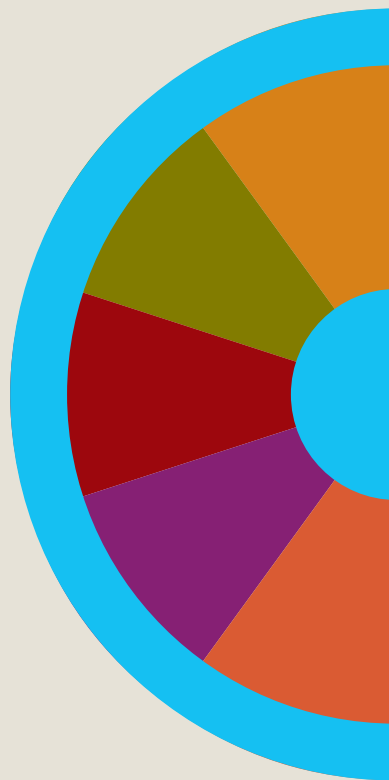


# CONFINTEA MID-TERM REVIEW 2017

SUWON / OSAN, REPUBLIC OF KOREA  
OCTOBER 2017

## TOWARDS CONFINTEA VII: ADULT LEARNING AND EDUCATION AND THE 2030 AGENDA



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**PUBLISHED IN 2019 BY**

UNESCO Institute for Lifelong Learning  
Feldbrunnenstrasse 58  
20148 Hamburg  
Germany

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**ISBN: 978-92-820-1230-7**

# CONTENTS

<b>ABBREVIATIONS</b>	06
<b>FOREWORD</b>	09
<b>CHAPTER 1</b>	
<b>CONFINTEA, the Mid-Term Review 2017 and the SDGs</b>	11
What is CONFINTEA?	13
What is the Mid-Term Review?	13
New influences since CONFINTEA VI	15
The purposes of the Mid-Term Review	16
The Civil Society Forum review	17
Towards CONFINTEA VII	19
<b>CHAPTER 2</b>	
<b>Setting the standards for adult learning and education</b>	21
Introduction: Instruments and standards	23
<i>The growth of standards</i>	23
The Belém Framework for Action	26
<i>The BFA's context</i>	26
<i>Recognition of the importance of international instruments</i>	27
The Recommendation on Adult Learning and Education	29
<i>The RALE definition of ALE</i>	30
<i>The RALE definition of literacy</i>	32
<i>The RALE definition of adult and lifelong learning</i>	33
The Global Report on Adult Learning and Education	34
The impact of GRALE and RALE	35
The 2030 Agenda for Sustainable Development	36
The way forward	37
<b>CHAPTER 3</b>	
<b>Progress, challenges and opportunities</b>	39
Introduction	41
What has happened from 2009 to 2017?	42
Progress since 2009	44

<i>Policy</i>	45
<i>Governance</i>	49
<i>Financing</i>	50
<i>Participation, inclusion and equity</i>	51
<i>Quality</i>	52
<i>The impact of ALE</i>	55
<i>International cooperation</i>	58
Challenges and opportunities	60
<i>Policy challenges</i>	60
<i>Governance challenges</i>	63
<i>Financing challenges</i>	64
<i>Participation, inclusion and equity challenges</i>	65
<i>Quality challenges and possibilities</i>	66
<i>A major challenge and possibility of engaging with the Sustainable Development Goals</i>	67
<i>Some conclusions</i>	68

## **CHAPTER 4**

<b>Improving action: Effective practices and lessons learned</b>	69
<i>The learning city of Suwon, Republic of Korea</i>	71
<i>The growth in learning opportunities</i>	72
<i>Digital platforms</i>	72
<i>Learning for senior citizens</i>	73
<i>Illiteracy</i>	73
<i>Learning for the disadvantaged</i>	73
<i>Impact on communities</i>	74
<i>Recent developments: Creating a coordinated structure involving all stakeholders</i>	74
<i>Monitoring and evaluation</i>	75
<i>The Kha Ri Gude adult literacy campaign, South Africa</i>	76
<i>Lessons from the two case studies</i>	82

## **CHAPTER 5**

<b>Implementing ALE in the context of SDG 4 – Education 2030</b>	85
<i>Towards 2030</i>	87
<i>The BFA, GRALE and the SDGs: The importance of cross-sectoral implementation</i>	88
<i>RALE on intersectorality in the three types of ALE</i>	90

