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ABSTRACT

The purpose of this report is to clarify the concept, main features, and objectives of the "recurrent education" issue and to spell out the implications that this approach will have for educational and socio-economic policy making. It is suggested that acceptance of the "recurrent education" proposal implies not only a major turning point in educational policies but that it also has important consequences for social and economic policies. Thus there is a need for a coordinated approach and for the establishment of appropriate planning and policy making mechanisms for dealing with the issue. Through long term planning and policy perspective together with immediate short term planning such a reorganization could take place. Further implications of the "recurrent education" approach as it relates to the labor market, to the use of mass media, to social security provision, and to the social, economic, and cultural sectors at large are included. (KP)

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# **RECURRENT EDUCATION:**

## **A STRATEGY FOR LIFELONG LEARNING**

U.S. DEPARTMENT OF HEALTH  
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*Centre for Educational Research and Innovation (CERI)*

# **RECURRENT EDUCATION:**

## **A STRATEGY FOR LIFELONG LEARNING**

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1973

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## PREFACE

The advanced societies of the twentieth century have behaved as if education could be expanded to the point where all available talents would be developed, and that the schools would thereby become one of the main avenues to greater social equity.

The path to this state of social justice based on education has been seen as a continuous and lengthening process including pre-primary, primary, secondary and higher education. In Europe and Japan, following the same path as the United States, mass higher education is following in the wake of the expansion of secondary education achieved in the last 20 years. In other words, something like 15-20 years of continuous presence in educational systems appears to be seen as the best way of developing the individual and of achieving social equality.

The concept of recurrent education is based on a different approach - namely that education opportunities should be spread out over the individual's lifetime, as an alternative to the ever-lengthening period of continuing education for youth.

There are many reasons for moving in this direction. First, educational expansion has not played the role in social equality that was foreseen. Second, some form of continuing or permanent education is indispensable in societies where social and economic change calls for continuing social and occupational adjustment by individuals. Third, the divorce of formal education from learning by experience, which has typified most educational systems, is making some form of "deschooling" a necessity. Finally, recurrent education would reduce the gap between the educational opportunities now given to young people and those from which the older generations have benefited.

Yet, however strong the case for recurrent education may be, it would be naive to seek or expect a major reversal of educational policy. Education is too sensitive and complex a system to respond to surgery. Recurrent education is to be looked upon

as a framework for a major but gradual reorientation of policy towards new objectives, rather than as an immediate, radical change.

An essential starting point for this reorientation of policies lies in new approaches towards the 16-19 age group. As long as university entry continues to be the only road to occupational and social success, the headlong rush into higher education will continue, and the secondary schools will continue to be the ante-rooms of the universities. Mr. Khrushchev tried to attack this problem by a compulsory period of work between school and higher education - and failed. What seems to be called for is a reform of the upper end of secondary education so as to enable a smoother transition to work, and a less final choice as between university entry and work or social service.

Such a policy could only succeed if a more flexible post-secondary system keeps open recurrent opportunities for adults, so that those who opt for work or social service are not irrevocably penalised. Despite many changes in recent years, post-secondary education is still geared to the needs of the young people entering higher education after secondary school. It is not adapted to the needs of adults, nor does it enable meaningful alternation of periods of work and education. The report outlines changes in higher education that would make it an educational service available to all, at every age, wherever and whenever required.

Such policies could succeed only if in the future policies for formal education, adult education and on-the-job training are co-ordinated and related to a common set of social and economic objectives; and if more movement between education, work and leisure is made possible by new social policies and collective-bargaining agreements. Herein lies a major task for the 1970s.

The purpose of the following Clarifying Report by the Secretariat, written by Denis Kallen and Jarl Bengtsson of the CERI Staff, with assistance by Åke Dalin as a consultant, is not to make proposals but to provide a basis for discussion. I would like also to express the gratitude of the Secretariat to the many other individuals and institutions from whose ideas and comments this report has benefited.

J.R. GASS

Director,

Centre for Educational Research and Innovation



## INTRODUCTION

"Recurrent education" is a newcomer among proposals for the education of the future. Its advocates claim that it can remedy the shortcomings of the present educational system and meet future needs. The concept has rapidly become the common denominator for a great number of propositions for alternative educational futures, alternatives which in certain cases embrace all aspects of education and of its interaction with society, in others only some of them - although in the view of their promoters the essential ones. For an understanding of the concept, this double origin and this twofold claim - to offer a full-scale alternative, functioning within the society of the future and remedying the shortcomings of the present educational system - must be borne in mind.

The essence of the recurrent education proposition as it is understood in this report is the distribution of education over the lifespan of the individual in a recurring way. This means a break with the present practice of a long, uninterrupted pre-work period of full-time schooling, which has been described as a "front-end model"(1). It also implies the alternation of education with other activities, of which the principal would be work, but which might also include leisure and retirement. One of its

1) Bruno Stein and S.M. Miller, "Recurrent Education: An Alternative System", in: Rethinking Urban Education: Essays in Honor of Robert Havighurst, edited by Walberg and Kopan. San Francisco, Jossey-Bass, 1972. Also in New Generation, summer 1972.

essential potential outcomes is to make it possible for the individual to abandon the unalterable education-work-leisure-retirement sequence and to enable him to mix and alternate these activities within the limits of what is socially possible and in accordance with his own desires and aspirations(1).

The appeal of the recurrent education proposition lies in its claim to offer an alternative to the unlimited further expansion of the formal and youth-oriented educational system, as well as making possible earlier participation of the individual in society.

The arguments against a sheer extrapolation of this expansion and the concomitant lengthening of the individual's schooling are manifold. It is widely felt that if expansion of the present educational system continues indefinitely, a major educational crisis is inevitable. Significant factors to be considered includes

- a) The "malaise" in secondary education. Apart from its effects on efficiency and the ensuing high repeater and drop-out rates, it is becoming a major problem in the recruitment and work motivations of teachers, leading to a general atmosphere of slackness and indifference(2).
- b) Serious social and socio-educational arguments can be advanced against the eventuality of an uninterrupted period of some 18 years of education for the quasi-totality of youth. From the point of view of personality development, such a long isolation from the challenges of life outside the protective educational environment appears undesirable. From a social point of view, late entry into society and the corresponding absence of the younger generation from public life and social institutions deprives these of the specific contribution that only the young are able to provide, thus posing a threat to the creative functioning of society(3).

- 1) See for this: Johan Galtung, "Social Structure, Education Structure and Lifelong Education", in Reviews of National Policies for Education, Japan, OECD, 1971.
- 2) The report of the French Commission on the Teaching Profession in Secondary Education, presided over by Mr. Louis JOXE, released on 3rd October, 1972, bears convincing witness to the malaise in the French secondary schools.
- 3) See James S. Coleman, "How do the Young Become Adults?", in Review of Educational Research, Vol. 42, N° 4: autumn 1972.

- c) The emerging imbalance between supply and demand of highly qualified manpower has already become a serious problem in post-secondary education in many highly-developed countries. A key factor in this situation is the high level of students' expectations regarding their future professional level and its remuneration. It can reasonably be anticipated - and the first signs of this - have already begun to appear - that poor job expectations for academically trained manpower will lead to a spontaneous decrease of enrolments of secondary graduates in higher education. In other cases it will lead to more severe selection in higher education, and eventually to a high rate of drop-out or transfer to other faculties. Neither of these two developments, however, offers a solution to the basic problem of imbalance between supply and demand.
- d) The adult education sector is growing very rapidly and demand is still far from being satisfied. Adult education does not, however, make up for the failure of the formal education system to fully attain one of its major objectives, i.e. to provide equal educational opportunities. Nor does it offer a valid alternative way of access to knowledge, aptitudes, and professional success, particularly as much of it consists of non-degree courses. Often, however, it reinforces the social polarisation resulting from youth education. Moreover, it often represents an inefficient use of resources. It can be a frustrating experience for the adult students who may have made important sacrifices in terms of time and money in order to participate. This is not to deny that many adults have increased their educational level and career chances by following adult courses, but rather to argue that adult education as it now stands is not an appropriate second-chance alternative to youth education.
- e) Knowledge is expanding more and more quickly and once acquired, becomes more and more rapidly outdated. Education has generally responded to this by increasing both the volume of knowledge to be absorbed and the number of years spent in school. But it is becoming obvious that even if the concept of "learning to learn" were implemented more successfully in the schools than has been done

up to now, the concentration of education in the early years of life is incompatible with the objective of giving the individual access to and control over knowledge throughout his life.

- f) As a result of the high speed at which resources for education have increased, the younger generation has had many more educational opportunities than its elders. This disparity is without any doubt much greater now than before, and also much greater than can be justified in terms of the difference in what will be expected from the younger as compared with the older generation. An education "generation gap" now exists and is beginning to cause discontent among those who are just above the present school-going age groups.

If only one of the above problems had to be tackled at a time, re-adaptation of the conventional educational system might offer at least a temporary solution. But the essence of the educational crisis is precisely that it is the crisis of a system, of which the above-mentioned phenomena are only a few of the symptoms.

In a short-term perspective, this crisis is forcing many countries to restructure their current institutional frameworks. Because, at the higher education level, the traditional institutions alone are no longer able to meet the needs of society and the individual, many new, non-traditional types of post-secondary institutions are being created(1).

Courses that lasted between four to seven years are being broken down into shorter, self-contained cycles. Parallel possibilities for full-time and part-time studies are being created and admission rules are becoming more open and flexible. These measures will no doubt in the short-term solve some of the problems of post-compulsory education. But they leave untackled the question at the root of all the above-mentioned symptoms of malaise and imbalance. This fundamental question can best be formulated as follows: is a continuous process of schooling, from pre-primary through primary, secondary, and higher education, the best way to prepare all individuals for their future role in society and to provide optimal opportunities for self-development; and secondly, is a continuous lengthening of the schooling period,

1) See: Towards New Structures of Post-Secondary Education, OECD, 1971.

and hence a continuous further expansion of the conventional educational system, the best way to respond to the increasingly important role of knowledge and abilities in modern society?

Two major alternatives are being proposed to an unlimited expansion of the present educational system and an unlimited further lengthening of the schooling period:

a) Deschooling: Ivan Illich's thesis(1) has a strong appeal to all those who are convinced of the need for an alternative strategy to present education policy. While its merit is that it has laid bare some of the system's shortcomings, its weakness is that it does not suggest a valid alternative. Not only are the examples of alternative practices inoperable in most social systems, but the proposed alternatives are irrelevant for those people who would most need to have access to "deschooled" education. The greatest limitation of the deschooling thesis lies in the fact that it ignores the real cause of the failure of education to realise the "impossible dream", i.e. to provide equality of opportunity in an unequal socio-economic system(2). The liberating, socially productive technologies from which the "deschooler" expects so much will require, in order to be fully used for the individual's benefit, that the user be capable of controlling his social environment. As long as the social relations in his work situation remain unaltered, the individual will have difficulty in liberating himself from the socio-economic constraints that influence his behaviour. Deschooling is, as it were, a false liberation from the constraints of the institutionalised school. Its consequence in our present society might indeed be that the strong will profit much more from the new types of opportunities than the weak. For, if the individual is a pawn in work, leisure

1) Ivan Illich, Deschooling Society, New York, Harper and Row, 1971. The idea of deschooling, which has been widely discussed during the last few years, dismisses what can be called the Myth of Consumption as a cruel and illusory ideology forced upon the people by a manipulative bureaucratic system. It looks upon welfare and service institutions as part of the problem and not as part of the solution. Consequently, it rejects the belief that education constitutes a service system for equality and individuals' free development. Schools, according to Illich, must simply be eliminated in order to free the individual and thereby give him a possibility to change society.

2) See, for a fundamental critique of the deschooling thesis: Herbert Gintis, "Towards a Political Economy of Education: A Radical Critique of Ivan Illich's 'Deschooling Society'", in Harvard Educational Review, Vol. 42, No 1, February 1972.

and neighbourhood activities, it is an illusion to believe that he will be able to take his future into his own hands via his education.

Thus, the deschooling thesis can be said to go too far in connection with the demolition of the present institutionalised school system because it does not tackle the issue of meaningful participation in broader social terms.

b) The second alternative is the subject of the following report. It puts forward the view that the role of education in future society will continue to increase, but that only lifelong access to education can provide a viable alternative to the further expansion of youth education. The system discussed in the following sections is called "recurrent education". The concept of "recurrent education" intends to propose a concrete framework within which a great part of the individual's lifelong learning can take place. It differs from the concept of "permanent education" by making the principles of alternation between education and other activities central to the definition.

It differs essentially from the deschooling proposition in that it explicitly proposes a total systems change in the following ways:

- i) It encompasses not only the education provided after youth schooling, but also within it, and informal as well as formal education.
- ii) It implies major changes in socio-political and economic institutions, but attributes to education an instrumental role in facilitating these changes.

It is not mistakenly labelled as an alternative educational strategy, as it rests on the assumption that educational and social change closely interact and that an alternative educational strategy can provide an important contribution to - but at the same time is not operable without - concomitant social change.

In conclusion, recurrent education is a proposal for an educational strategy embracing the full array of present educational provisions, formal and informal, for young people and adults. It is a long-term planning strategy(1) and not a proposal for sudden radical change. As its planning includes suggestions for a gradual re-orientation of the present towards

1) The term as applied to recurrent education is from Professor William Taylor at Bristol University.

the future, it has immediate implications for educational policy and innovation at many levels of education.

The following report is primarily intended to clarify the concept as such, and to outline the major features of a future education system geared towards the recurrent principle. It does not define a detailed strategy for attaining this long-term objective, although it touches on some of the major immediate implications.

Part One

RECURRENT EDUCATION:

CONCEPT, MAIN FEATURES, AND OBJECTIVES



## Chapter 1

### TOWARDS A DEFINITION OF RECURRENT EDUCATION AND A DESCRIPTION OF ITS MAIN FEATURES

#### INTRODUCTION

The reasoning underlying the concept of recurrent education is that in a rapidly changing society, learning is necessary throughout life, not only for the selected few, but for all(1). It seems appropriate to explain at the beginning of this report how this concept is related to the concepts of lifelong learning, lifelong education, and permanent education.

"Learning" is not, however, identical to "education". Learning is an essential characteristic of the living organism, necessary for its survival and for its evolution. Man learns in all his life situations. In the more specific sense of gathering knowledge and applying it, human learning takes place not only in school, but also at home and in the work environment: in short, in all situations where man abstracts from the concrete these aspects that are general, constructs symbols that represent them, and makes them applicable to other situations and fit to be communicated to other people.

"Education" is organised and structured learning, confined to an intentionally created situation. This is not necessarily an institutionalised or school situation, although school represents the prototype of the intentional and formal learning situation. But it presupposes a certain "leisure" from other activities.

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1) This generalised need for lifelong learning has very rapidly become one of the top priorities of educational policy in the developed as well as in the developing nations. See the recently published UNESCO report Learning to Be, by Edgar Faure et al., UNESCO, 1972, in which high priority is given to a strategy for permanent education.

a "schole" in the classical sense and a deliberately created organisational framework within which knowledge, aptitudes, attitudes, and skills can be acquired(1).

