). It will be interesting to see whether this suggestion is acted upon.

5. DESD – Decade of Education for Sustainable Development: 2005–2014

Once again, it was a decision by the UN General Assembly that launched this Decade, which goes well beyond purely ecological concerns:

‘The overall goal of the DESD is to integrate the principles, values, and practices of sustainable development into all aspects of education and learning in order to encourage changes in behaviour that will create a more sustainable future in terms of environmental integrity, economic viability, and a just society for present and future generations’ (UNESCO 2005b, para. 1).

These principles are to be integrated into education systems at national level. UNESCO has once more been charged with the coordination.

In Germany, the Bundestag Committee on Education, Research and Technology concerned itself in June 2004 with the UN decision and the Action Plan of the World Summit on Sustainable Development held in South Africa in 2002, which had accorded education a significant role. The Federal Government was asked to combine German proposals into a national action plan. Under this, a separate transfer centre for successful projects was to be set up, and initiatives were to be developed and supported in schools, vocational, tertiary and continuing education. Particular attention was to be given to harmonisation between knowledge, awareness and action in development education and global learning. It was also emphasised that:

‘... further increased efforts should be made to implement the Millennium Declaration and international development goals, particularly in basic education and gender equality. The Federal Government should apply development priorities consistently and act as a driving force for both the “Education for All Fast Track Initiative” and the implementation of national poverty strategies’ (Deutscher Bundestag 2004, 4).

The plan that was then unanimously agreed recommended that the German UNESCO Commission (DUK) should be charged with coordination and funded accordingly.

The DUK has rapidly, and successfully, responded to this task. A National Round Table has been set up to bring together and mobilise the most important players, and a number of committees are now working on particular topics. A working group on out-of-school and continuing education has been established. In its position paper, this states:

‘Because of its interdisciplinary nature, the global image of sustainable development poses a challenge to the entire education system, calling for new teaching methods and a cross-subject approach. Out-of-school education provides facilities (alternative places and types of learning) that are able to react flexibly to consequent new demands and to promote initiatives that may have an innovative impact on education in schools. ... Through out-of-school learning, people can acquire skills which are indispensable for the future shaping of our society and for meeting our responsibilities as world citizens’¹ (German UNESCO Commission 2006, 1).

UNESCO has responded to its coordinating function and has appointed relevant committees and staff: a High-Level Panel, a United Nations Inter-Agency Committee, a Reference Group and a Monitoring and Evaluation Expert Group; suggestions have been made for integration into the various areas of basic and secondary education, vocational education and training, tertiary education and teacher training, and an overview report of the first two years has been discussed in the UNESCO Executive Committee. It comes as no surprise that this calls once again for ‘mobilisation of financial resources to overcome the gaps in DESD implementation, in particular in countries where the need is greatest...’ (UNESCO 2007c).

6. Recent developments in Europe: 1996–2007

The call for ‘Education for All’ refers largely – but not solely – to developing countries, particularly if it is taken only to mean basic education. The major international education conferences attended by representatives of the governments of most countries, as well as by UN organisations, multilateral donors, NGOs and specialist agencies, have not allied themselves with this narrow view, however. The EU speaks in its Memorandum on Lifelong Learning of the importance of ‘new basic skills’; and the Communication on the implementation of the Memorandum states repeatedly that new skills build on old skills (see Conference Documentation 2003; Motakef 2007; Tröster 2000).

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Various comparative international studies, especially by the OECD (Organisation for Economic Co-operation and Development) have also pointed out that countries in transition, threshold countries and industrialised countries have their own problems over high-quality basic education as a foundation for further learning and successful careers. Many of the results of PISA (Programme for International Student Assessment) make it very plain that deficits in basic skills at school lead to difficulties with lifelong learning in adulthood (e.g. OECD 2000; for PISA data see also www.mpib-berlin.mpg.de/pisa/ergebnisse.pdf).