<i>ALE and basic skills</i>	90
<i>ALE and vocational skills, continuing education and training, and professional development</i>	91
<i>ALE and active citizenship skills</i>	93
Implementing the Belém Framework for Action to reach the Sustainable Development Goals	94
Implementing ALE linkages with the SDGs	99
<b>CHAPTER 6</b>	
<b>Monitoring and measurement of ALE at country and global level</b>	101
Introduction: Are there quality data on achievements?	103
The current monitoring situation and its inadequacy	103
The RALE on the collection of data	105
The role of GRALE in monitoring and evaluation	105
The role of the regional reports	106
Monitoring, evaluation and research capacity	107
The issue of the monitoring of quality	108
The issue of impact studies	108
Monitoring ALE in relation to SDG 4 indicators	109
Some conclusions on monitoring and measurement	110
<b>CHAPTER 7</b>	
<b>Conclusions: Towards CONFINTEA VII</b>	111
<b>REFERENCES</b>	119

## ABBREVIATIONS

<b>AEPIA</b>	Observatorio Aprendizajes y Educación de Personas Jóvenes y Adultas de América Latina y el Caribe [Observatory on Youth and Adult Education for Latin America and the Caribbean]
<b>ALE</b>	Adult learning and education
<b>ASPBAE</b>	Asia South Pacific Association for Basic and Adult Education
<b>ASEAN</b>	Association of Southeast Asian Nations
<b>BFA</b>	Belém Framework for Action
<b>CaPED</b>	Capacity Development for Education Programme
<b>CaPEFA</b>	Capacity Development for Education for All
<b>CEAAL</b>	Consejo de Educación de Adultos de América Latina [Council of Adult Education in Latin America and the Caribbean]
<b>CLADE</b>	Campaña Latinoamericana por el Derecho a la Educación [Latin American Campaign for the Right to Education]
<b>CSO</b>	Civil society organization
<b>DVV</b>	Deutscher Volkshochschul-Verband [German Adult Education Association]
<b>EFA</b>	Education for All
<b>EPJA</b>	Educación de personas jóvenes y adultas [Youth and adult education]
<b>EQF</b>	European Qualifications Framework
<b>GAL</b>	Global Alliance for Literacy within the Framework of Lifelong Learning
<b>GAML</b>	Global Alliance to Monitor Learning
<b>GDP</b>	Gross domestic product
<b>GEM</b>	Global Education Monitoring report
<b>GRALE</b>	Global Report on Adult Learning and Education
<b>ICAE</b>	International Council for Adult Education
<b>ICT</b>	Information and communications technology
<b>IMF</b>	International Monetary Fund
<b>ISCED</b>	International Standard Classification of Education

<b>LAMP</b>	Literacy Assessment Measurement Programme
<b>NEET</b>	Not in education, employment or training
<b>NFE</b>	Non-formal education
<b>NILE</b>	National Institute for Lifelong Education
<b>NQF</b>	National qualifications framework
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>OEI</b>	Organización de Estados Iberoamericanos [Organization of Ibero-American States]
<b>OER</b>	Open educational resources
<b>PIAAC</b>	Programme for the International Assessment of Adult Competencies
<b>RALE</b>	Recommendation on Adult Learning and Education
<b>REDLECE</b>	Red Latinoamericana de Educación en Contextos de Encierro [Latin American Network of Education in Contexts of Imprisonment]
<b>RVA</b>	Recognition, validation and accreditation
<b>SAARC</b>	Asian Association for Regional Cooperation
<b>SDG</b>	Sustainable Development Goal
<b>SEAMEO</b>	Southeast Asian Ministers of Education Organization
<b>STEM</b>	Science, technology, engineering and mathematics
<b>TVET</b>	Technical and vocational education and training
<b>UIL</b>	UNESCO Institute for Lifelong Learning
<b>UIS</b>	UNESCO Institute for Statistics
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organization
<b>UNITAR</b>	United Nations Institute for Training and Research
<b>UNDP</b>	United Nations Development Programme
<b>YALE</b>	Youth and adult learning and education



## FOREWORD

The CONFINTEA VI Mid-Term Review (MTR) Conference took place in Suwon and Osan, Republic of Korea, in October 2017. Stakeholders from 95 UNESCO Member States assessed progress in implementing the Belém Framework for Action (BFA) and discussed the next steps. The BFA, which was adopted by delegates at the Sixth International Conference on Adult Education (CONFINTEA VI) in Belém, Brazil, in December 2009, records the commitments of Member States and presents a strategic guide for the future development of adult learning and education (ALE) within the perspective of lifelong learning.