In this context, the concept of lifelong learning assumes a more precise sense in that it accentuates the need for adaptability through a constant registering and processing of information, formation of concepts, and development of attitudes and skills, all of which are qualities that have become more necessary in a rapidly changing society than they were in a relatively static society. This learning process is not restricted to any particular situation or environment. But education, because it requires a certain abstention and distance from other activities, cannot conceivably be a permanent or continuous process. The concept of "permanent", "continuous" or "lifelong" education as such does not, therefore, express clearly what is meant, as it leaves vague the question of how lifelong education opportunities will be provided, and how they interact with lifelong learning.

#### THE SCOPE OF RECURRENT EDUCATION

The concept of recurrent education as it is used in this report expounds the relationship between "learning" and "education" by putting it in the perspective of the necessity for a lifelong process of assimilation of new knowledge and experience at the service of a continuous openness to new situations and of enhancing people's ability to take their destiny into their own hands. "Education" provides organised conditions for learning, enabling the students to acquire new knowledge and to put into a general context the facts and experience they have absorbed in unorganised learning situations. The view is put forward that, because of the complexity of modern society, due in great part to technological development, the need for opportunities to alternate incidental and informal lifelong learning with more organised and intentional educational opportunities is rapidly increasing. Recurrent education aims at providing these opportunities.

This alternation between recurrent education and other social situations explicitly recognises the importance of the incidental

1) In English the word "education" means both character development or socialisation and education in the sense to which we here refer. In several other languages, notably in German ("Erziehung" and "Bildung"), in Dutch ("opvoeding" and "onderwijs"), a clearer distinction is made between the two concepts.

learning experience acquired in the latter. Its purpose is to enable the individual to take stock of the experiences he has accumulated, place them in a general context, and test them on their relevance to his own life: his education, his career development, his social relations, his political views - in short, to the various roles he assumes in society.

Adult education must also be located in this context. It is a concept that is firmly rooted in the cultural and popular tradition of many developed countries, where it often has historically been associated with the access of the working class to culture. In the developing countries, the evolution of adult education has been closely connected with literacy campaigns, although it has repeatedly been stressed that "adult education forms a whole and that the struggle against illiteracy is only one of the more important and more critical aspects thereof"(1).

Adult education has profited from the high motivation and enthusiasm of many voluntary collaborators. It has frequently developed in a spontaneous way, without public assistance, using whatever human and material resources were available and capitalising on the competence of voluntary, non-professional, unpaid, and part-time teachers. In terms of location, timing, and nature of the teaching resources, it has adapted itself to its clients' needs and often gives them a real chance to participate in the planning and management of the courses.

The first conclusion to be drawn from this is that careful evaluation of the experience obtained in adult education is a prerequisite for the planning of recurrent education. Adult education's disinstitutionalised organisation patterns may contain some of the prototypes for a recurrent education system.

Secondly, and this will be further developed in this report, there is no place for a system of recurrent education parallel to adult education. This would create another binary system, which would result in a massive wastage of resources and act counter to the achievement of the essential objectives of the new educational strategy being proposed.

A second domain pertaining to this complex of educational provisions is that of on-the-job training: "work-integrated",

1) Notably at the 1960 UNESCO Conference on Adult Education in Montreal. The quotation is from Adult Education in the Context of Lifelong Education, UNESCO basic working paper, mimeographed document Unesco/Confedad/5, Paris, 28th April, 1972, presented to the 1972 Tokyo Conference on Adult Education.

"work-oriented", or "work-centred" education. A formidable network of provisions for such programmes has been created by industry as well as by the public authorities. Most of it is under private control and is geared towards the enhancement of the professional competence of workers at the service of technological requirements. The essential characteristic of this sector is its appropriateness to the concrete needs of industry, compensating to a great extent for the failure of formal educational systems to meet these needs.

A caveat must be introduced here, however, concerning the distribution of roles between the institutionalised educational system (basically youth education) on the one hand and informal education - including on-the-job training - on the other. It has been argued that most work-relevant education and training is, in fact, provided on the job, and not in the formal school system, the latter being relegated to giving credentials for entering the labour market at a certain level(1). That this is so is not surprising in view of the frequency of occupational change in people's lifetime(2). The occupational choice process has also become lifelong and on-the-job and other informal education makes this occupational mobility (whether it is vertical, i.e. ascending mobility, or horizontal, i.e. change of occupation) possible by providing adults with the required new and/or higher qualification.

Concerning their place in a system of recurrent education, the same principle applies to adult education, to on-the-job training, and, more generally, to all informal professional training: they must be made part of a co-ordinated set of provisions and programmes. This can be achieved only by creating a comprehensive structural, organisational, planning, and policy framework for the totality of educational services.

Hence the recurrent education proposition directly concerns the total sector of post-compulsory or post-basic education, and the compulsory education sector indirectly. The role and function of what is now adult education, as well as that of job-related and

1) The point has been made by several authors, e.g. by S.M. Miller, in Breaking the Credentials Barrier, New York, The Ford Foundation, 1968; by Ivar Berg, in Education and Jobs. The Great Training Robbery; and recently by L.C. Thurow, in "Education and Economic Equality", in Public Interest, No 28, Summer 1972.

2) See, for example, Dale L. Hiestand, Changing Career after 35, Columbia University Press, New York and London, 1971, in particular Chapter 7.

labour-market training will have to be defined within this comprehensive new framework.

As mentioned above, the introduction of recurrent education as defined will also have strong implications for basic or compulsory education. The recurrent education principle of alternation between school and other activities as from the completion of basic or compulsory schooling can be implemented only if the last years of compulsory schooling prepare pupils for a real choice between education and work.

Such a comprehensive strategy for recurrent education does not a priori exclude the possibility of a variety of institutions and programmes. It does, however, imply an integrated policy framework in terms of objectives, policy-planning and allocation of resources, as well as appropriate changes in admissions and certification criteria.

It would be incorrect to present the recurrent education proposition in all its implications as a radically new proposition for an alternative educational future. As far as its permanent or lifelong dimension is concerned, it does not differ much from what is being proposed elsewhere(1). The novelty of the proposition as it is submitted in this report lies:

- a) in the stress that it lays on the need to define a specific strategy, i.e. that of the recurrent and alternating principle, for implementing lifelong education;
- b) in the stress on relating a strategy of recurrent education to economic, social, and labour-market policies, to be discussed in more detail in Part II; and
- c) in the greater stress on changing the present formal educational system in order to facilitate its restructuring in line with the principle of alternation between education and other forms of learning throughout the individual's whole life cycle.

The existing political and administrative structures in most OECD Member countries are not fitted to the task of defining such a long-term strategy. As to the formal school system, the

1) For example in the Council of Europe's work on permanent education. See: Permanent Education, Council of Europe, Strasbourg, 1970.

co-existence of public and private educational systems no longer stands in the way, on the whole, of a comprehensive educational policy. But relics of parcelled administrative responsibility for educational policy-making still exist in many countries, e.g. agricultural and professional schools reporting to Ministries of Agriculture and Industry, and health education facilities to Ministries of Health.

The situation in the informal sector, on the contrary, is much more confused in many countries. In Europe, only a few countries give responsibility for policy-making in the adult education sector directly or indirectly (i.e. via resource allocation, control over quality of programmes, etc.) to the public educational administration.

In most other European countries, only parts of this sector are controlled by the public administration, and in an indirect way (mainly via state or other public subsidies). They are often the concern of, for example, Ministries of Social and/or Cultural Affairs and not of Ministries of Education. Other parts of the sector, such as correspondence education and private residential courses, are increasingly submitted to a minimum of public control in order to guarantee that basic consumer rights are respected, but they are totally independent of educational policy-making.

The situation is different as far as on-the-job training is concerned(1). To a great extent, this is organised by and within industry. In most European countries, industry has created its own facilities, programmes, and criteria, and the government is not involved. In the United Kingdom, large and important parts of on-the-job training are, however, entrusted to the post-secondary educational institutions and regulated by Acts giving the government a certain control over this sector.

On the whole, however, it can be said that important legal and political-administrative changes will be necessary in order to implement the principle of a comprehensive recurrent education policy.

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1) The separation between "general-culture" and "on-the-job training" sectors is much less relevant in the Scandinavian countries than elsewhere in Europe, although the borderlines there are tending to become more diffuse as well. See, for example, H. Rudolph, et al., Recurrent Education in the Federal Republic of Germany, in series "Recurrent Education. Policy and Development in OECD countries", OECD, 1972.

A somewhat different situation prevails in the United States, and also in Canada and Australia. On the one hand, the notion of national educational policy-making is accepted only in a limited way, with the federal administration intervening in principle mainly to compensate for the deficiencies of policy-making at other levels and in areas of direct national interest (such as the equality issue and its related compensatory programmes). On the other hand, the separation between the formal educational system and the informal provisions for adult education of all kinds are much less severe than in Europe, with the institutions of post-secondary education generally offering a great variety of credit-courses as part of their programme(1). Universities and colleges are also more willing than their European counterparts to provide courses that respond to concrete needs expressed by the economic sector and the private consumer.

But this integration in time and space between the formal post-secondary system and the informal "system" does not imply an integrated policy. It has been said that in the United States, adult education programmes are peripheral to the main purpose of the organisations engaged in them. In fact, so peripheral that there is an inverted relationship between the willingness to provide courses for adults and the prestige (read: security of funding) that the institution carries.

Great importance has been attached to job-related adult education in the Socialist countries and in many developing countries. These policies and experiences apply, certainly, to specific political contexts, but several of the reasons that led these countries to gear their educational systems to the direct needs of their newly created social systems also apply to some extent to the OECD Member countries.

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1) See Peter F. Regan, Norman Solkoff, Walter Stafford, Recurrent Education in the State of New York, in series: "Recurrent Education: Policy and Development in OECD Countries", OECD, 1972.



THE MAIN FEATURES OF A SYSTEM OF  
RECURRENT EDUCATION

Recurrent education is a comprehensive educational strategy for all post-compulsory or post-basic education, the essential characteristic of which is the distribution of education over the total life-span of the individual in a recurring way, i.e. in alternation with other activities, principally with work, but also with leisure(1) and retirement.

This definition of recurrent education contains two essential elements:

- a) It offers an alternative educational strategy to the conventional one by which all formal and full-time education is concentrated in youth, i.e. between the age of five, six, or 7(1) until the entry into active life, and it proposes to spread post-compulsory education over the full life-span of the individual. Thus it accepts the principle of lifelong learning.
- b) It proposes a frame within which lifelong learning will be organised, this being the alternation and effective interaction between education, as a structured learning situation, and other social activities during which incidental learning occurs.

Whatever the precise nature of this alternation, its essential characteristic is that of a continuity in learning through one's entire lifetime, in which a mutual fertilisation and enrichment takes place between the structured learning experience acquired in the education parts of the alternating patterns and

- 1) The word "leisure" is used here in the sense of periods of life in which the adult is not a member of the active labour-force, and not yet "retired" either; in other words, periods of "voluntary unemployment" as have always been the privilege of the very rich or the "socially irresponsible". If the futurologist's views become reality, this kind of leisure will become an accepted practice. In this context, the views as to the organisation of social life in a zero-growth society as expressed, for example, by Mr. Mansholt, the past President of the Commission of the European Economic Community, must also be kept in mind.
- 2) Or as from age three or four if early childhood education is generalised and if its function of schooling is given priority over its other possible functions.



the unstructured learning experience acquired in other types of social activity.

The detailed characteristics of a system of recurrent education cannot be outlined at this stage. It must, however, be stressed that it is not implied in the recurrent education proposition that the institutionalised type of schooling that characterises the contemporary formal educational system be imposed upon adults. It would be absurd to reproduce elsewhere the shortcomings of the conventional system. The main argument of this report is that the essence of the educational opportunities as provided to the young - to some only up to 14-15 years, to others, more privileged, up to 24-25 - should be made available to everyone throughout his entire lifetime. It is obvious that this implies a certain amount and type of "deschooling" and that other learning situations may be more appropriate for attaining this objective than the institutionalised school.

Recurrent education is meant, therefore, to encompass the total provision of education for adults, understood as education after compulsory, basic schooling. It is one comprehensive alternative strategy for what at present are three unrelated sectors:

- a) the conventional post-compulsory educational system that includes the last years of secondary education and the post-secondary system;
- b) on-the-job training of all kinds and at all levels, most of which is organised by the private sector; and,
- c) adult education in the more limited sense of the vast and manifold array of educational provisions for adults, which is mainly "information-culture"(1) or "general-education" oriented. The prototype of this are the "Volkshochschulen" in the German-speaking countries, and the "folkehøgskole" and voluntary study circles in the Scandinavian area(2). Its primary aim has traditionally been to give to large groups of the population, and especially those who left school at a relatively early age, access to general culture, and thus to give them personal and cultural enrichment.

1) The term is H. Janne's in "Permanent education, an agent of change", in Permanent Education, Council of Europe, Strasbourg, 1970.

2) See Å. Dalin, Recurrent Education in Norway, in series, "Recurrent Education: Policy and Development in OECD Countries", CERI/OECD, 1972.

Mass media are increasingly used as the main vehicle for the transmission of programmes in all three of the above sectors. It is understood that a recurrent education strategy must also embrace these programmes.

In many OECD Member countries, the two latter sectors are separated in systems terms from the compulsory and conventional post-compulsory educational system; also there is no co-ordination between the three sectors as regards policy-making, origin and allocation of resources, programme development, and certification. They fulfil, each in its own way, a complementary and to a great extent compensatory function: the job-related sector primarily complements full-time school education with specific vocational training, while the general-cultural programme primarily provides access to culture to those who were severed from its mainstream at an early stage in their educational career.

It must be added that, apart from, but closely connected to, these three above sectors, an array of "second chance" programmes for adults exists in which they can acquire educational qualifications that are in principle fully equivalent to those provided by institutionalised post-compulsory and, particularly in educationally less developed areas, compulsory education.

In the Scandinavian countries in particular, both the "folk high schools" and much of compensatory adult education are part of the regular educational system, or at least fall within the scope of educational policy, making up for the shortcomings of the regular educational system by providing adult education being one of the tasks of this policy.

A strategy for recurrent education would therefore embrace in a common policy framework all the separate systems that offer educational services above the basic or compulsory level, on the understanding that this framework also comprehends compulsory education. The specifically "recurrent" orientation of the policy sets in, however, after the period of compulsory schooling.

In fact, the question of whether one or the other type of adult or on-the-job education would or would not be integrated in or even absorbed by a future "system" of recurrent education is irrelevant. In a recurrent education policy, as in any other policy, some programmes will more directly serve the policy's key objectives than others, and in that, limited, sense, one could say that they are more "recurrent" than others. It is also possible that the stronger the connection between a particular programme and the key objectives, the more it would have to be "recurrent" in

the strict sense, i.e. be a period or stage of education that alternates with other social activities, and in terms of timing, location, and character is relatively autonomous.

In planning a recurrent education system, many extremely important lessons can, however, be drawn from the experience gained in the adult education sector. For several of the essential characteristics of such a system, adult education has already shown the way: its programmes are infinitely diversified and flexible, its relevance to the needs and expectations of adults is often remarkable, its accessibility on several counts well-gearred to the specific personal and socio-economic conditions of its clients.