In 2001, the EU published the Communication 'Making a European Area of Lifelong Learning', which is taken to embrace the entire education sector, hence including adult education (see www.europa.eu.int and for the broader context Hinzen 2007). In the process which followed, the perception of adult education as providing nationwide, decentralised coverage via its own learning centres within easy reach of citizens, and offering both general and political education, as well as preparation for employment and, increasingly, for continuing education, gained in importance. Ultimately, fresh attention was paid to the four-pillar model of school education – vocational training, tertiary education and adult education – although great importance was then attached to the possibility of moving from one to the other, and transition between sub-systems, non-formal and informal learning, in line with what was learnt from PISA.

In 2006, the EU Commission then brought out a Communication on learning in adulthood entitled 'It is never too late to learn'. This built systematically on various other studies. One of these had been conducted by the European Association for the Education of Adults (EAEA). That study (EAEA 2006) examines the situation with regard to educational policy, legislation and funding, discusses reasons for non-participation and how to make access easier, makes statements about basic skills and key skills, deals with certification and accreditation, sheds light on the quality of initial and inservice training, and makes broader connections with demography and migration. The conclusions drawn and the recommendations made culminate in five messages that need to be heeded: development of a system of adult education; core public funding; quality in training and professionalisation, evaluation and recognition of skills acquired non-formally; and development of indicators for research and statistics.

The definition of adult education chosen in the EU Communication refers to 'all forms of learning undertaken by adults after having left initial education and training' (i.e. including tertiary education) (European Union 2006, 1). It also calls for the lifting of barriers to participation; quality assurance in adult education; recognition and validation of learning outcomes; greater investment in the ageing population and migrants; and development of indicators and

benchmarks. Overall, the Communication is an encouragingly clear statement of the value of adult education. It was followed approximately a year later by an Action Plan, 'Adult learning: It is always a good time to learn'. This gave concrete shape to the proposals, taking into account subsidiarity between Brussels and governments.

It is interesting that this EU process of developing an adult education policy would seem overall to parallel the progression from CONFINTEA V to VI. The similarities range from the timescale (the European Year of Lifelong Learning in 1976, the UNESCO International Conference in 1997 and the call for 'one hour a day for learning'), via the addressing of more specific topics (professionalisation, assessment and recognition of informal and non-formal learning) to the appointment of key people to relevant committees: there were EU representatives at the CONFINTEA V Mid-Term Review Meeting, for example, and the EU is a member of the CONFINTEA VI Consultative Group – while in reverse, representatives of UIL were members of the group advising on the Communication and the Action Plan.

7. NGOs – Education watch and/or partners?

At the early CONFINTEA conferences, governments were almost entirely on their own. The breakthrough may have started with CONFINTEA III in Tokyo, when civil society views, specialist organisations and NGOs were made welcome. To name just two individuals and organisations, Roby Kidd, the General Secretary of the Canadian Adult Education Association (CAEA), and Hellmuth Dolff, the Director of the German Adult Education Association (DVV), were each included in their national delegations. Only later, however, were NGOs permitted to attend as a separate category of representative bodies, and in huge numbers at CONFINTEA V in Hamburg. Perhaps it was only logical that representatives of NGOs met to form the ICEA in 1973, just one year after Tokyo. And while we are mentioning names, Paul Bélanger was Director of UIL for ten years and was heavily involved in the preparation, delivery and follow-up of CONFINTEA V, before returning to the University of Montreal and becoming, a short while later, President of the ICAE, to which position he was recently re-elected in January 2007 at the World Assembly in Nairobi (see *Adult Education and Development* 2006 and 2007; *Voices Rising* 2007a).