In 2015, in the course of agreeing the Education 2030 Framework for Action as the guiding instrument to achieve the targets of Sustainable Development Goal 4 on education, Member States adopted the UNESCO *Recommendation on Adult Learning and Education*. This normative instrument identifies the three key fields of learning to be addressed by ALE: literacy and basic skills, continuing training and professional development, and active citizenship skills. Together with the five areas of action introduced by the BFA – policy, governance, financing, participation inclusion and equity, and quality – they form a comprehensive matrix for analysing not only major trends and developments, but also shortcomings in provision, as well as priorities to support further improvements in ALE.

Implementation of both frameworks is regularly assessed through UNESCO's *Global Report on Adult Learning and Education (GRALE)*. The third edition (*GRALE 3*) served as a key background document for the MTR conference, at which more than 350 delegates discussed innovations and new developments in ALE policy and practice. They elaborated and adopted the *Suwon-Osan CONFINTEA VI Mid-Term Review Statement: The power of adult learning and education; a vision towards 2030*. This statement outlines the guiding principles and main strategies for the international ALE community and looks towards CONFINTEA VII, planned for 2022. Besides the Statement, a report of the Mid-Term Review Conference and its sessions, is also available.<sup>1</sup>

1 CONFINTEA VI Mid-Term Review: Report of the conference:  
<https://unesdoc.unesco.org/ark:/48223/pf0000260720>

This publication constitutes the third outcome document of the conference. It provides an overview of the main thematic debates. The chapters follow the conference themes and aim to illustrate or underpin the main arguments and way forward set out in the *Suwon-Osan Statement*.

**David Atchoarena**  
**Director, UIL**

# **CHAPTER 1**

## **CONFINTEA, THE MID-TERM REVIEW 2017 AND THE SDGs**

## WHAT IS CONFITEA?

CONFITEA is UNESCO's International Conference on Adult Education. It has taken place roughly every 12 years since 1949 in order to promote adult education in UNESCO Member States. It last convened in December 2009, in Belém, Brazil.

At the 2009 CONFITEA, 144 Member States adopted the Belém Framework for Action (BFA) (UIL, 2010*b*) with the aim of strengthening adult education. The UNESCO Institute for Lifelong Learning (UIL), with support from the UNESCO Institute for Statistics (UIS) and UNESCO offices in the different world regions, coordinates the global monitoring of the follow-up to the BFA.

## WHAT IS THE MID-TERM REVIEW?

As part of the post-Belém follow-up, the UNESCO Institute for Lifelong Learning organized a Mid-Term Review. Apart from the CONFITEA gathering itself, the Mid-Term Review is currently the most inclusive and expert global forum on adult learning and education (ALE) that attempts to bridge policy and practice, bringing together decision-makers from government, civil society, academia and the private sector to learn from the past and set the stage for the future.

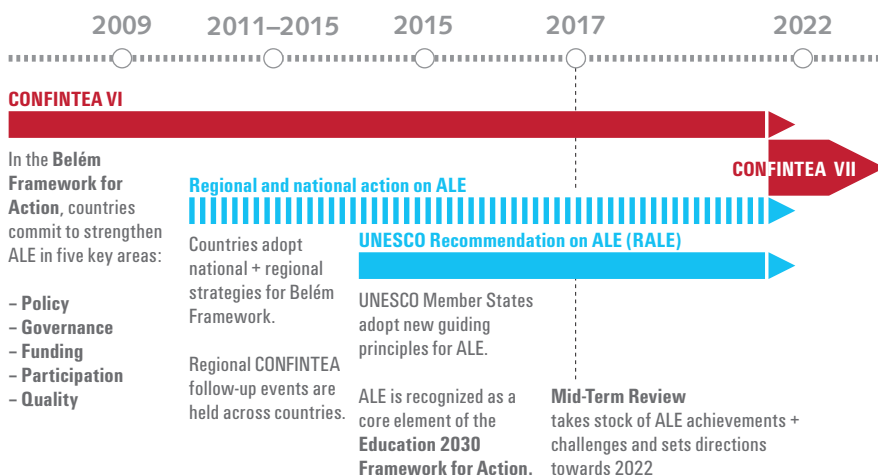
The Mid-Term Review was designed to seek answers to three questions:

- Have Member States made progress in implementing the BFA?
- What challenges have they faced, and what lessons can they share?
- What should their priorities be, particularly in relation to the supportive role ALE can play in achieving both the Sustainable Development Goals (SDGs) set out in the 2030 Agenda for Sustainable Development (United Nations, 2015*a*) and the targets of the Education 2030 Framework for Action (UNESCO, 2015) for the implementation of SDG 4?<sup>2</sup>

2 Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

This third question was of extreme importance, and much of the review addressed the relationship between ongoing progress in ALE and ALE's interconnectedness with activities aimed at achieving the SDGs.

### The Mid-Term Review in the context of the CONFINTEA VI to CONFINTEA VII timeline



Global Reports on Adult Learning and Education monitor progress and recommend ways forward



The latest Mid-Term Review was organized by UIL in cooperation with the Korean Ministry of Education, the Korean National Commission for UNESCO, the National Institute for Lifelong Education (NILE) and the municipalities of Suwon and Osan in the Republic of Korea. Other collaborating partners were UNESCO Bangkok and the International Council for Adult Education (ICAE). From 25 to 27 October 2017, some 325 participants from 95 countries came together to assess the implementation of the previous CONFINTEA's recommendations in Member States and pave the way towards the next CONFINTEA (CONFINTEA VII, to be held in 2022).

## NEW INFLUENCES SINCE CONFITEA VI

The 2017 Mid-Term Review takes as its point of departure the BFA. The period allotted to achieve both the Millennium Development Goals and the Education for All goals came to an end in 2015. Intensive international dialogue and debate provided a basis for envisioning the next phase of global development, articulated in the 2030 Agenda for Sustainable Development and its 17 SDGs, adopted at the United Nations in 2015. In the same year, the *Education 2030: Incheon Declaration and Framework for Action* (UNESCO, 2015) spelled out the related international agenda for education. Again in 2015, UNESCO adopted its *Recommendation on Adult Learning and Education (RALE)* (UIL, 2016), replacing the *Recommendation on the Development of Adult Education* of 1976 (UNESCO, 1976).

Alongside the development of this international consensus on development and educational goals, UIL initiated a CONFITEA VI follow-up process, holding a number of regional events and producing the *Global Report on Adult Learning and Education (GRALE)*, of which there are three to date, with a fourth edition due in 2019 in the run-up to CONFITEA VII in 2022. These reports, now supplemented by regional reports produced specially for this Mid-Term Review, are the first of their kind in the field of ALE.

The Mid-Term Review has therefore a rich set of inputs and frameworks within which to assess progress and envisage the future. In particular, *GRALE 3* (UIL, 2016) provided the latest data against which to check the implementation of the BFA.

In the process of the Mid-Term Review, the five key 'areas of action' specified in the BFA (policy; governance; financing; participation, equity and inclusion; and quality), together with the SDG 4 targets and the 2015 *RALE*, provided templates for the discussions analysing progress and planning effective strategies, stronger partnerships and robust monitoring frameworks for the future.

## THE PURPOSES OF THE MID-TERM REVIEW

According to the Mid-Term Review concept note, *The Power of Adult Learning: Vision 2030* (UIL, 2017a), issued before the conference, the event had six purposes, which were to:

- **take stock of progress**, activities and trends since 2009, sharing lessons and analysing the comprehensive findings and recommendations of the past three *GRALE* reports, and specifically those of *GRALE 3*;
- **evaluate the latest research** on ALE, particularly on its intersectoral benefits, finding powerful new arguments to raise awareness about ALE and strengthen the case for greater investment in it;
- **learn about innovations**, good practices and successful examples on how to improve ALE, but also learn about what did not work, and the challenges faced, based on the progress in implementation of the regional action plans to follow up on CONFINTEA VI;
- **strengthen existing partnerships and create new ones**, at global, regional and national level, in order to develop joint actions for ALE up to CONFINTEA VII (in 2022) and beyond, based on new regional surveys of developments;
- **explore the potential of stronger associations** between ALE providers and users;
- **agree on new ideas on how ALE can fit into broader policy reforms** to promote lifelong learning (e.g. *Education 2030 Incheon Declaration and Framework for Action*) and sustainable development (SDGs).