Moreover, it has in the recent past shown a high capacity to adapt to new needs and utilise new technologies. In many cases, it offers a sound basis on which to construct elements of a recurrent education system, and its facilities in terms of physical resources and teachers will be an indispensable asset in a future system of recurrent education.

As a result of the different education and social objectives to which countries will give priority, systems of recurrent education will differ from country to country. There is, however, good reason to believe that the general principles that must be respected in constructing a system of recurrent education and the constraints to be taken into account will vary much less between countries than do their present education systems.

A system of recurrent education will be in much more intense interaction with society at large. It affects the organisation of work and leisure, and will be difficult to introduce without a close co-ordination with social, cultural, economic, and labour market policies. The constraints within which these policies are elaborated are becoming more similar in all developed countries.

This similarity will be further enhanced in the future by the increasing role of the internationalisation phenomena that have already begun to introduce a new dimension in individual countries' educational and social policies. Labour market implications are in fact not the only area that has consequences for a future system of recurrent education. The creation of new transnational mass media, education programmes of international firms, and education of "migrant" workers (i.e. those who move from one country to another, forced to search for new work whenever the host country no longer needs them) will also affect a future system of recurrent education.

The same basic principles should, irrespective of specific national settings, guide the elaboration of the main features of a recurrent education system. These principles are the following:

- a) the last years of compulsory education should provide a curriculum that gives to each pupil a real choice between further study and work;
- b) after leaving compulsory school, access to post-compulsory education should be guaranteed to the individual at appropriate times over his total life-cycle;
- c) distribution of facilities should be such as to make education as far as possible available to all individuals, wherever and whenever they need it;
- d) work and other social experience should be regarded as a basic element in admission rules and curricular design;
- e) it should be possible and important to pursue any career in an intermittent way, meaning an alternation between study and work;
- f) curricular design and content and teaching methodology should be designed in co-operation with the different interest groups involved (students, teachers, administrators, etc.) and adapted to the interests and motivation of different age and social groups;
- g) degrees and certificates should not be looked upon as an "end result" of an educational career but rather as steps and guides towards a process of lifelong education and lifelong career and personality development; and
- h) on completion of compulsory school, each individual should be given a right to periods of educational leave of absence with necessary provisions for job and social security.

The above list is not exhaustive. It must be stressed that all these principles and perhaps others still to be elaborated must be integrated in a recurrent education strategy. One or a few of these principles apply to many existing educational programmes for adults. Their weakness, however, lies in the fact that they give partial answers to a wholesale problem and that

they lift only some of the constraints in an overall individual and social situation(1).

It is of course self-evident that the practical application of the principles will need to take account of the need for efficiency in industry, administration and commerce. In particular, legal provisions and collective bargaining agreements must be adapted to the special difficulties in small firms, as well as to the need for special incentives for some social groups for whom participation in recurrent education is difficult.

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1) See for a particularly interesting analysis of such educational programmes in this context, Peter Regan, Norman Spiloff, Walter Stafford, "Recurrent Education in the State of New York", op. cit.

## Chapter 2

### RECURRENT EDUCATION AND EDUCATIONAL OBJECTIVES

#### INTRODUCTION

Policy objectives and the policies put into action to attain them interact. This obvious statement refers to a complex phenomenon, the precise nature of which varies from situation to situation. In the case of recurrent education, a particularly complex type of interaction is likely to occur, not only because of the multiplicity of objectives pursued in education and the fact that the operational objectives may differ strongly from the stated objectives, but because of the long time perspective of a recurrent education strategy, which leaves a large margin for shifts in priorities given to one or another objective as well as for changes in their interpretation.

Therefore, one of the crucial problems of recurrent education is that of the relationship between societal and educational objectives, and consequently between societal and educational change.

Generally speaking, two points of view are held regarding this relationship: the "optimistic" and the "realistic"(1). The optimistic view holds that it is possible to organise the future educational system in such a way that it will become an effective instrument for societal change. The realistic view sees this as fanciful, and holds that the operative values of society have to change before goals, structures, and content of education can be altered.

The difficulties encountered in attaining more equality of educational opportunity seem to give support to the "realistic" thesis. The failure of educational equality policies should not, however, be interpreted as definite proof of the inability of education to promote social change - whether planned or not. But

1) Educational Policies for the 1970s, Conference on Policies for Educational Growth, Paris, June 1970, Volume I, OECD, 1971.

it certainly contains a warning against undue optimism concerning the time needed for change to take place and the scope of the social change that educational policies can bring about.

However marginal education's impact on social change sometimes seems to be, there is good reason to believe that present educational policies could do more to attain such key objectives as equality of opportunity. Secondly, and in this context, more important, these effects would have a better chance of occurring if educational reforms, put into action in order to reach specific societal goals, were combined with reforms in other fields: labour market policy, economic policy, social policy, fiscal policy, housing and welfare policy, and job organisation(1).

In fact, this implies that both the realistic and the optimistic views are misrepresentations of the complex interaction between education and society: education is by nature an agent of change as well as an agent of conservation and tradition. It has on the one hand to be functionally adjusted to existing societal values and structures, on the other to challenge them and prepare the ground for societal change. However, the scope for education's innovation impact is determined by society's value-structures, by its receptivity, and also by the relevance of the available educational and social provisions to the individual's needs.

If one accepts this principle of the dual role of education in society, it has far-reaching implications for the discussion on recurrent education:

- a) Recurrent education is a proposal for an alternative educational strategy, the guiding principle of which is the fundamental right of the individual to decide his own future. One of the essential characteristics of the proposed new strategy proceeds from this: it implies getting away from a rigid institutionalised system that imposes its values and objectives upon its students, and developing a framework for participation in decision-making on all aspects of the system, including its objectives and ways and means to achieve them. But taken out of its social and political context, such a participation in decision-making is no more than

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1) These points are elaborated by T. Husén in Social Background and Educational Career, CERI/OECD, 1972.

a smoke-screen for a policy precisely the opposite of that which it is said to pursue. The ability to set one's own objectives and to choose between policies is precisely one of the outcomes of a recurrent education strategy aimed at providing full scope for individual development and real equality of educational opportunity. Hence there is no incompatibility between the fact that priority is given to these objectives and the principle of self-determination: the latter can become operative only if the above two goals are effectively attained. It may then also provide real freedom to set other, additional objectives and to question those objectives that have up to now been given priority.

- b) A statement on the objectives that recurrent education is expected to attain must be seen in this light. Recurrent education is meant to provide a more efficient strategy for achieving essential educational objectives than the traditional system. The chief motivation for recurrent education stems from dissatisfaction with the performance of the present educational system and the conviction that its further straightforward expansion will not improve, and might indeed worsen the situation. In the following, some key goals of educational policy will be considered in this light: individual development, equality of opportunity, and the interplay between education and society (particularly in connection with the labour market).

#### INDIVIDUAL DEVELOPMENT

Potentially recurrent education can offer better opportunities than the present system for the full development of the individual's abilities, in line with his motivations and his interests. This statement is supported by two main arguments:

- a) The interaction between hereditary and environmental factors in the development of human competence, and in particular intelligence(1): whatever the part of the innate, the development of intelligence or ability in any socially meaningful sense is a function of interest

1) See for a fuller discussion: Husén, op. cit.



in or motivation towards certain accomplishments, a motivation in its turn strongly dependent on the physical and social environment in which the individual lives. Ability is in continuous evolution during the entire course of human life and this evolution stands in close connection with stimulation provided by the environment. However, in order to become operationally utilisable, "raw" ability must be shaped by the mould of education, though not necessarily in school.

Motivation for learning varies according to different individual development patterns. The phenomenon of "school weariness" affects high numbers of children and adolescents of all social classes. However, here again, social background plays a decisive rôle: the higher the pupil's social class background, the greater the probability that external pressures (from home, peer group, and teachers) will compensate for lack of motivation.

- b.) A second potential source of motivation for learning is "real life" experience. In the present uninterrupted, highly structured and sequenced system of youth education, it becomes effective only when pupils have taken the irrevocable step of leaving school and entering the labour market. Participation in adult education programmes is inspired to a great extent by the belated awakening to the benefits of education for one's own full individual development and one's chances in life.

The guiding principle for a recurrent education system as seen in the perspective of lifelong development of the individual is that of self-sustained and self-controlled learning and development process. An essential condition for this is that the learning situation be perceived as relevant to the learner's interests and as potentially contributing to his own further development and ability to play a meaningful role in the several situations in which he is involved: family, work, social, cultural, and political.

The means of recurrent education for improving the opportunities for lifelong individual development are partly contained in the alternation process, which potentially provides more incentives to learning than an uninterrupted school experience. For these incentives to become effective, however, and notably to counteract the disincentives arising from poor social and cultural

environments and from an unchallenging work situation, information and guidance must be available, and especially for those with low motivation for taking up studies.

Without this, recurrent education is likely to further widen the gap between the more and less educated, and the groups involved in high-level, challenging work and those in low-level, unchallenging work.

#### EQUALITY OF OPPORTUNITY

The present discussion around the "equality of opportunity" issue is dominated by opposed views as to the fundamental constraints on the impact of education in society. The basic question being raised is whether equality in education is possible in an unequal society and, furthermore, whether education has the duty and the potential to bring about a more equal society.

One of the essential motivations for introducing recurrent education is that it is expected to be a better strategy than the present for achieving educational and, through the social equality, not only does it propose a new strategy for this, however, but it affects also the meaning given to the equality objective, both in its strictly educational and in its wider social connotations.

The failure of education to offer equal opportunities to all children has been a constant theme in educational discussion and research in the last few years. Husen has recently reviewed the most relevant research findings relating to the interaction between educational opportunity and achievement on the one hand, and social background on the other(1).

He argues that "research hitherto has focussed almost entirely on the question of how much scholastic aptitude can be attributed to heredity and how much to environment". Educational policy-making should concentrate on the environmental variables and particularly attempt to act on "process variables". Differentiated treatment to compensate for disadvantaged socio-economic conditions should be a central feature of educational policy. The teaching and the certification functions of the school should be separated, with the school's function being to teach and not to act as a gate-keeper to vocational careers. The

1) T. Husen, Social Background and Educational Career, op. cit.

institutionalised school is "information-rich but action-poor"; it should develop the ability in its students to apply absorbed knowledge and, by thus shifting stress from docile and abstract-verbal to active and concrete-applied behaviour as its teaching target, improve its means for bringing culturally impoverished pupils into the "mainstream".

Hence redefining the school's potential to attain greater equality of opportunity has implications for the criteria on which educational achievement is defined and measured as well. The school tends to use for achievement-measuring a one-dimensional scale on which the children are placed in a straightforward rank order - a practice that suits the sorting-out role to which undue weight is often given.

It is widely recognised that the concept of what education should attempt to achieve, and what the achievement criteria will be, needs to be revised, for two reasons:

- a) There exists an intrinsic inequality towards the different social groups in current achievement criteria. The dilemma in which the schools are placed is that in a school system that imparts knowledge via verbal and numerical symbols and in a society in which this knowledge is too highly valued, a change in achievement criteria cannot be carried out without a change in the overall school system, and, ultimately, in society's value system.
- b) Educational achievement is not relevant to the tasks that man in modern society is called upon to perform in his different functions: work, home, neighbourhood, cultural, and political setting, etc. Here again, the dilemma is one of values and of political priorities over which education alone has no control. Any change in this matter must relate to changes in society and particularly the importance attached to these various functions - and most of all to the valuation of functions other than work alone.

Modification of the school's achievement criteria, in the direction of attaching less importance to the ability to manipulate symbols, whether inspired by the desire to offer more opportunity or by concern about the irrelevance of verbal-abstract ability to the various functions of society, has to be seen against

this wider socio-cultural and political background and the severe constraints that it imposes on such a shift in values and priorities.

Changes in the school curricula in this direction are therefore only possible in the long-term and if embedded in the larger context referred to above.

Whereas intra-generational inequality has been at the core of educational discussions, inter-generational or between-generation inequality has only recently been given attention in relation to a new educational strategy. It results from the rapid expansion of educational participation in the recent past. The phenomenon of a wide disparity between the young and the older generations in terms of the average years of schooling or the educational level they attain can be observed in all OECD Member countries. The gap between generations will exist as long as the average length of years of schooling continues to increase, and its effects will be felt for a long time after this process has come to a halt. The problem is particularly acute for the age groups over 30. In Norway in 1965, 75 per cent of those over 40 had only seven or less years of basic education. In Sweden, even in 1980, nearly 75 per cent of people over 40 will have had only elementary schooling if the present resource distribution between youth and adult education remains unchanged.

The other type of inequality referred to above is intra-generational educational inequality, the most striking feature of which is inequality in educational participation or achievement between social groups. Disparities on both counts between groups are considerable and have not, on the whole, been affected profoundly by the massive expansion of the recent past(1). At the secondary level, disparities in overall participation are decreasing as a result of the advent of universal schooling at this level (although the OECD Member countries show very great differences as to the distance still to be covered before this aim has been achieved). But in those Member countries that have maintained parallel types of secondary schools, a more subtle type of social selection can be observed, consisting of an unequal distribution over the several parallel secondary tracks

1) For data and analysis, see: Group Disparities in Educational Participation and Achievement, by Charles Nam (Part I, on Participation) and Asa Sohlman (Part II, on Achievement). Vol. IV, Conference on Policies for Educational Growth, Paris, 3rd-5th June, 1970, OECD, Paris, 1971. Also Husén, op.cit.

and/or programmes, with a heavy bias for the upper and middle social strata toward the curricula that assure eligibility for post-secondary programmes. In those few countries where secondary education is comprehensive, social selection has been reduced, but traces persist in the choice of subjects and distribution of pupils over university-preparatory and other curricula(1).

At the post-secondary level, in absolute terms the number of students from the lower social groups has considerably increased, and in many cases the rate of increase in numbers has been higher than for higher social groups. However, considerable disparities as to participation rates continue to exist.

Beneath these considerations as to the chances that, sooner or later, mass participation in upper secondary and even in post-secondary education will be achieved lies the day-to-day reality of the fate of very many children who leave school before or at the beginning of adolescence without any - or with very insufficient - educational or vocational qualifications and, what is more serious in view of their motivation to return to any type of education at a later age, with a frustrating school experience. Participation forecasts show that even in 1980, in several Member countries substantial percentages of youngsters will have left school before they are 16 or even 15(2). But data concerning the age at which pupils leave school give a very distorted picture of their real level of education. In many countries, substantial percentages of children leave school without having successfully completed primary school and other important numbers leave without any professional qualifications. The distribution of these percentages over the social groups reveals the lower groups to be the most detrimentally affected.

Both in absolute terms and in terms of the handicap upon entering society (and in particular the labour market), the above-mentioned intra-generational inequality below the post-secondary level, and a fortiori at the level of elementary or junior secondary education, is a much more urgent and difficult problem

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1) For data and analysis in Sweden, see: K. Harnqvist and J. Bengtsson, Educational Reforms and Educational Equality, The Institute of Education, University of G8teborg, 1972.