The ICAE and its regional and national members are preparing systematically for CONFINTEA VI, both by actively collaborating with the official preparation committees, and by mobilising their members to discuss critically the situation and prospects of adult education. In Africa, for example, two conferences are being held in 2007/8 in Mozambique and Senegal under

the banner of 'Advocacy Tools for Civil Society Education Watch', in order to prepare for the CONFINTEA VI pre-conference planned for July 2008 in Kenya. The three specialist NGOs PAALAE (Pan African Association for Literacy and Adult Education), ANCEFA (African NGO Coalition on Education for All) and PAMOJA (Africa Reflect Network) are discussing ways of working together and sharing positions (see *Voices Rising* 2007b and www.icae.org.uy).

ASPBAE (the Asian South Pacific Bureau of Adult Education) involved itself very early on in the EFA process; there is no doubt that it needed to, because of the large numbers of out-of-school children and illiterate young people and adults in the Asian region. ASPBAE has been working closely with GCE in this context, and it has the funds to support the GCE campaign. It has cleverly widened the focus on children and schools to include a broader view, using the slogans 'Except for Adults' – which EFA should not be misunderstood as meaning – and 'Mothers Matter Most', which opens up important gender issues. Maria Almazhan Khan, the General Secretary of ASPBAE, used UNDP documents to remind the 12th German Adult Education Conference in Berlin in 2006 that the underfunding of EFA has something to do with life styles in the North and South of this One World, which are frequently very different: citizens of Europe and the United States spend twice as much on cosmetics, and in Europe alone five times as much on alcohol consumption, while worldwide, military expenditure is a hundred times what it would cost to provide Universal Primary Education (Almazhan Khan 2005; ASPBAE 2006; see also www.campaignforeducation.org).

The specialist contributions of NGOs are indeed vital. Let us take three other examples. In its research report, 'Writing the Wrongs. International Benchmarks on Adult Literacy', which was widely quoted in the EFA progress report 'Literacy for Life', the Global Campaign for Education made a substantial contribution to the debate on the significance and feasibility of universal literacy (GCE 2006; see also www.actionaid.org). This report expressed the serious criticism that the second aspect of EFA Goal 4, 'equitable access to basic and continuing education for all adults', had not received adequate attention; a study was thereafter commissioned from *dvv international* to consider the relationship between literacy, adult education and lifelong learning (Duke and Hinzen 2006; see also www.dvv-international.de). And lastly, the well-founded paper produced by the ICAE, 'Agenda for the Future. Six Years later', uses critical arguments to identify where little progress has yet been made in achieving the goals set by CONFINTEA V as we approach CONFINTEA VI (ICAE 2003).

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Note

- ¹ The DUK has set up a portal <http://www.bne-portal.de> which reports fully on the situation of the Decade. The results of the various committees and working groups can be found there.

INTERNATIONAL COUNCIL FOR ADULT EDUCATION

The International Council for Adult Education (ICAE) is a global network created in 1973, composed of non-governmental organizations, regional, national and sectoral networks in more than 75 countries, recognized by UNESCO as an international NGO, level 1, and with consultative status to the United Nations Economic and Social Council (ECOSOC). It is a strategic network that promotes adult learning as a tool for active and informed participation of people.

ICAE's mission is "to promote lifelong learning as a necessary component for people to contribute creatively to their communities and to live in independent and democratic societies. Adult and lifelong learning are deeply linked to social, economic and political justice; equality of gender relations; the universal right to learn; living in harmony with the environment; respect for human rights; recognition of cultural diversity; peace; and the active involvement of women and men in decisions affecting their lives."

- ICAE is a network in motion, constantly rebuilding and accompanying changes in the national, regional and global contexts where ICAE is immerse.
- ICAE is a member of the International Council of the World Social Forum.
- It is a member of the International Facilitation Team of the "Global Call to Action against Poverty" (GCAP).
- The Gender and Education Office is formed by an important group of experts on gender and education as well as organizations and networks from different parts of the world.
- *Convergence* is one of the main publications in the adult education and non-formal education field. It is printed by NIACE (National Institute of Adult Continuing Education in Great Britain), on behalf of ICAE.
- ICAE has a weekly electronic bulletin, *Voices Rising* that disseminates general, regional and national information, which facilitates the link between local and global spaces, and promotes the exchange of reflections and diverse practices for social inclusion.
- Every year ICAE organizes an international training course, *IALLA*, for lifelong learning advocacy leaders. This is an innovative and pioneering project that promotes the development of global citizenship and the right to education.