These purposes, if achieved, would enable the Mid-Term Review to identify strategies and measures to further improve policy, governance, financing, participation, inclusion and equity, and quality of ALE in UNESCO Member States within and between sectors, thus enhancing full implementation and sound monitoring of the BFA in the remaining years before CONFINTEA VII in 2022. It would also raise awareness among policy-makers, practitioners and researchers of the findings and recommendations of *GRALE 3*; the concepts and guidance provided by *RALE*; and of the implications of the Incheon Declaration, especially with regard to how ALE will contribute to achieving the SDG 4 commitments and related targets; and more broadly encourage the supportive contribution of ALE to sustainable development.

The final output of the Mid-Term Review was the *Suwon-Osan CONFITEA VI Mid-Term Review Statement* (UIL, 2018), unanimously adopted on the last day of the conference.

## THE CIVIL SOCIETY FORUM REVIEW

Apart from the representatives from Member States of UNESCO, a number of international organizations, universities, NGOs, the private sector and the media from all regions of the world also came together as the Civil Society Forum (CSF) to take stock of developments since 2009 and adopt a strategy for further implementation of the BFA until CONFITEA VII. This preparatory event took place on 24 October 2017 under the theme 'Civil society's contribution to securing the right to education and lifelong learning for youth and adults'. It was organized by the ICAE, a 50-year-old organization with over 100 member organizations representing more than 800 NGOs in more than 75 countries.

For civil society, this gathering offered the possibility of appraising the challenges and opportunities related to ALE in the current context, profiling its importance in the new global education and development agenda, and confronting the challenges related to its implementation on both the national and the global levels. Though SDG 4, agreed on by the United Nations in 2015, focuses on lifelong learning (LLL), adult education is the weakest link in this chain, especially in terms of funding.

For the full realization of SDG 4, and indeed all the other SDGs, it was necessary for the forum to discuss what kind of lifelong learning would need to be promoted in order to support learners worldwide and maximize the benefits of youth and adult education for sustainable development, and how to mobilize civil society and social movements to make this happen. Therefore ICAE, with its partners and members, organized the Civil Society Forum as a platform for civil society to inform the CONFITEA VI Mid-Term Review conference.

In her opening address, Katarina Popović (the Secretary-General of ICAE) stated that, eight years after CONFITEA VI in Belém, adult education was continuing to struggle through financial and other crises. Though there had been some action gains (for example in adult literacy activities) and ALE had helped in ensuring that the Millennium Development Goals (MDGs) and Education for All (EFA) made a greater impact, adult education still had a lack of dedicated funding. The world



was not yet in the state it should be: urgent issues included inequality, residual slavery, the impact of neoliberalism, climate change, ongoing conflicts, and a resurgence of populism, nationalism and racism. There was more of 'learning to survive and to earn' than 'learning to be and to do'.

Unfortunately, adult education was less visible than it had been: it was 'hidden' or 'lost' somewhere in lifelong learning. It was neglected, marginalized and underfunded. In this context and with the recurring crises for adult education, CONFINTEA still mattered as the only globally accepted instrument for the promotion and monitoring of adult education.

The Civil Society Forum then broke into regional groups and appraised progress in the implementation of the BFA. After that, they discussed progress and ongoing priorities in the three areas for action identified in *RALE*.

The BFA reminds us that ALE equips people with the necessary knowledge, capabilities, skills, competencies and values to exercise and advance their rights and take control of their destinies. It also underlines that it is an imperative for the achievement of equity and inclusion, for alleviating poverty and for building equitable, tolerant, sustainable and knowledge-based societies. In addition, *RALE* takes a comprehensive and systematic approach to ALE, reflecting the BFA's areas for action and defining three key domains: literacy and basic skills; continuing education and vocational skills; and liberal, popular and community education and citizenship skills. *RALE* builds on the idea of literacy presented in the Belém Framework for Action: literacy as an indispensable foundation of ALE, thus equally part of the right to education as well as a prerequisite for the development of personal, social, economic and political empowerment.