2) Enrolment forecasts provided by countries to the OECD for the 1970 Conference on Policies for Educational Growth.

than equality at the post-secondary level(1). When it comes to establishing priorities in a future policy of recurrent education, this consideration will have to weigh very heavily in the balance. Concretely, this implies that priority will have to be given to secondary rather than to post-secondary courses.

The chances that the present institutionalised educational system will succeed in the foreseeable future in eliminating or substantially reducing intra-group inequalities in education are slim.

An equality policy in which high priority would be given to strategies for compensation in a much more systematic manner than at present is widely advocated. But in order to produce durable results, a more profound renewal of education is probably needed, bearing on the nature of the educational experience, on the relations between school and community, on an overhaul of the curricula of compulsory education, and on a re-evaluation in particular of the role of observation, experience, and sense for a practical, problem-solving approach. Moreover, coordination between educational policy and socio-economic policies would be needed, which would in turn require the creation of administrative conditions for such a coordination. If all this can be achieved, compensatory education in the sense of special programmes might not be needed, as it is now, for the majority of children, but only for a small group of severely handicapped.

Moderate pessimism is justified as to the likelihood of such a compensation and innovation policy being decided upon. In order to succeed, compensation programmes need more and other resources than have hitherto been allocated to them and they must go hand-in-hand with socio-cultural and economic measures(2).

This leaves a double task for recurrent education:

- a) A "compensation" task, i.e. to compensate for the inequalities of the present and near future (and even medium-term future) educational system; and
- b) its "real" and permanent task of spreading educational opportunity over a longer period of an individual's life.

1) See for a discussion on this, Jarl Bengtsson, The Swedish View of Recurrent Education, in series "Recurrent Education, Policy and Development in OECD Countries", CERI/OECD, Paris, 1972 (mimeographed document).

2) This is one of the main conclusions of the analysis of the United States compensatory programmes reported in Strategies of Compensation, by A. Little and C. Smith, OECD/CERI, 1972.

The term "overbridging education" has been proposed for the "compensatory" role that recurrent education should play in reducing inter-generational inequality.

Because of the rapid expansion of education in the recent past, the older generation, who to a great extent pay for the young, must perceive with some resentment how rapidly the gap between them and the younger generation is growing. With the increasing awareness of the injustice this implies, of the better chances in life given to youth, of the burden that the rising cost of youth education represents for national budgets as well as for their own pockets, and, in many cases, of the developing discrepancy between the beliefs and values they cherish and those of the younger generation, the pressure for putting a curb on youth education and shifting resources to second-chance or "overbridging" education in favour of the older generation may become a political factor with which policy-makers will have to reckon.

The second role of recurrent education, i.e. that of spreading educational opportunity over a longer period of an individual's life, is of a permanent nature and is its real vocation. Spreading educational opportunity over a lifetime can provide a strong incentive to students for entering the labour market as soon as they have obtained the necessary (or even the minimum) educational and professional qualifications. This is contrary to the present situation where, because of the premium put on length of schooling in terms of chances in the labour market and position on the status ladder, students are motivated to stay in the educational system as long as possible. The second powerful motive for staying on is the irrevocable nature of the educational chances seized during youth education.

There is no doubt that the present choice-process favours students with a highly education-motivated home background. The parents' education appears to be the most significant process variable affecting children's school careers(1). Thus the process as it functions nowadays inevitably produces unequal educational opportunity.

Secondly, the students' own motivation does not always coincide with the present age span of schooling. Motivation for studying may come later in life, particularly in those cases where it did not come from the home or the environment. Work

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1) See Group Disparities in Educational Participation and Achievement, op. cit.



experience and its challenges, the realisation of the handicap that a poor youth education represents for building a career, a desire to develop hitherto unexploited and newly discovered abilities and interests, or simply thirst for knowledge or need for a period of reflection and personal enrichment can be some of many sources of inspiration for adult study.

It seems fair to assume that a recurrent education system conceived as a permanent feature of life and career planning will contribute to a better distribution of educational opportunity and, to the extent that education, life, and career chances are related, of "life" opportunity.

However, such a system will deserve the name "policy" only if it provides all those concerned with the education and career planning required with the necessary information and motivation. Without this, there is a serious risk that the decision to stay on at school or to enter the labour market, as well as the decision to return to education in a recurrent education system, will continue to be determined by social background, level of education of parents, and stimulation provided by living and working environment, etc. - all factors that are strongly socially biased. Recurrent education could thus lead to an increase in inequality that would be much more difficult to counter than the present inequality(1).

Hence the importance of recruitment activities, to which attention will be given later in this paper.

#### THE WORLD OF WORK

Increasingly rapid technological change and the continuous transformation of the organisational patterns of work have a direct impact on the conditions that the individual meets and shapes in his work situation. At the level of the labour market, the need for skilled manpower in both quantitative and qualitative terms depends on more and more complex national and international developments.

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1) The decline in numbers of first admissions to higher education in Sweden and, since Autumn 1972, in France as well, could be seen as a healthy self-regulating process if it were motivated by arguments other than fear of not finding a job on completion of higher education. It must be feared that in the present situation, this trend to stay away from higher education reinforces social selection.



As a result, it is becoming difficult to ensure a satisfactory interplay between the world of work and the educational system. Forecasting occupational structures has become very difficult, and manpower planning a less and less useful aid to educational planning. At the level of the individual, educational certificates continue to serve, perhaps for lack of better criteria, as entrance tickets to the labour market, but this marginal interaction does not guarantee that what is taught in the schools corresponds to what is expected from people in their jobs.

These problems have made acute the question of the function that education, understood as education provided within the formal school system, should fulfil as regards work requirements and, on the system's level, the labour market. The argument can be advanced that education should not in any way certify students' vocational qualifications, but leave this to the world of work. While this may be accepted, it does not solve the problem, as there is also growing support for the thesis that the distinction between "general" and "vocational" education is meaningless. If this is accepted, it would make no sense to restrict the role of the educational system to providing general education and leave vocational education - and certification - to industry.

The response of the education system to these changing requirements has been to lengthen the period of general education. By broadening the curricula, transfers between parallel programmes have been facilitated and the choice of a specific educational career postponed. The ability of the educational system to respond to rapidly changing demands was expected to increase through these measures. But the response on the side of the world of work has been much more relevant: the strong growth of on-the-job training has provided an answer to the need for a quick adaptation of people's knowledge and skills to changing work requirements. On the other hand, educational diplomas and degrees have lost their permanent validity.

The overall result of these adaptations in education and industry has satisfied no one. On both sides, insight into the nature of the relation between the functions of school education and on-the-job training was lacking. On the education side, no analysis was made of the several components of "general education" and it was perhaps too readily assumed that the component "general culture" was the only relevant one.

The major weakness, however, has been a certain shortsightedness concerning the qualities needed to survive in an anonymous technological society in general and in the working environment (taken in the larger sense, i.e. including not only paid jobs, but also, for example, the work of housewives) in particular. These requirements have much to do with the alienation to which life in our production and consumption-oriented society leads us. They are also related to the ability to define one's own role and make the appropriate choices as to one's life in its entirety.

Concerning the world of work, this means making the right choices about one's own career. The number of these choices and the frequency at which they have to be made are rapidly increasing. Also at stake are the ability and the real possibility to participate in the decision-making and implementation of decisions concerning all aspects of the work environment(1).

The main task of recurrent education as related to the world of work consists in providing a suitable environment for these qualities to develop. This is more than a matter of imparting knowledge and skills. It implies a change in the organisation of the learning situation over the whole line, i.e. as much in compulsory as in post-compulsory education, and as much in the actual work situation as in the school situation.

The difficulties in forecasting labour market needs are likely to increase as a result of the acceleration of social and technological progress, of the rapid creation of new knowledge and its instant application, and also of the creation of new international trade blocs. Occupational and regional flexibility and mobility will be required to a very high degree.

In the narrow context of the rapidly changing needs for skilled manpower, a system of recurrent education could provide the necessary flexibility. This is not identical to introducing programmes that impart new vocational skills or adapt such skills to new technological developments. The words "vocational skills" have a narrow connotation that is not compatible with the nature and orientation of a recurrent education policy: the occupational flexibility that is needed in a technological society during one's entire professional career requires as much new attitudes, judgement as to one's own abilities, career planning, and ability to make choices as vocational skill and knowledge in the strict sense.

1) See for an analysis of the discussion and a report of the realisations as to this: A. Dølin, Recurrent Education in Norway, op. cit.

A second function that could be assigned to recurrent education in the framework of labour market policy is that of acting as a regulating instrument during periods or within sectors of unemployment (or of risk of unemployment): recurrent education could be used as an alternative to a "conservatory" unemployment policy. Those whose skills have become inadequate for coping with changing techniques or unmarketable for other economic reasons would be encouraged and enabled to enrol in recurrent education. Thus they would not only increase their own chances in the labour market, but also become a manpower reserve on which the various countries' economies could draw. Such programmes of recurrent education would, however, fail in their purpose if they were planned in terms of immediate labour market needs and not primarily decided upon by the participating individuals. They will also have to reckon with the strong social bias built into every supply of services that distorts the demand and makes it fail to attain the objectives that one had set out to achieve: the incentives to participate in such recurrent education programmes may be inversely related to people's real needs for further education. It must, therefore, be repeated that a policy of recruitment and guidance should be pursued simultaneously.

#### EDUCATION AND KNOWLEDGE

Society is becoming more and more a "knowledge society". Drucker(1) has shown that the "knowledge industries", producing and distributing ideas and information rather than goods and services, accounted for one-quarter of the United States gross national product in 1955. This was already three times the proportion of the national product that the country spent on the "knowledge sector" in 1900. Yet by 1965, just ten years later, the knowledge sector was taking one-third of a much bigger national product. In the late 1970s it will account for half of the total national product. Every other dollar earned and spent in the American economy will be earned by producing and distributing ideas and information, or spent on procuring ideas and information. The old capital-labour relationship is being replaced by a capital-knowledge-labour relationship, with competence and skills based on knowledge playing an increasingly important role.

1) P.F. Drucker, "The Knowledge Society", in New Society, 24th April, 1969.

The word "knowledge" stands in this context, however, for more than factual knowledge. It also means the ability to use knowledge in order to discriminate and to judge, which is more a matter of having a set of relevant concepts at one's disposal than knowing the facts. It is not the obsolescence of factual knowledge but the inability to renew one's concepts and to make appropriate use of them that has the most serious consequences for people's ability to function in the various situations in which they are placed. In the context of the work situation, this is the greatest obstacle to participation of workers in self-management.

A second important aspect relates to the distribution of knowledge in society. As the production and application of knowledge tends to be controlled by the few, the possibilities for realising a participatory society diminish and the risks of alienation of man in his working and living environment increase. Hence the "knowledge and control" issue(1) is receiving more and more attention as one of the basic issues in industrial society.

The potential of recurrent education to contribute to solving this complex cluster of problems will be determined by its ability to give the individual real access to knowledge, its creation, and its use. From the above, it follows that this is not a matter of facts and of obsolescence of facts, but of a restructuring of the interaction between the creation of, access to, use of, and control over knowledge in terms of the individual's relation to these issues.

#### THE LARGER CONTEXT

A full analysis of the interaction between education and society is beyond the scope of this report. Two aspects of this interaction, however, need to be mentioned at this point: the risk of a growing dichotomy between the value system in education and that of society, and the alienation of man in a technological and bureaucratic world. The present acute awareness of the need to preserve the environment and to master pollution could be added as a third issue, although the suggestions to which this concern has given rise in connection with the role of recurrent education overlap greatly with those relating to the other two aspects.

1) See notably Knowledge and Control, edited by M. Young, Routledge and Kegan Paul, London, 1971.

The gap between value systems does not start when young people leave school. In contemporary educational discussion it is stressed that there are great discrepancies between the intentions, life expectations, and attitudes for which schools stand, and those that the child meets at home, in his peer group, and in his neighbourhood (1). One of the key motives given for breaking with the practice of uninterrupted full-time schooling is that this might help to decrease this dichotomy. With youth education reaching beyond adolescence into adulthood, most young people have developed their personalities and acquired the essentials of their beliefs and attitudes by the time they leave school. On entering "active life", they are often confronted with very different value systems. The danger is not so much that of a clash, but of a growing irrelevance of school education to students' and adults' interests.

This is only one aspect of the previously mentioned alienation problem observed in schools and universities. Alienation is a symptom of the basic failure of modern society to respond to people's most essential aspirations. Mention has already been made of its appearance in the work situation. But it has also been observed in other sectors of society: in political behaviour, in consumer attitudes, in human relations in general, and in behaviour towards health and social benefits provisions.

The desirability of a further expansion of the traditional educational systems catering exclusively for the younger generation must be seen in this context. The arguments against such a further expansion are also inspired by the conviction that the time has come to give more attention to second-chance education for adults.

The resources problem has inspired many countries - among them some in which access to post-secondary education was traditionally open to all those who possessed the appropriate secondary school-leaving certificate - to restrict the number of students in higher education. In other cases, the uncertainty of finding a job after they have left higher education has discouraged qualified candidates from enrolling in post-secondary education.

This enforced or voluntary restriction in youth enrolments in post-secondary education could be of positive value if it were appropriately utilised in a recurrent education policy. If not,

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1) See for an analysis of this problem in France the above-mentioned report of the Joxe Commission.

it may have undesirable effects on the democratisation of post-secondary education, as already indicated. If it were embedded in a recurrent education policy, it could restore the balance between youth and adult participation in education, as the open places in the post-secondary institutions could be filled by "recurring" adult students. But in order to make such a "return" of adults possible, it would be necessary both that post-secondary programmes and training approaches be geared to the specific needs of these adults, and that those who abandon studies be given a real chance of returning to education at a later age. As things stand, universities may well open their doors to adults in order to fill the empty places, guarantee full employment of their staff, and maintain their level of funding. But in the absence of a recurrent education policy, such emergency measures have serious drawbacks, and are unlikely to help in achieving a better interplay between education on the one hand and society's needs and the individual's aspirations on the other.

Recurrent education cannot be the panacea for all these problems, some of which require immediate short-term solutions. But it is one thing to adopt these measures without offering an alternative and without any evaluation of their broader and long-term implications for the individual and for society, and quite another to adopt them as part of a valid alternative strategy.

#### CONCLUSION

Each of these objectives has by nature a twofold orientation: that of adaptation and that of emancipation. It is necessary to serve the transmission of knowledge, aptitudes, and attitudes as well as the creation of new knowledge, aptitudes, and attitudes, and to help the individual adapt to what will be asked of him in society, while providing him with the capacity and tools to change society. This fundamental quandary applies to the equality objective as well. The dilemma is also clearly demonstrated in the socio-economic dimension: recurrent education is expected both to achieve a better adaptation of education to the labour market, and to emancipate the individual from socio-economic constraints.

Once it is accepted that the dilemma outlined above is a fundamental characteristic of all educational policy objectives and therefore those of recurrent education as well, it is appropriate to question whether in this respect recurrent education has anything new to contribute.

The conventional educational system shows an increasing inability to meet students' aspirations, and is failing to effectively prepare them for the creative role that they desire to play in society. In an increasingly technological and bureaucratic world, a shift towards a more emancipatory strategy such as recurrent education may represent would benefit both the individual and society.