- ICAE carries out follow-up and monitoring actions of United Nations Summits and Conferences, particularly CONFINTEA and EFA as well as the MDGs.
- ICAE forms part of the Consultative Group of CONFINTEA VI.

ICAE represents more than 800 organizations working on the promotion of the right to learn, literacy, youth and adult education and lifelong learning. It has seven member organizations at regional level and national members in 75 countries.

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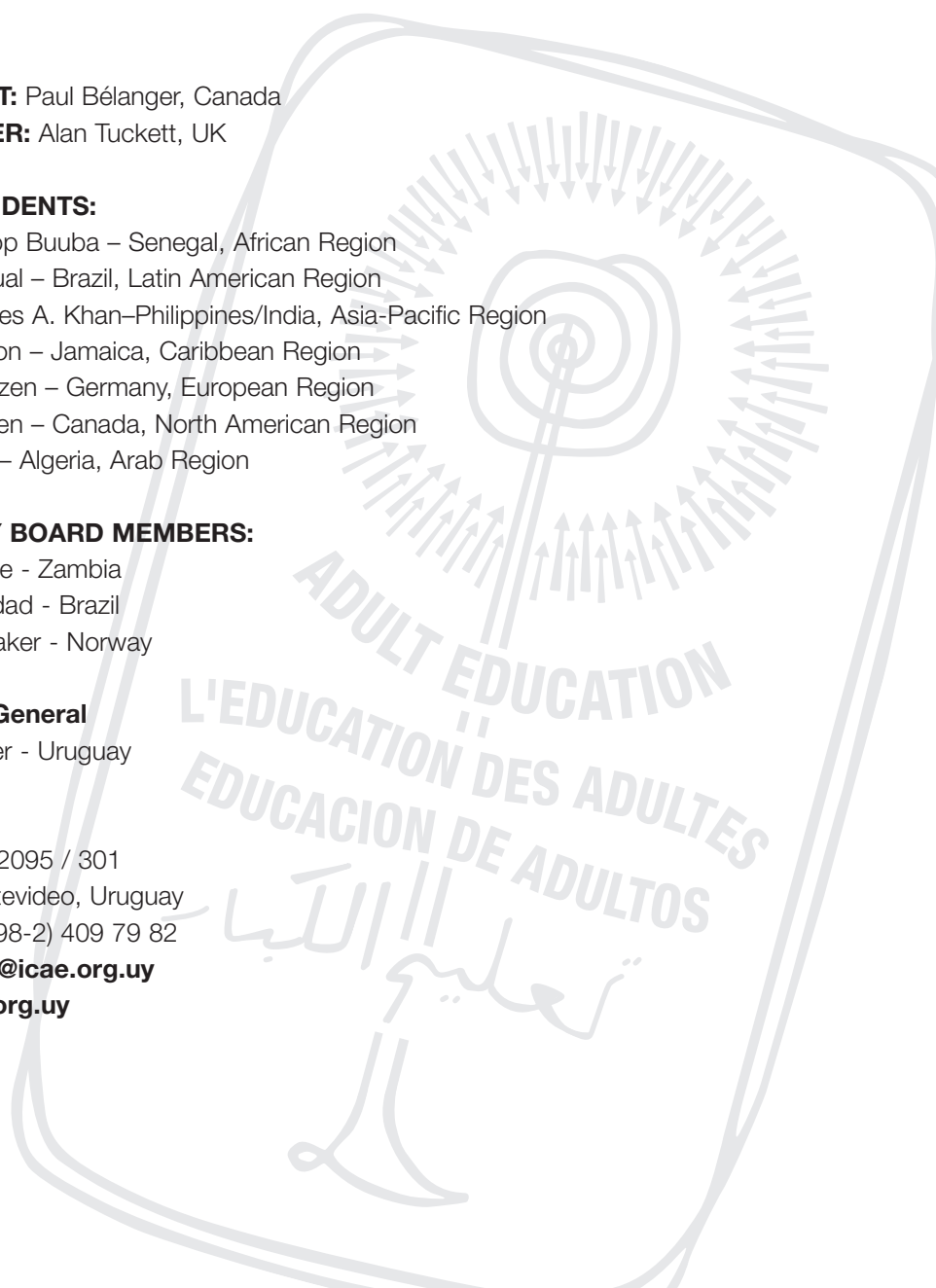
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CONVERGENCE is the quarterly journal of the International Council for Adult Education, with readers in over 80 countries. Because of our international distribution, we attempt to select articles of interest to a broad audience of practitioners, field-workers, planners, trainers, teachers, researchers and administrators. In addressing issues, practices and developments in adult education, **CONVERGENCE** provides a forum for a discussion and exchange of experiences and ideas. Articles are accepted in English, French and Spanish.