Out of these discussions and debates a set of recommendations were made and summarized in a statement from the Civil Society Forum. It was then formally presented to the Mid-Term Review conference.

The Civil Society Forum statement stresses that education and learning throughout life is a fundamental human right, and a public good that is key to promoting educational, social, economic and environmental justice, democratic participation, citizenship values (like solidarity) and reducing widespread inequalities. However, ALE is the least supported link in the lifelong learning chain and therefore its position should be strengthened, secured and fully recognized in order to make sure that

all adults are not left behind. The political commitment to promoting the fully inclusive understanding of lifelong learning is imperative.

In terms of competencies, the challenges of our times call for ALE to be organized in an integrated and holistic manner. Such a comprehensive perspective would take into account formal, non-formal and informal learning. It would incorporate and connect basic education, training of skills and capacities for effective and decent work, and developing capacities for life and social and personal development. It would recognize a diversity of ways of learning and knowing, including indigenous knowledge. Quality adult education, training and learning must encompass the full range of capacities that are needed in the world of work, in society and for everyday life. It should include Education for Sustainable Development and Global Citizenship Education.

It was clear in the Civil Society Forum discussions that there was a shifting emphasis in national ALE discourses, from a socio-political agenda of transformation and human development to an economic agenda of skill-building, market orientation and economic growth.

## **TOWARDS CONFITEA VII**

The Suwon-Osan CONFITEA VI Mid-Term Review Statement recognized that conceptual inconsistencies remained, and reaffirmed the fundamental right to lifelong learning as a precondition for the realization of all other human rights, and a public good of which the state is the duty bearer.

The chapters in this publication look at some of the major issues examined in the Mid-Term Review, including standardization moves, progress and challenges in ALE, how current efforts in ALE can be synchronized with the international drive to reach the SDGs by 2030 and, lastly, how ALE achievements can be monitored and measured. All this is to be addressed in the short timescale before the next CONFITEA in 2022.

## **CHAPTER 2**

# **SETTING THE STANDARDS FOR ADULT LEARNING AND EDUCATION**

## INTRODUCTION: INSTRUMENTS AND STANDARDS

Since UNESCO's last International Conference on Adult Education (CONFINTEA VI), held in Belém, Brazil, in 2009, there has been significant development in making available instruments and standards to both guide and monitor the worldwide progress of adult learning and education (ALE).

In the context of ALE, an 'instrument' (which we normally think of as being a physical tool for delicate or precision work) is a written set of guidelines, procedures or questions to gather information that can be used to analyse ALE, its contexts, thinking and practice in as precise a way as possible. Such instruments, including various templates, matrices, regulations and guidelines, encourage us to look at ALE in certain ways, as if through a lens, focusing on what is considered important. Similarly, standards (now increasingly prominent in the world of education at all levels) can range from knowledge and practice ones for educators and learners through to broader indicators of quality in learning.

This chapter looks at the progress in setting standards in ALE and the role of some of the key instruments that have been made available since 2009, starting with the product of CONFINTEA VI itself, the Belém Framework for Action.

### THE GROWTH OF STANDARDS

Learning standards are one of the most important issues in education and training today, influencing every dimension of educational systems, from high-stakes standardized testing, to determining the content knowledge and skills that students are taught, through to the professional development that educators need to be effective. Standards are used to set clear, measurable goals, to inform the design of instruction, to indicate what needs to be assessed, and help keep educators accountable.

UNESCO plays a key role in setting standards, and recognizes that, as education systems become increasingly interconnected, there is greater need to set global standards in various spheres of education (UNESCO, 2014a, p. 10). UNESCO has to anticipate and respond to these emerging trends and needs in education. This includes acting as a 'standard-setter: developing standards, norms and guidelines in key education areas, and monitoring the implementation and dissemination of successful educational policies and practices' (UNESCO, 2017b, p. 9).