The basic assumption underlying this report is that the strategy being proposed under the label "recurrent education" has the potential to facilitate such a shift in each of the goal areas discussed above, i.e. to provide better opportunities for individual development, greater educational and social equality, and better interplay between the educational and other social sectors, including a better contribution to the potential for necessary economic growth. The credibility of this optimistic assumption is based on the nature and scope of the proposed policy instruments, which acknowledge the increased rate of change in modern technological society and the growing interdependency among the several social sectors. The implication of these developments for education is that a new strategic position must be provided, both in its relation to society and its place in the individual's life career. In doing this, it should be borne in mind that the educational sector is not autonomous and that educational policies can be effective only if co-ordinated with policy measures in other social fields. If this is not done, its potential ability to be an instrument of individual and social creativity and emancipation will be considerably reduced.

Part Two

RECURRENT EDUCATION:  
ITS EDUCATIONAL AND SOCIAL IMPLICATIONS



## Chapter 1

### IMPLICATIONS FOR THE PRESENT EDUCATIONAL SYSTEM

#### INTRODUCTION

The introduction of recurrent education necessitates radical changes in the structure of the conventional educational system and a re-assessment of the objectives it pursues. A major question that arises is at what stage recurrent education in the sense of alternating education with work or other activities should start. At present, the enrolment growth in post-secondary education constitutes the key educational problem in many OECD Member countries. Recurrent education has attracted great interest in these countries as a possible alternative to the continuous growth of higher education. However, the problems in higher education are to a great extent a function of the structures and objectives of secondary, and consequently a reorganisation of secondary education is of vital importance for the development of the post-secondary towards a system of recurrent education.

The recent development of secondary and higher education has shown that the likelihood of reaching a given educational objective depends in a decisive manner on the nature of administrative and structural arrangements and on their co-ordination. It has also become clear that there is a close interdependence between levels of education; expansion at the secondary level creates pressure at the higher level, reforms of arithmetic syllabi, or of methods of primary reading greatly affect the secondary level, changes in admission policies of universities affect choices of subjects or programmes in secondary school, etc. If anything is to be learned from recent experience, it is that educational policies must be co-ordinated and comprehensive.

Hence the introduction of recurrent education, if it is to be successful, must be part of a wider policy for educational

change in which all types and levels are carefully co-ordinated, and account is taken of their interaction. Recurrent education will necessitate reforms in curricula and structure, both at the compulsory and post-compulsory level. It also implies bringing upper secondary and post-secondary education together into one flexible and integrated system.

RECURRENCE, COMPULSORY,  
AND SECONDARY EDUCATION

In the first place, upper secondary education programmes need to be restructured in order to be brought into the framework of recurrent education. If alternation between recurrent education and work begins after the completion of compulsory schooling, it can be anticipated that many young people from the age of 16 or 17 will leave school to seek temporary employment or other meaningful activity. This raises the problem of including "terminal" characteristics in all educational programmes for the years preceding this alternating period, i.e. in upper secondary or even at the end of "compulsory" school. However, the question of when, in terms of educational attainment and social maturity, this alternation between recurrent education and other activities could commence can be answered only in a specific country, and perhaps regional, context. It will notably depend on current and planned duration of compulsory education, the organisational structure of the first cycle of secondary education, and the extent to which a sufficient number of appropriate jobs or other social activities are available.

Irrespective of the exact age level at which recurrent education should start, the programme of the last years of compulsory education needs to develop a closer integration between general and vocation-oriented education. It should improve the general basis for those who embark on a more vocational-oriented education, and provide those who follow a general educational programme with basic vocational notions and concepts. At present, pupils leaving secondary school have no free choice: certain streams leave no alternative to higher education, others no possibility for entering it. Therefore, the main task of future upper secondary education should be to give each pupil basic preparation for a vocation as well as preparation for further study, and thereby offer all pupils, including those in the more general-oriented

streams, the possibility of a period of meaningful work before later returning to study. Such changes in upper secondary school are also a sine qua non if it became a generalised practice to acquire work or other social experience before entering upon further education.

This means that secondary school curricula with a heavy "humanistic" bias must be revised. Curricula must, therefore, be re-oriented towards the technical-industrial and the socio-cultural aspects of modern society, which have been largely ignored by the traditional secondary school. The historic aspects of present-day society need not therefore be neglected. This is no doubt one of the most arduous tasks confronting secondary education, and the viability of the proposal to make this stage the starting point of a system of recurrent education depends to a high degree on its success.

It must be repeated that the main long-term task of recurrent education is not to make up for the shortcomings of youth education, i.e. to compensate for the deficiencies of compulsory education in providing equality of opportunity, in relating its programme meaningfully to society, and in offering full opportunities for individual development. Its task is to offer in relation to equality of opportunity, relevance of programmes and opportunity for individual development, a new dimension that youth education is intrinsically unable to provide.

The main task of compulsory education is to provide all young people with the basic knowledge, attitudes, and skills that will allow them to fully profit from the possibilities for educational, personal, and professional development offered to them on leaving compulsory schooling. The achievement of this objective assumes that certain minimum levels are set that have to be reached by everyone except, perhaps, by a small percentage of severely intellectually disadvantaged: however, this group is in no way identical in size and composition to the high percentage disadvantaged by the actual youth educational system.

The concept of "compensatory education" for socially-disadvantaged people inadequately expresses what strategy is required for achieving this aim, as it implies accepting the idea that compulsory level education would permanently and by definition be unsuited to the needs of this group. The aim should be to make mastery of the above-mentioned common minimum targets the task of

the "normal" system. The concept of "mastery learning"(1) as advanced in recent years embodies this notion of a minimum educational target for all pupils to be achieved by radically diversifying time, approach, and resources according to pupils' needs. It implies abandoning uniform approaches, and makes concrete the vague notion of "individualised teaching".

In this context, one may advance the thesis that a priority task of compulsory education is to provide a common basis for all youth, and that this implies that the target of developing individual talent through diversified curricula must be given a lower priority at this stage.

#### RECURRENT AND POST-SECONDARY EDUCATION

In several ways, post-secondary education in the OECD Member countries has recently been developing in a direction that favours the introduction of a system of recurrent education(2). Two of these trends are to be particularly mentioned:

- a) The trend to divide long university programmes into several shorter "units", leading to certificates that provide access both to a profession and to the higher stages of the programme(3); and
- b) access to university-type post-secondary education is being widened to include pupils coming from non-academic secondary programmes. As a result, the dividing line between university and "other" post-secondary education is becoming blurred.

The advancement of new policies for the total post-secondary field is of primary concern to most OECD Member countries. The general concepts around which the new policies are formulated are: greater variety in programmes, and shorter and possibly less expensive programmes. Furthermore, it is beginning to be recognised

- 1) See Mastery Learning, Theory and Practice, edited by James H. Block, Holt, Rinehart and Winston, New York, 1971.
- 2) See for an analysis of these trends Towards New Structures in Post-Secondary Education, OECD, 1971.
- 3) Such a policy is advocated in Less Time, More Options. Education beyond the High School. A Special Report and Recommendations by The Carnegie Commission on Higher Education, January 1971, McGraw Hill, New York.

that a great deal of relevant education takes place outside the formal educational system and that this must be taken into account.

The most prominent feature of these new policies has been the establishment of short-cycle institutions of post-secondary education(1). One of the unstated intentions of this policy was to direct students away from overcrowded universities and to create a "binary" system. This would in fact allow the universities to continue exercising their traditional role and maintain their status as high-prestige institutions.

The problems that have emerged, however, are formidable. In many cases, the new institutions strive to gain the same prestige as the "long", traditional institutions by raising standards, stiffening admission conditions, and lengthening courses. Students often turn away from the programmes that provide occupational qualifications and prefer those programmes that allow them to transfer to "long"-cycle institutions. But it must be added that in some instances the policy has been successful, and that the new institutions are more popular among students than the conventional ones. The "district colleges" in Norway are a case in point.

While the above-described trends in post-secondary education contribute, no doubt, to creating favourable conditions for a system of recurrent education, they are in no way sufficient, as they are not part of an overall restructuring of post-compulsory education, nor are they co-ordinated with related innovations in other social sectors.

The post-secondary system as part of a recurrent education system must become a system structured in several levels and organised so as to allow students to progress at different speeds in the various programmes and subjects. In general, its organisation should offer sufficient variation and be flexible enough to respond to the needs of a clientele whose expectations, former learning experience, and home and neighbourhood environment are much more diversified than that of the present student population.

These conditions cannot be fulfilled if recurrent education is organised on a strict year and grade basis. Instead, its recipients must be able to take up and leave studies throughout their lives, whenever their situations allow or require it. This also implies that courses are no longer exclusively full-time.

1) See the background papers for the OECD Meeting on Short-Cycle Higher Education, held in Grenoble on 15th-17th November, 1971 (series of roneoed documents, publication forthcoming).

Part-time variants of equal standing and quality must be included in order to increase the flexibility of the system. This will also facilitate making existing adult educational programmes part of a recurrent education system.

Another conclusion to be drawn from the foregoing is that a system of "capitalisable units" or "capitalisable modules" may need to be introduced. A great variety of flexible combinations of such modules, based on subjects and on combinations of subjects, would be possible. These would better respond to the needs of both the labour market and the individual than the present qualifications or degrees, and would also allow students to interrupt their education and resume it at some later date in accordance with their particular situations. However, it will be important to avoid a rigid system of certificates in relation to a system of capitalisable units, which would be contrary to the generally welcome trend towards more integrated and interdisciplinary approaches.

Adults with vocational experience who enrol in recurrent education will have different expectations to those who enter the system immediately on completing secondary school. Their age and experience will make them more exigent than many young students as regards the relevance of the programmes to their needs. But their demands will often be unexpressed and they will need to be given the opportunity to make concrete choices. Hence the importance of active participation in decisions on programmes as an essential feature of such a system.

Policies for post-secondary education have assumed that the distribution of students over the various fields of study will more or less automatically be proportional to the later available career opportunities. However, under present conditions, the time lag between entry into higher education and entry into employment often results in a serious disproportion in the output of the educational system and the careers available. One of the main tasks of recurrent education at this stage will be to replace the present inflexible "one-time" relation between supply and demand with a "many-timed" relation.

Such profound changes of post-secondary education pose, however, the problem of the future relation between knowledge production (or research) on the one hand and knowledge distribution

(or teaching and knowledge application) on the other. While this is not the place to analyse this complex issue, it is obvious that new ways of integrating them must be found, if the hypothesis that these fields profit from each other and cannot be carried out in isolation is correct.

At the institutional level, it is difficult to imagine how an effective integration between teaching and research can be organised wherever recurrent education programmes will be provided. New ways of demonstrating the relevance of research to its applications will have to be found if recurrent education is not to reinforce the split between research and teaching, or alternatively, research is not to be so decentralised that its quality is endangered. The first task to be carried out in this context is to determine which types of research activity have a direct potential relevance to learning as it is understood in recurrent education discussion. Inasmuch as research involvement is a means of developing critical understanding, it needs to be an integral part of any recurrent education programme. "Self-learning" and "self-assessment", planning one's own educational career, and choosing between the many available options demand the development of abilities that can be acquired only through involvement in "didactic research".

#### ADMISSION AND EVALUATION

Another important aspect of recurrent education on which we have already touched is admissions policies. In most OECD Member countries, admission rules maintain a strict separation between secondary and higher education, and often reinforce social selection. One of the basic ideas embodied in recurrent education is the departure from the practice of having a uniform academic frame of reference as a basis for admission. Relevant working experience must be taken into account in the admission rules in order to achieve a better integration between education and working life. Such admissions policy will also encourage the individual to enter the labour market for some years after completing compulsory schooling or upper secondary school, because he will be able to profit from his working experience in terms of "credits" when he decides to return to study.

Furthermore, admissions are closely linked to evaluation and to grading, degree structures, and certification, and all are closely related to the objectives of the recurrent



education programme. The critical criterion in this context is the fact that recurrent education is always intermittent: it follows upon and precedes a period of other activity. This is the principal way in which it differs from the present educational system, which always leads to a final stage, remunerated by a certificate giving access to a profession.

One of the implications of this admissions policy is that not only the educational experience obtained in a foregoing period of education but also the experience, knowledge, and aptitudes acquired in the intermittent periods of work (or leisure) will need to be assessed and taken into account.

The concept as such of strict sets of admissions criteria for specific programmes and the practice of refusing entry to those candidates who do not meet these criteria are not compatible with the idea of recurrent education. Whenever the individual would like to be involved in further education, an assessment will need to be made of his experience and aptitudes in order to advise him on which courses he would best enter.

How can the "credentials barrier" be broken?(1) It is clear that recurrent education will suffer if the role of certificates and degrees, their structure and nature, cannot be fundamentally changed.

At this juncture, a few points can be made that apply, certainly, to all education but that occupy a key place in a recurrent education strategy:

- a) Evaluation in a recurrent education system needs to be pragmatic, i.e. "problem-oriented", aimed at assessing the student's ability to successfully tackle the kind of problems that have motivated him to enrol in this particular programme. The criteria for this evaluation have to refer less to acquired knowledge than the ability to track and apply relevant knowledge and make efficient use of the available resources.
- b) Evaluation in a recurrent education system must be divested of its competitive and overly-individual character. It has been suggested that individual evaluation be replaced by group evaluation, based on the performance of the group as a whole in achieving a given task or solving a given problem. The advocates of group evaluation argue

1) S.M. Miller, Breaking the Credentials Barrier, Ford Foundation brochure, 1969.



that it is necessary to the furthering of co-operation rather than competition and individualism.

- c) Nothing can be achieved in this matter without consultation with representatives of the occupational sectors. Their tendency to reinforce the monopoly of the educational institution over the awarding of credentials and to steadily raise the educational requirements for entering professions has often been considered as one of the main causes of the excessive importance attached to degrees(1). One of the most difficult tasks of a recurrent education policy will be to persuade them to change licensing rules and practices and to accept entrants without "excessive regard to the amount of formal education applicants have had - and perhaps with the understanding that they will have additional opportunities to pursue formal education later in life"(2).

#### THE AVAILABILITY OF RECURRENT EDUCATION

Concerning the question of location and availability of recurrent education, a concentration of educational facilities in large centres such as most contemporary post-secondary institutions would certainly restrict the possibilities of participating for much of its potential clientele. The idea of the student who goes to the institute of learning will need to be supplemented by the idea of the institute that goes to the student; this will in particular mean a change in the part of a recurrent education system that today corresponds to post-secondary education. Much experience already exists in this field in terms of study circles, universities-of-the-air, universities without walls, correspondence courses, university extensions, etc.

Part-time study will probably be an essential part of a system of recurrent education. It will require educational facilities close to the place of residence, and reinforce the need for a well-distributed and decentralised system. No doubt much of the future

- 1) See for this, among others, Report on Higher Education, by Frank Newman, et al., Government Printing Office, Washington, D.C., 1971.
- 2) The quoted statement from the Newman report refers to employers' hiring practices, but also applies to the professional associations.

expansion of educational facilities should therefore utilise the kind of possibilities outlined above, in order to effectively cater for the variety of needs and specific conditions of the future clientele of recurrent education.