Points to Remember

- ❖ We prefer to receive a letter of enquiry describing the content of the proposed article, its treatment and why you believe it is suitable for **CONVERGENCE**. Our experience has been that those who read the journal regularly are more likely to have a good sense of an appropriate article. The enquiry letter also helps us to judge if a similar subject or the same region has appeared in a recent issue—we attempt to maintain a balance among subject matter and regions of the world.
- ❖ An article may be about a particular country, programme or activity, but the interpretation, description and analysis should be of interest and generally applicable to the work of colleagues in other countries. Papers written for another purpose (e.g., a local audience, a course of study, part of a thesis) are usually unsuitable.
- ❖ Put yourself in the position of a colleague in another part of the world and ask: Does this article include what I would wish to know about another country or programme? Is the context clear? Have unfamiliar abbreviations, references or concepts been used?
- ❖ Heavily statistical research reports are not accepted. Interpret data, results and conclusions in terms of practical application and lessons learned.
- ❖ Since **CONVERGENCE** is part of ICAE's Information and Communications Programme, no payment is made to authors of articles or book reviews. Authors receive a copy of the issue in which their work appears and reviewers may keep the book that they review.

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CONVERGENCE follows *The Chicago Manual of Style* (13th or 14th editions) for formatting references and notes; consult the most recent issue if you do not have access to this manual. Writing should be informal, without jargon or convoluted sentences. Keep footnotes and references to a minimum. Tables and graphs are considered only when they depict essential information that cannot be described adequately in the text.

Commonwealth (Oxford UK) spelling should be followed—centre (not center), programme (not program), criticise (not criticize), co-operate (not cooperate) percent (not per cent). Numbers ten and under are spelt out; 11 and over use numerals.

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Book reviews must provide a concise summary of the contents of the book and must address whether or not the book is a valuable contribution to the field. As such, reviews should evaluate the usefulness of the book as well as make mention of who would find the book useful. Reviews should be written in a manner that is accessible to a general readership rather than to an academic audience.

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Footnotes and references must be kept to a minimum. **CONVERGENCE** uses Commonwealth (Oxford UK) spellings—centre (not center), programme (not program), criticise (not criticize), co-operate (not cooperate), percent (not per cent), and so on. Numbers ten and under are spelt out; 11 and over use numerals. Include the title, author, place of publication, publisher and number of pages with your review.

Requirements

Length: Reviews should not be longer than 600–1000 words (about two to four pages).

Submission: Emailed submission is preferred (QSun@uwyo.edu), however, one copy may be mailed if email is not possible. The review should be typed double-spaced. MS Word format is preferred but WordPerfect is also acceptable.

Author's Information: Include your institutional affiliation and its national location with the review. Also include your address, fax and telephone numbers, and your email address (if one is available).

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