The systematic utilisation of locally available resources (both physical and human) offers hitherto unexplored or insufficiently exploited possibilities. It must, however, be expected that this will meet strong resistance caused by fears of a decline in quality, fears often rooted in such factors as the prestige of post-secondary institutions and vested interests of teachers.

Hence the usefulness of a study of already existing realisations of this kind. At first sight, the North American scene offers interesting and convincing examples of how resources in a neighbourhood can be mobilised (whatever the incentives for institutions and teachers joining such ventures) in order to provide a maximum variety of courses with maximum accessibility.

Of the suggestions that have been made in this context, the idea of local centres with a multi-purpose role, in proximity to the students(1), and having a dominant field of activity, seems promising. They can be attached to local compulsory and secondary schools, and can also rely on regional centres for assistance.

In Yugoslavia, suggestions have been made for the local pooling of all existing types of schools at the secondary and tertiary level into "school centres", which would require a certain amount of integration(2). It has been suggested that "some of these new educational institutions could develop within the framework of an association of enterprises from individual sectors, branches and groups of labour. This would be a means of achieving true integration of education with other sectors of the economy." It is obvious that in these institutions young people and adults would receive instruction together.

Also related to distribution is the use of new media. Technology promises to enable recurrent education to become "time-free" and "space-free", and thus to fulfil one of its essential requirements: to establish appropriate channels of communication between.

1) See in particular B. Schwartz, "Continuing Education for Adults", in Permanent Education, Council of Europe, op.cit.

2) Recurrent Education in Yugoslavia, in series "Recurrent Education", Policy and Development in OECD Countries, CERI/OECD, 1972.

students and centres of competence(1). But there is still a long way to go before this promise becomes reality. It has become a truism that in the educational field technology has not kept pace with the development in other fields, and it is debatable whether technology will be able to do so in the foreseeable future(2).

Of the problems and risks involved in making mass technology the key vehicle for the transmission of recurrent education programmes, two must be mentioned:

- a) The ability to use these media as instruments for self-learning or independent study seems to be inversely related to the educational and social level of the student. This implies that their use becomes more problematic the wider the circle of participants in terms of educational and social background. Hence the risk that indiscriminate use of new technologies will counteract the objective of greater educational equality.
- b) Programmes that are primarily transmitted through new media have to compete with the established traditional institutions. There is a great risk that they will become second-rate in terms of the prestige their certificates confer.

There is a close interaction between the media used and the objectives being effectively pursued: the choice of the medium inevitably implies that a certain type of candidate is most easily attracted and reached, and that a certain learning target is attained. New media tend to create their own objectives, or to change the priorities among the existing ones. On the other hand, the choice of new media is at present strongly conditioned by what is available on the market and by the resources that can be tapped. The promise of a marketable video-tape system is a case in point, because of its obvious potential to make education "time-free" (after educational television has already made it "space-free").

In the United States, attention has been drawn to the possibility that "SF/TF (Space-Free/Time-Free) programmes will be used by present institutions as a way of keeping out the

- 1) See in particular Time, Space and Education, Notes on the Future of Education, Educational Policy Research Center at Syracuse, Vol. III, Issue 1, Winter 1972.
- 2) In this context, the experience obtained in the United Kingdom with the "Open University" is very instructive.

disadvantaged"(1). Another fear is that they will reduce the pressure on colleges and universities to serve the disadvantaged, and a third that they will "line up in prestige beneath both community colleges and four-year institutions as a sap to the blacks and the poor". And finally, it is possible that they "will increase the options and resources available to the advantaged without a commensurate increase for the disadvantaged". One can certainly agree with the authors that "a hard analysis (of the possible impacts of SF/TF programmes on the distribution of educational benefits) should precede and accompany any outburst of enthusiasm".

It has also become clear that in order to be an effective learning instrument, the use of new media must be part of a "concerted action" in which a variety of media and approaches are combined. What applies to ongoing ventures that use, for example, television as their principal teaching vehicles applies a fortiori to future recurrent education programmes with less motivated, less educated, and less resourceful students.

#### CURRICULA AND TEACHERS

The general curricular design: the length of the educational periods, their full- or part-time character and the frequency of alternation with other activities are determined to a great extent by the type of courses. The introduction of a system of "capitalisable units" would considerably reduce the constraints deriving from the present rigid programme structure, but the requirements of each particular type of course will continue to count heavily in the organisation of recurrent education.

A basic organising principle will be that of institutional flexibility. This implies that rigid structures have to be "destructured", and that institutional arrangements have to be "disinstitutionalised" to a certain degree. It implies, furthermore, a high degree of integration of educational provisions with work, living, and leisure environments. Here again, many adult education programmes can show the way.

Another basic principle of the organisation of the curricula for recurrent education is that of "vertical" and "horizontal" integration:

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1) Time, Space and Education, op. cit., p.13.

- a) Vertically, the strict hierarchical sequence of water-tight teaching and learning blocks that have to be successfully mastered will need to give way to a flexible system of courses allowing an infinite variety of combinations, whose coherence is based on their relevance to the problems the student is tackling or in which he is interested. This may mean that "basic" and more "advanced" topics will be included in the same programme.
- b) Horizontally, the world of learning is still to a great extent divided into general and vocational education. In fact, at the secondary level, this division coincides largely with that between prestigious and less prestigious programmes. This is one of the major obstacles to equality of educational opportunity and to a better development of full individual potential(1).

In a recurrent education system it would be fatal if the division were maintained. It would mean that one would have failed to introduce programmes that are problem-oriented and therefore interdisciplinary and that are academically-oriented as well as practically-oriented. The interest in interdisciplinary teaching, in particular in the sectors of health and the environment, may lead to proposals organising problem-oriented recurrent education courses.

As to the teachers, a very complex problem arises. On the one hand, it is argued that in recurrent education the monopoly of the certified professional teacher should make way for a more open teacher recruitment policy, implying both the use of professionals in all fields and with all kinds of competence and experience, and that teaching would not necessarily be a full-time or a permanent profession. On the other hand, the role of the teacher would have to become much more complex and demanding than it is at present if the teacher is also to be a counsellor on social problems and social security, an expert on educational technologies, a careers adviser, etc. It is difficult to see how this could happen without a further "professionalisation" of teaching. Lively discussions on the teachers' role and their own

1) At the post-secondary level, the distinction is much less clear. It might be more apt to call most post-secondary curricula, preparing as they do for a professional certificate or diploma, "vocational" education, their difference with secondary vocational training being one of level only.

"recurrent education" (in-service training) are going on in several Member countries, in particular in the United Kingdom in the aftermath of the James Report(1).

Recurrent education presents a strong challenge to find new and imaginative solutions for staffing of the future educational system. In this search, consultation with the teaching profession is no doubt a key element(2).

In this context, two other important issues need to be briefly mentioned: teaching methodology and the relation between teachers and students. First, the adaptation of methodologies to the interests, motivations, and specific social work, and family situations of adult students must be given high priority in planning for a recurrent education system. Second, the implementation of the principle of student participation in the design of courses, the choice of methodologies, etc. will necessitate a new type of teacher-student relationship.

#### RECURRENT EDUCATION AND "OVERBRIDGING" EDUCATION

It was said in Part One of this Report that inter-generational inequality will be a serious problem for educational policy during the 1970s. It may be anticipated that in many Member countries no initiative concerning recurrent education will be politically tenable if it does not also include measures in favour of poorly-educated adults. It would be difficult to accept that recurrent education benefits, as does the present system, primarily the younger generation.

As recurrent education should encompass all post-compulsory education provisions, it will have to respond to the needs of two major groups of students with different educational backgrounds. One group will consist of those with a rather long period of earlier education, i.e. a completed secondary or post-secondary education, while the other group will include those with a short period of earlier basic education, i.e. adults who, when they left school, had not yet reached the "take-off level" at which they can benefit from recurrent education.

- 1) Teacher Education and Training, Report by the James Committee, HMSO, 1972.
- 2) See The changing role of the teacher and its implications (forthcoming OECD publication).

Two major problems emerge from this. First, that of the distribution of resources between the two groups. A major endeavour to give overbridging education up to the "take-off level" to poorly-educated adults will restrict the resources available for the more educated young and adults. Whether such a major endeavour in favour of the first group will be undertaken depends on the importance attached to the question of inequalities between the generations, and also on the importance attached to the formal system's rôle in retraining the labour force.

The second major problem connected with overbridging education is how to motivate the really poorly-educated to return to education. Experience has shown that it does not suffice to offer educational facilities. Even when these adults feel the need for education, and it is offered free of charge, they still have to overcome strong socio-psychological barriers. If a concerted effort is not undertaken to help people overcome these obstacles, there is a great risk that overbridging education will not reach those who need it most.

It is therefore important to complement the educational offer with active "outreach" activities, consisting of a concerted endeavour to attract these adults. Interesting results have been obtained in this field by educational organisers who work at the same place and on the same job as the adults whom they attempt to attract to further study(1).

The educational content is, of course, also of great importance. Particularly in the initial courses, overbridging education must correspond to the participants' specific field of interest and experience, i.e. be closely related to their own work situation. In this respect, promising experiments are being carried out in Norway(2).

In conclusion, it must be stressed that overbridging education and recurrent education as a long-term strategy are highly complementary. The former aims at diminishing the inequalities between the generations; the latter will, hopefully, promote greater intra-generational equality. Which of the two types of inequality is considered the more serious may differ according to specific national settings, but it is obvious that in the

1) FÖVUX (1970), Kommitten för försöksverksamhet med vuxenutbildning: Proposition 1970:35, Stockholm, Utbildningsdepartementet. The work of this Committee contains interesting suggestions on this matter.

2) See Åke Dalin, Recurrent Education in Norway, op. cit.

perspective of recurrent education, they have to be tackled simultaneously, and that in view of limited resources, a choice must be made as to which of them should be given the highest priority in the near future.



## Chapter 2

### INTEGRATION OF EDUCATIONAL AND NON-EDUCATIONAL POLICIES

#### INTRODUCTION

The close interdependency between educational and other policies has come to the fore in the last few years. In attempting to achieve equality of opportunity in the school system, attention has been drawn to the need to combine the strictly educational with supporting social and economic action in the home and neighbourhood, in income, taxation, and housing policies. The relatively modest role of education in attaining social equality has made obvious the fact that educational policy is only one element - and not the most important one - in achieving the wider social objectives that education pursues.

The experience obtained in compensatory education for disadvantaged groups must be kept in mind when planning for recurrent education: the need for a close integration between educational and non-educational supporting policies is particularly strong if there is a gap between the motivations, culture, and aspirations of school and those of home, neighbourhood, and peer group. The adult who will enrol in recurrent education is, however, in closer interaction with his social environment than are young people: His internal motivation is, as a rule, stronger, but so are the external constraints working against his involvement in education. The need for a co-ordination between educational and non-educational policies derives furthermore from the close interaction with society that a system of alternation between education and other activities implies.

This need for co-ordination and integration between policies becomes particularly evident in the attempt to achieve equality of educational opportunity and social equality: recurrent education's potential to achieve this is determined by the accompanying and

supporting changes made outside the educational system. The need for these changes and arrangements is inversely proportionate to the educational and social level of the candidates. The lower their income level and professional status, the less is their motivation to enrol in recurrent education and the fewer their possibilities to make the necessary arrangements for work, job, financing of study, choosing the most appropriate type of programme, and planning their career, while their chances of rejoining the labour market on the same or a higher professional level are also diminished.

Without the necessary support and adaptation of, among other things, labour market policy, and unemployment and promotion conditions, recurrent education risks increasing inequality and strengthening social selection.

In a short-term perspective, the co-ordination with non-educational policies will have to concentrate on a few key areas, and in particular on those changes in other areas that are prerequisites for the introduction of a recurrent education system. In the following sections the changes needed in these areas are discussed in more detail.

#### FINANCING OF RECURRENT EDUCATION

Financing of recurrent education is related to two types of costs. First, expenditure for educational provisions as such: teachers, buildings, facilities, etc. Secondly, a system of recurrent education entails important and far-reaching costs for the support of the individual and his family during his participation in the courses. It is likely that the financing of the second type of costs and notably compensation for foregone earnings will be one of the key problems in planning for a system of recurrent education. This raises the question of the level of financial support for the individual and the priority for recurrent education as compared with the expansion of other educational sectors.

As to the sources and methods of financing, the first question that arises is whether recurrent education will be financed out of the public budget, as in most youth education. This is primarily a matter of principle, comparable with the question of the financing of post-secondary education as it is at present widely discussed in many OECD Member countries.

As to the cost aspect, the first question that is likely to be raised is whether the cost of recurrent education would be lower than for conventional education. In seeking an answer to

this question, it has first to be considered that, as a result of a further increase in participation rates and, in many cases, of demographic growth, the cost of the latter will no doubt continue to increase in all OECD Member countries. The chances that in the existing system the direct expenditure per student could be reduced are very slim; on the contrary, due to increased staff costs, they can be expected to rise considerably. Non-traditional types of post-secondary programmes have a better record, but the available information does not yet allow fair comparisons to be made. Furthermore, data on these programmes do not apply to a fully-fledged system of recurrent education.

The basic question when it comes to taking a decision will be that of the returns of recurrent education. A cost-benefit analysis based on classical economic considerations is bound to turn out to the disfavour of recurrent education(1). For a correct cost-benefit analysis to be made, social goals such as equality, participation, and benefit to the individual in terms of improved opportunities for his development must also be taken into account. These considerations may outweigh the higher costs in purely economic terms. Secondly, future decisions in this matter are likely to be affected by factors such as the growing awareness of the need to reconsider the concept of economic growth, the concern about the "dis-economies" that its indiscriminate pursuit produces, and, generally, the search for a new equilibrium between social goals.

The costs for the individual are in this context as important an issue as the financing of the system itself. The main question here is whether - and if so, to what extent - the recipient of recurrent education should contribute to its cost. It is obvious that people with low income and/or a poor youth education will only be able and motivated to participate in recurrent education if such financing and insurance schemes are provided that give them economic security during periods of study.

Countries may take different views concerning the recourse to public or private means for financing the cost of the individual's participation in a system of recurrent education. But the margin for variations on the financing theme is limited because of the close interaction between the level and type of financing on the one hand and the potential of recurrent education to attain the

1) It must be added that the results of a cost-benefit analysis of this kind must be considered with great circumspection in view of the many incalculable factors involved.

basic educational and social objectives that it pursues on the other. It is, for example, apparent that in the case of "over-bridging" education, the amount and type of financial help needs to be related to the age, amount of former education, family responsibilities, and income of the recipient. In an earlier CERI publication, it is said that "if we accept the principle that everyone has a right to, say, 16 years of full-time education - 10 or 12 of them to be taken between the ages of six and 16-18 and the rest later - and that this amount of education should be subsidised fully or partly, it is clear that those who have exhausted the ration of 16 years and who want to continue their education would have to pay their own way"(1). Such a proposal implies that, in a short-term perspective, a financing policy for recurrent education should give priority to the large group of under-educated adults, in particular in those countries that have witnessed a wide expansion of youth education.

#### EDUCATIONAL-LEAVE OF ABSENCE

If recurrent education is to become accessible to larger groups of people who are part of the active population, a significant effort will have to be provided to increase the possibilities for taking leave of absence. It will be necessary to introduce legislation as to the right to take up such leave or to make it part of the professional agreement between employers and employees. In those cases in which studies require the interruption of work, reasonable assurances must be given as to employment after the completion of studies. Decisions as to the need to take up full-time or part-time studies will have to depend to a great extent on the nature of the courses that the worker intends to follow, but also on his motivation and specific educational interests.

As to practical ways and means much can probably be learned from experiences obtained in many Member countries with similar legislation applying to cases of pregnancy, military service.

1) From Equal Educational Opportunity 1: A statement of the problem with special reference to recurrent education. OEdD, 1970, p. 46.

attending trade union courses, retraining in the civil service and even far more generally oriented education(1).

Closely related to this is the need for changes in social insurance systems, which today are often based on income from employment. If the individual gives up his income in order to take part in an educational programme, his social rights and benefits are affected accordingly. It is therefore of prime importance in a system of recurrent education that social insurance protection be extended to periods of study. However, those who are not employed should also be given social insurance protection as well as financial support during their period of study.

The amount and frequency of educational leave, as well as the way in which it will be introduced - through legislation or through negotiation between employers and employees - will certainly vary between Member countries. But it should be stressed that, in view both of the goal of equality and the individual's specific educational interest, the right to educational leave should not be limited to education that is profitable from the firm's and the economy's point of view.

Secondly, the length and frequency of educational leave and the guarantees for re-employment should be adapted to the specific interests and constraints of the users' group. It may be that, for example, more strict guarantees for re-employment have to be given in the lower skilled than in the higher-skilled professions, and that the less-educated need more frequent and longer periods of study and preferably full-time studies, whereas the more educated can do with less frequent periods and mainly with part-time studies: in short, that policies for leave of absence should be based on the compensation principle. The arrangements for educational leave of absence as they exist at present seem on the whole to be based on the diametrically opposed hypothesis, i.e. that the most educated professional groups are most in need of favourable conditions for further study(2).

- 1) The French law of 16th July, 1971, on professional training in the framework of permanent education provides an interesting example of the type of arrangements necessary in order to secure the interests of both employees and employers in granting educational leave of absence.
- 2) A critical analysis of the implications of different types of arrangements for educational leave of absence can be found in Recurrent Education in the Federal Republic of Germany, by Hedwig Rudolph et al., op. cit.

## RECURRENT EDUCATION AND THE LABOUR MARKET

It is clear that a system of recurrent education would have a great impact on the labour market and in particular on the occupational promotion of employees. Concerning the individuals, it would facilitate promotional career patterns, i.e. the possibility of gradually climbing the career ladder in a given professional field, instead of being confined within a particular echelon. At the same time, it could facilitate inter-occupational mobility by giving people opportunities to train for a profession other than the one that they had originally chosen.

Recurrent education would also offer the possibility of shifting from those jobs that impose unusually severe work conditions, put heavy constraints on family life, require an unusual physical fitness that rapidly declines with age, or are potentially dangerous to health(1). It should provide full opportunities for retraining and a change of occupation when health, family, or other conditions require this, and before harmful effects have ensued.

An important "pay-off" of a recurrent education policy would be to improve the competence for participation in decision-making at the enterprise level and at the broader professional, regional, and national levels. The creation of conditions for workers to influence recurrent education programmes is a prerequisite for the success of a recurrent education policy. At the same time, in co-operation with management the labour unions will have an important role to play in facilitating the introduction of a system of recurrent education and in adapting the labour market, job relations, and career patterns in the above described sense.

It may be necessary to create jobs where new skills and abilities can be put to use. The control of modern central administrations over a high proportion of investments would give them the possibility of adapting to some extent demand to supply, i.e. to encourage the creation of employment in those sectors where, thanks to recurrent education, the supply of qualified candidates is greatest. Increasing economic welfare and a gradual shift in socio-economic priorities may make such a policy more acceptable and feasible than it might seem at a first glance.

1) It is understood that, parallel to this, an effort needs to be undertaken to improve the conditions under which such strenuous and/or unhealthy work is being carried out.

## CONCLUSION

It is apparent from what has briefly been said in the foregoing that these three key areas, i.e. financing of recurrent education, educational leave of absence, an interaction with the labour market, are of crucial importance in a policy for recurrent education. They demonstrate the need for co-ordination of educational and non-educational policies in planning for recurrent education. Without co-ordination, there is a great risk that the introduction of a system of recurrent education will increase social inequality and contribute to create a society in which the essential needs for individual development and fulfilment are left unsatisfied.

## Chapter 3

### PLANNING AND RESEARCH IN RELATION TO RECURRENT EDUCATION

#### INTRODUCTION

A few comments on the trends in educational planning and research are needed prior to the elaboration of their role in recurrent education.

The theory of educational planning has undergone a marked change since the early 1960s. In its beginning stages, planning was often partial, reactive, and frequently limited to quantification and theoretical considerations of social demand and manpower criteria<sup>(1)</sup>. It was also often called on to provide answers to short-term questions. A shift has gradually taken place towards a view of planning as closely linked to the policy-making process. The word "policy-planning" recognises this principle, i.e. that in modern societies policy-making is no longer possible without planning.

Educational planning has also, though very hesitantly, evolved towards decentralisation of decision-making and administration, towards making decisions as transparent as possible, and towards a larger participation in these functions so as to make them "grass-roots" processes, to the implementation of which all who participate in their formulation feel committed. The term "participatory planning" has been proposed to designate this purpose.

A third function attributed to modern planning is that of "informative criticism", whose role it is to continuously analyse current practices and policies and to search for new and better solutions. Informative criticism is proposed as a continuous

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1) See "Educational Planning and its Relationship to Policy", in Educational Policies for the 1970s.



service to educational decision-making and not as an instrument for exerting prescriptive authority(1).

A fourth development is that of the orientation of planning towards long-term goals and policy options, and towards alternative educational strategies for their implementation.

Implicit in this new thinking on the role of educational planning is that all those involved should have a say in the formulation of both broad and specific goals and in their implementation, so as to better shape education to the needs of consumers and of society, and to make it a process to which all feel committed. From a technocratic process carried out somewhere at the top of administration, it is called on to become a process that is a permanent part of educational action at all levels.

Although planning practice is still far from the above-described thinking, a general conclusion can be drawn at this point: the aims pursued by planning as they have been briefly mentioned call for the same profound changes in the educational system as are advocated in the recurrent education concept, and the new thinking about educational planning will greatly facilitate the transition from the present educational system to recurrent education.

The role of educational research is beginning to be conceived along similar lines: as an instrument at the service of education on all levels and wherever decisions must be taken. The envisaged active involvement calls for a type of research that could be called "action research". It provides the participants in the educational process with the necessary information to exert critical analysis and thus make real participation possible at the level of their particular involvement.

Thus conceived, planning and research are functions that pervade the educational process in all its stages. They enable students and teachers to play a critical role in the formulation of educational policies, and are indispensable instruments for participation in educational decision-making and administration at all levels. Their scope includes the study of normative issues. Their role in this context, however, is not to prescribe, but to elucidate alternative policy systems and to elaborate alternative solutions, between which a judicious choice can then be made.

1) See K. Etde, Educational Research Policy (Technical Report), CERI/OECD, September 1971.

The following section attempts to indicate a few of the major problem areas that will need to be dealt with in planning and research for recurrent education.

#### PLANNING PROBLEMS IN RELATION TO RECURRENT EDUCATION

Planning in relation to recurrent education involves two major categories of issues. One encompasses the planning process as such with the need for participation of all interest groups at the various levels of decision-making. The other category of problems is related to new domains or issues of planning that will emerge if recurrent education becomes a reality. As will be seen further on in this section, both planning categories are closely allied and are in fact only different aspects of the same process.

The first type of issue refers to the need for the participation of the different interest groups in planning for a system of recurrent education and therefore for a widely-spread and highly decentralised planning procedure.

This implies that a network for communication and participation needs to be created whereby all those concerned can be reached, so that they can effectively participate in the planning process and also as much as possible in management and decision-making.

The institutional arrangements for such an endeavour will differ according to each country's general political pattern as well as to the pattern of its educational administration. However, in each case planning should not be an issue for professionals, but a process in which the different "users" of the system have a real say. Perhaps the main challenge in this matter will be to involve the social partners at large in the planning process, and thus other categories of participation than have up to now felt concerned about the development of education.

It is essential that participants be given the means to continuously adapt system and programmes to their needs and aspirations. The participation of all social partners will therefore be needed not only in the planning stage, but also in the phase of implementation, to allow for an ongoing process of modification of strategies based on experience as well as newly arising insights and needs. In modern societies, few models exist for a broad platform to reach a consensus on comprehensive social and

educational policies. They exist - some of them on an ad hoc basis - in the area of wages, social policies regulating the security of employment, and conditions of retirement.

The great asset of adults in this context will be that their experience and their motivations will enable them to play a constructive and creative role in the planning and decision-making process. On the other hand, the development of such a platform for decisions on recurrent education presents a major difficulty as compared with the above-mentioned models: recurrent education policy is, by definition, consumer-oriented. Its potential consumers are the total population. As distinguished from the partners in the policies mentioned above, the new potential participants in the discussion and decisions on recurrent education are seldom organised. New frameworks for consultation and participation will therefore have to be set up, and Member countries will have to envisage the creation of consultation patterns adapted to their specific political and administrative structures.

The second problem related to planning of recurrent education is connected to those mentioned above. First, it will be necessary to involve the non-educational policies discussed in Chapter 2 in the planning of recurrent education. Secondly, the definition given of recurrent education in Part One implies that the adopted planning procedure must also deal with the education organised outside the formal educational system. Conventional educational planning, policy, and administrative mechanisms generally ignore the existence of informal education.

An additional complication arises from the growing role played by multinational firms in the diffusion and transfer of technology and knowledge across national borders. Their increasing power and high flexibility may necessitate the co-ordination at a multinational level between educational and socio-economic policies.

The magnitude of these problems and the way in which they should be approached will vary between Member countries. Solutions to be adopted depend to a great extent on political priorities, and therefore a detailed discussion would be out of place here. The purpose of this section is to draw attention to the fact that planning for recurrent education will require linkage and co-ordination between educational and non-educational planning. In doing this it must be kept in mind that not all recurrent education will be carried out within schools and institutions of higher education. Enterprises and other out-of-school places will

probably play a major role in providing recurrent education programmes. In this perspective, sector planning, based on the idea that society consists of different sectors that can be dealt with in isolation from one another and at a later stage coordinated, may be an inadequate planning strategy.

#### KEY RESEARCH AREAS RELATED TO RECURRENT EDUCATION

The scope of the research problems in recurrent education will be wider than that with which educational research has traditionally dealt. More importance than hitherto will no doubt have to be attached to interdisciplinary research approaches. A system of recurrent education will be in a much closer interaction with society at large than the present system. Research for the planning and introduction of such a system will necessarily have to bring together research findings from all social areas: educational, social, economic, and the labour market.

The way in which such interdisciplinary and inter-sector research will be carried out will differ between the Member countries because, in particular, of the diversified functions that they attribute to research in their educational planning and policy. The identification of the most relevant research areas will to some extent also depend on the short- and long-term objectives to which recurrent education policies will give priority. However, in all cases a number of general research areas will emerge, areas that up to now have been only marginally touched upon by educational research and planning.

In the following, a first attempt is made to state some of the major issues on which research and planning for recurrent education should bear. It is stressed, however, that in such a complex matter as this, research, planning, and development work cannot be neatly pigeon-holed and, furthermore, that research plays a rather limited role in preparing the stage for recurrent education, as the main decisions relate to political rather than to scientific options.

#### THE EDUCATIONAL DIMENSION

Concerning the educational aspects of recurrent education, three major problem areas need to be considered:

- a) The individual's learning process, seen in a lifelong perspective;
- b) the relationship between supply and demand of educational provisions for different age and social groups; and
- c) the nature and role of admission rules, degrees, and credentials.

As to the first issue, the distinction made in Part One of this report between learning and education must be borne in mind. One of the primary tasks of a system of recurrent education is to create the conditions for cross-fertilisation between learning in educational situations and learning occurring in other social situations.

There is little research evidence on learning in a lifelong perspective and on the conditions that favour this cross-fertilisation between learning and education. Present educational practice is based on a number of implicit assumptions that need to be challenged on their validity. It must be asked, for instance, whether the sequence in which educational programmes are offered and the age at which they are provided fit in with the findings of developmental psychology, and in particular with the evolution of abilities and motivation for learning. In this same context, the problem must be studied of how, in view of the individual's personality development and external conditions of living, an effective interplay between organised education and unorganised learning experience can best be guaranteed.

On these issues, a systematic research effort will be required. Ongoing or already completed longitudinal studies on educational achievement may contain data that will facilitate the clarification of some of the main problems in this area, and a research programme for recurrent education could therefore usefully start with an analysis of the relevant data collected in these projects.

But in designing curricula for lifelong learning (it being understood that they relate directly to the recurrent education periods and programmes and take indirectly into account the learning experience acquired in other social situations), considerations other than individual development patterns alone will have to be taken into account, notably those relating to the use of acquired knowledge, aptitudes, and attitudes in the different social roles that people are called upon to fulfil throughout their lives. Here once again the work role does not hold a

monopoly: roles in family, peer group and neighbourhood, and broader social and cultural environment also evolve with age and this evolution has implications for recurrent education curricula in the perspective of the individual's life cycle.

The second issue mentioned above, i.e. supply of and demand for educational provisions, is a very complex research area, but its exploration is of crucial importance in planning for a system of recurrent education. A key question here is under what conditions demand originates. In the social service sector, it has often been asked why the poor were not availing themselves of the social services offered while the middle classes exploited all existing possibilities. This has usually been explained either by lack of information or the alienation of the poor from the social services. However, it appears that the real answer lies in the fact that the demand was directly linked to the nature of the supply. Wherever the supply of services was of direct relevance to the poor, there was no longer any under-utilisation. These arguments must also apply to the interaction between demand and supply in the educational sector and should be taken into account in the planning and implementation of recurrent education.

In a research programme on the supply and demand issue an analysis could usefully be made of the experience accumulated over the years with so-called "non-traditional" patterns of study, i.e. programmes within the educational sector that are in one way or another especially geared to young or adults who do not comply with the conventional rules and setting of the establishment(1).

A second type of supply that is relevant to this question is that offered in the job-related education and training sector. Many big enterprises, professional associations, and government services have long-standing experience with educational programmes. Some of these provide an education comparable with, and sometimes equivalent to, what is provided in the conventional education system.

In terms of approach and use of educational technologies and in terms of compatibility with adults' specific professional and social situations, programmes of both types may provide highly relevant information on the question of how demand and supply interact.

1) See for an example of a first attempt at analysing the set-up and impact of such programmes: Recurrent Education in the State of New York, by Peter F. Regan, Norman Solkoff, Walter Stafford, op. cit.

As to the third issue, that of admission rules, degrees, and credentials, it seems likely that the nature of present admission rules and the gate-keeping function fulfilled in present-day society by degrees and certificates will be a major stumbling block in the way of recurrent education. Among the conditions for implementing recurrent education will be to depart from the practice of having a virtually uniform academic frame of reference as a basis for admission and to develop admissions criteria that refer to various types of experience obtained in work and other social situations. Few experiments are at present being carried out in this field, and no doubt this is an area in which a great deal of future research on recurrent education will be required. As to degrees and certificates, the crucial question is how to break or change the "credentials barrier". If the rigidity of the system of degrees and certificates cannot be attenuated and the stress on repetitions learning that is connected to this system reduced, this will constitute a major obstacle to the introduction of recurrent education. One of the problems that need to be attacked in this context is the control over degrees and certificates exercised by the professions as compared with that exercised by the educational system. But the more important challenge will be to adapt degrees and credentials to the new requirements deriving from man's role in future society.

A satisfactory admissions and certification policy can no doubt only be worked out on the basis of a consensus between all partners involved, i.e. the students themselves, the representatives of the teaching profession and of educational administration, and the representatives of employees and employers. Each of these groups has its own interests in this matter, and each will have its own role to play in planning and implementing such a policy. The definition of these roles may have to wait until the interests of the several groups have become better defined. But in the stage of preparing for recurrent education, this complex of issues will no doubt be one of the most difficult to solve. Research can certainly play a part in this, but will have to give way at an early stage to political consultation and negotiation.

#### THE SOCIO-ECONOMIC DIMENSION

The socio-economic implications of a system of recurrent education are far more complex than those of youth education. With



respect to the latter, it was to some extent possible to compare two quite neatly separated stages: the stage of learning and investment in learning, and the stage of application and of investment returns. Of course, the fact that education and learning are not identical was a complicating factor, and the difficulties in calculating the part of education in explaining variance in income and the role of education in economic growth well known.

In a system in which education is intermingled with professional work, in which the educational institutions are much more closely integrated with the social and economic institutions, and in which the human and capital resources for education are provided from a great variety of sources, it will be much more difficult to determine the interaction between the various factors involved in the process, and in particular to calculate the relation between "input" and "output". The latter is, however, only one, and not the most important, issue that needs to be considered in this context. It seems more relevant, in fact, to concentrate on research and development work in the following three broader fields: resources and financing, interaction of recurrent education with the labour market, and recurrent education's implications at the enterprise level.

As to resources in general, it may well be that a recurrent education system will require more of a country's human and physical capital resources than the present system. Obviously, it will be necessary to have, at an early stage of planning, an idea of the size of these resources. The rate of return that several types of investments are likely to yield will also have to be estimated.

There is, however, another important question to which research and planning for recurrent education must address itself: adopting a system of recurrent education implies a change in society's priorities concerning the use of resources, in line with a change in socio-political objectives. The criteria for assessing the "rate of return" of recurrent education investment need to be related to these objectives, and hence economic returns will have to be weighed against other benefits. In the past few years, economists and social scientists have begun to explore how these non-economic goods can be defined and measured. Planning and research for recurrent education will have to refer to the results of these studies.

The results of such investment-return studies are, however, likely to be rather inconclusive, even if a consensus can be reached as to the objectives and if these can be clearly defined. Ultimately, the decision as to a redistribution of resources in



favour of recurrent education will have to be largely political. In these terms, recurrent education policy does not essentially differ from educational policy in general.

Finally, it must be emphasized that the costs and benefits of recurrent education cannot be compared with the costs and benefits of the conventional educational system alone. Recurrent education is a proposition encompassing the overall educational effort, formal as well as informal, public as well as private. The relevant question is, therefore, first how the total systems cost and benefits of recurrent education compare with the total cost and benefits of the present provisions for education and training, wherever they are located and by whom ever they are financed and administered. Relevant data on the informal sector are notoriously difficult to obtain and therefore priority may have to be given to improving the data-basis concerning investment and returns in the adult education sector.

The origin of the resources for a recurrent education system needs to be in line with its aims. Because of its democratisation and participation objective, it might appear that the resources should preferably come from those who participate in recurrent education and from those who profit from it. This, however, immediately raises the question of who will most profit in the end from such a system. The issue includes complex analytical as well as political questions that will need to be frankly faced in further work on recurrent education(1). It would certainly be premature at this stage to make any statement about the precise role that private and public financing should play in financing recurrent education.

Concerning the financing of the individual costs and the returns which the individual can expect from participating in recurrent education, two specific questions arise:

- a) The problem of individual returns is at the centre of the discussion, contrary to youth education, where the expected life earnings of students are rarely used as an argument. In the recurrent education discussion, these expected life earnings would, according to many, justify a system of unequal contributions by students to the cost of their education.

1) See for a discussion on this Recurrent Education in the Federal Republic of Germany, by Hedwig Rudolph, et al., op. cit.

b) Whereas the question as to foregone earnings is rarely mentioned in connection with youth education, it occupies a central place in discussion about the financing of recurrent education. From the point of view of the individual, this may be justified, but from an economic point of view there are strong arguments in favour of including foregone earnings in calculating the total social cost of youth education as well.

The priority given to the equality objective leads to two important conclusions concerning the financing of recurrent education:

- a) Insofar as the system will be financed from other than public funds, this must be based on the solidarity principle. Suggestions for using a system of an "educational insurance" or another system of obligatory insurance are based on this principle. It is, however, argued that care has to be taken that such a system of insurance does not exclude those who are not actively employed and those who may be most in need of recurrent education. Hence public financing and financing from such sources as insurance systems should be complementary.
- b) A system for financing recurrent education on a decentralised (local or regional) basis would probably lead to the maintenance or the increase of social inequalities. The responsibilities for organising and administering the system should, for the sake of its efficiency and its relevance to the consumers' needs, be decentralised and entrusted to local and regional bodies.

Research will need to be undertaken into the effects of alternative systems of financing, and into the merits of each proposed system with regard to the objectives of recurrent education. Some of the systems used for financing adult education (for example the use of unemployment funds in the Federal Republic of Germany) deserve particular study.

The exploration of alternative systems for financing recurrent education has to go hand in hand with the search for new ways of financing the system of youth education. It is fortunate that this search has been started in recent years, and that public opinion as well as educational policy-makers are aware of the fact that it is at least worth considering whether public financing should not

be complemented by other sources. However, it seems imperative that, parallel to the integration of present post-compulsory education with recurrent education, one and the same system of financing for the overall post-compulsory educational system, youth as well as recurrent, be conceived. Without such an integrated system of financing, the essential objective of inter-generational equality may not be attained.

A better supply of manpower is one of the arguments pleading in favour of recurrent education. A more rapid adaptation of education to the needs of the labour market for qualified personnel and increased occupational mobility would indeed be highly appreciated. The expectations from recurrent education in this respect are based on the belief that it will be a better instrument for performing this function than the present educational system and its complement in industrial training, but there is still a long way to go before this belief becomes a well-documented body of research and experience. Evidence from existing adult education schemes may help to clarify some of the issues involved. More support will, however, have to come from large-scale experience and perhaps experimentation.

One of the most important economic benefits that can reasonably be expected from a recurrent education policy is an increase in substitution possibilities of all kinds, on which the labour market is strongly dependent. This may well offset higher investment costs. Further information on this matter is of primary importance in studying the interaction between recurrent education and the labour market. Here again, various types of existing education and training schemes in industries and services will need to be analysed regarding their impact on substitution between occupational categories.

The overall question of the labour market, however, must also be looked at from another angle: one of the objectives of recurrent education is precisely to promote a new type of interaction between education and society, and between the several stages of the individual's life cycle. The claim of recurrent education to enable the individual to freely decide on his way of life is an empty slogan if the adaptation process of education - labour market is not made a two-way interacting process.

The efficiency of industrial enterprises and of services is, to a great extent, determined not only by the quality of the initial as well as further training of their personnel, but also by

their experience in particular types of work. Education and training on the one hand, and experience on the other, provide the individual with a complex cluster of qualities and competences.

The effect of recurrent education on the functioning of enterprises and services is not easy to foresee. Small enterprises may face great difficulties in adapting to a situation where a certain percentage of their personnel is permanently engaged in full-time or even part-time recurrent education. But apart from size, other factors will play an important role: in those enterprises where, as a result of the type or organisation of work or perhaps mainly as a result of tradition and inability to change, efficiency depends heavily on accumulated experience, the permanent rotation process resulting from recurrent education will cause great difficulties. It is to be seen how many of these difficulties are due to lack of innovation capacity, in which case the introduction of recurrent education could initiate a process of renewal, and how many are inherent in the type and organisation of work, in which case recurrent education risks being considered a disturbing and detrimental element in the enterprise, unless its introduction is accompanied by a policy of overall organisational change.

The problems that the individual who gives up his job for a period of recurrent education will encounter are first of all professional. Logically, one could expect that these difficulties become greater the more qualified the candidate is, both because he will be more difficult to replace and his employer will therefore be more reluctant to give him leave of absence, and secondly because the number of jobs decreases the higher the professional level. However, occupational mobility tends to increase parallel to the level of occupation, and the potential gain from recurrent education is higher at the more qualified than at the less qualified levels of occupation. It is also a well-known fact that the bargaining power to obtain educational leave of absence increases with the level of professional qualification.

Difficulties of another order may, however, arise in the socio-psychological field, notably in the sphere of family relations, feelings of security, and feelings of "belonging" to a social group. Some experience as to the nature of these subtle problems and their solution has been acquired in adult education. Research into these difficulties will need to be carried out.

The introduction of recurrent education needs to be accompanied by a carefully balanced policy in the fields of employment,

conditions of work, and social security(1). Such a policy needs to be based on relevant research into the consequences and implications for the individual and for enterprises and services. It must also be the result of the largest possible consensus among the social partners. In this context, one should also further explore ongoing trends towards greater influence by the employees over their own work situation, and its interaction with the employees' interest in learning. Ongoing experiments in this field(2) seem to confirm the thesis that the motivation for learning depends to a great extent on how relevant it is to the individual's work situation and on the extent to which the employees themselves can decide on the arrangements and content of the courses.

In the course of the work already undertaken on this matter both at the national level and by CERI, it has become clear that in the preparatory stage priority must be given to the socio-economic and financial implications of recurrent education and to the new institutional arrangements that the introduction of the system requires. Secondly, exploratory research needs to be undertaken into the main educational implications prior to developmental work concerning programmes, their location and content, staffing, etc.

In conclusion, it must be stressed that the conversion of the present educational system into a system of recurrent education is a vast and ambitious undertaking, much greater than anything that has as yet been undertaken in educational planning, policy, and reform. It implies a full rethinking of all aspects of the educational process: structure, curricula, methods of teaching, criteria and instruments for evaluation, human and capital resources and their utilisation.

The preparation of the ground will have to be carried out with somewhat inadequate instruments for educational and socio-economic research and planning that are available. But in any event, it cannot be expected that scientific arguments will provide a more solid basis for political decision-making regarding recurrent education than they have provided when decisions on youth education had to be taken in the recent past.

- 1) A number of developments relevant to this are being discussed and analysed under the term "flexibility in working life". See the papers for the Conference on "New patterns for working time", held at the OECD from 26th-29th September, 1972, organised by the Manpower and Social Affairs Directorate.
- 2) See: Social Science Information 9 (5). A strategy for research and social change in industry: Report on the Industrial Democracy Projects in Norway.

### CONCLUSION

The aim of this report is to clarify the recurrent education issue and to spell out the implications that it will have for educational and socio-economic policy-making. It does not aim to propose a master plan or a set of master plans that could be applied in the OECD Member countries.

The main message that it conveys is that acceptance of the recurrent education proposal implies not only a major turning point in educational policies but that it also has important consequences for social and economic policies. Hence the need for a co-ordinated approach and for the establishment of appropriate planning and policy-making mechanisms for dealing with the issue in its full scope.

The second major point that the report attempts to convey is that such a major re-orientation of educational policies and related social and economic policies can only be achieved in a long-term planning and policy perspective, but that the long-term planning strategy it requires has clear implications for short- and medium-term planning and policy. These implications primarily concern the educational system and the informal education sector. But they also relate to the labour market, to the use of mass media and to social security provisions and, generally, to the social, economic, and cultural sectors at large.

It cannot be over-stressed that such a major change as is here proposed needs careful preparation in terms of research and development work, but that scientific arguments alone will not be decisive. The essentials of the idea, and its main implications, will need to be put before the representatives of all the social groups whom it concerns and also before countries' planning and decision-making bodies.

On the basis of this twofold input - from research and from consultation with the social partners and policy-makers - preferences for alternative options will gradually emerge, and priorities for short- and medium-term research, planning, and action will eventually be set.

The implementation of a system of recurrent education will have to proceed in several successive stages. The timing of these stages and the order of priority in which they will be implemented is likely to vary according to each country's priorities. One of the key considerations in establishing these priorities will have to be the risk that recurrent education provisions, if they are not well-timed and well-planned, may increase instead of decrease inequalities and imbalances. A few generally applicable principles must be borne in mind:

- priority may have to be given to those adults who have not completed a secondary or even a primary education course and to whom a "second chance" may be given through recurrent education. If this principle is accepted, a great deal of the resources for recurrent education will have to be spent on basic education courses in the first decade or so. But the rate at which post-secondary courses will gradually take over will differ greatly between countries.
- More generally, with priority being given to the equality objective, the aged, uneducated, and unemployed will in all countries be given opportunities to attend recurrent education. It will, however, depend on each country's economic situation and political constellation as to what extent this priority will eclipse manpower and resources considerations.
- The availability issue will be one of the key concerns of the recurrent education policy of all countries. But the kind of recurrent education network to be set up and the priority to be given to the development of new ways of distributing education will greatly depend on geographic and demographic characteristics.
- Increasing the educational and occupational opportunities given to women will have to be one of the priorities in any recurrent education policy. However, the priority given to this objective will have to be weighed against other, notably socio-economic, objectives and constraints.
- The role that existing post-secondary institutions will be called upon to play in providing recurrent education will differ from country to country. Certainly as a long-term target the general principle of a unified and highly co-ordinated set of post-compulsory educational provisions will apply to all. But the ability of the



existing institutions to provide relevant programmes for adults differs greatly from case to case. In North America, for example, a long tradition of offering courses to adults exists, so a transition towards integration of youth and adult education at the post-compulsory level may be feasible. In most European countries this may meet more resistance, and may also be complicated by the fact that "second chance" education for poorly educated adults might have to be given priority.

Recurrent education has, not incorrectly, been called a "policy" metaphor"(1). It provides a way into an alternative educational future rather than a proposal for a specific educational policy. Evolution towards this future will require the definition and implementation of new policies - involving aspects broader than the purely educational - and these policies can be expected to develop and change on the way towards the long-term target.

Recurrent education's greatest asset is that it proposes a focal point for the multitude of isolated ideas about what education in the future could be and how it could become more relevant to people's real needs and aspirations, and that it sets a broad framework within which policies for attaining this long-term target can be developed. On the way to its realisation, the risk of a mis-orientation towards objectives other than those it set out to pursue is very great. It is hoped that this report will make a contribution towards defining the long-term target and towards guiding the policies that will be developed for attaining it.

1) See Warren L. Ziegler, Recurrent Education: A Model for the Future of Adult Education and Learning in the United States, prepared for the Planning Group for the National Foundation for Post-Secondary Education under USOE Contract No. 1-7-070996-4253.



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