**Learning standards** are concise written descriptions of what learners are expected to know and be able to do at a specific stage of, or at the end of, their education or training. Learning standards describe educational objectives or outcomes – i.e. what learners should have learned by the end of a course or grade or period of study – but they do not describe or prescribe any particular teaching practice, curriculum or assessment method (although this is a source of ongoing confusion and debate, as what is taught is increasingly guided by standards). The pervasive influence of globalization and mobility in the modern world has undoubtedly encouraged the use of clearly specified standards.

**Setting standards** implicitly sets relatively high expectations of the learners – as the standard applies to all – and is based on the belief that not holding learners (and educators) to a suitable standard effectively denies learners access to high-quality education and training.

Historically, standards were first associated with competency-based learning requiring mastery of specified knowledge and skills. Over time, standards were increasingly used in vocational training and in formal school education systems (such as the use of Common Core State Standards in the United States of America and the standardized testing associated with them). They can apply to subject areas, to specific academic disciplines, to skills training, and to national professional standards. Accreditation standards are used to accredit education and training institutions, programmes and qualifications.

For technical and vocational education and training (TVET), the move towards competency-based standards started in the mid-1970s and represented a response to criticisms that education and training programmes were failing to meet the practical requirements of employment. The curriculum base of such programmes was clearly out of alignment with the rapidly changing needs of employment. UNESCO's *Recommendation Concerning Technical and Vocational Education and Training (TVET)* (UNESCO, 2016b) states that (p. 11) 'Well-articulated outcome-based qualifications frameworks or systems based on learning outcomes and relating to a set of agreed standards should be established, in consultation with stakeholders, based on identified needs including occupational standards.'

In ALE, the influence of standards has been slower, but already in UNESCO's 1976 *Recommendation on the Development of Adult Education* was the proposal that:

Member States should foster agreements on the preparation and adoption of international standards in important fields, such as the teaching of foreign languages and basic studies, with a view to helping create a universally accepted unit-credit system. ... In order to facilitate international co-operation, Member States should apply to adult education the standards recommended at international level, in particular with regard to the presentation of statistical data (UNESCO, 1976, p. 13).

The Belém Framework for Action of 2009 recommended that 'international indicators and targets' should be developed for adult literacy, learner achievement should be 'recognized through appropriate assessment methods and instruments' and that UNESCO and its structures should 'develop guidelines on all learning outcomes'. There were challenges to 'developing quality criteria for curricula, learning materials and teaching methodologies in adult education programmes, taking account of outcomes and impact measures' and in 'elaborating criteria to assess the learning outcomes of adults at various levels' as well as in 'putting in place precise quality indicators'. However, in its Statement of Evidence, it did record progress in that 'effective instruments and systems of recognition, validation and accreditation of learning are gradually being put in place, including quality assurance bodies and procedures' (UIL, 2010b, pp. 3, 6, 7, 9).

The 2015 *Recommendation on Adult Learning and Education* (UNESCO, 2016a) is more direct and forceful about standards, particularly in relation to their use in monitoring quality of provision. Member States are asked to apply the recommendations, including:

25.(a) establishing mechanisms and/or structures that utilize appropriate quality criteria and standards, subject to periodic review;

...

(c) assessing the effectiveness and efficiency of programmes by measuring the extent to which they achieve the desired objectives, including in relation to their outcomes;

...

28.(e) establishing quality assurance mechanisms and programme monitoring and evaluation as integral components of

adult learning and education systems; setting quality standards, certifying adherence to these standards and disseminating, to the general public, information about providers adhering to the standards.

The very success of various schooling and adult education endeavours in the previous decade (such as the huge growth in primary school attendance) brought the issues of quality and the need for standards to the fore. Once access is achieved, quality becomes a major concern, to which standards are seen as one of the answers.

## THE BELÉM FRAMEWORK FOR ACTION

The Belém Framework for Action (BFA) of 2009 (UIL, 2010*b*) provides a framework for programmes of action in national states and at the international level. It carries forward the message of previous CONFINTEAs, such as the Hamburg Declaration (UIL, 1997), but in a new context, which it analyses in some detail, highlighting the contradictions present in the continuing globalization of the world with its growing knowledge economy, its rapid production, and its labour market and social communication changes.

### THE BFA'S CONTEXT

For the CONFINTEA VI Mid-Term Review 2017 (UIL, 2017*a*), the BFA's contextual analysis was updated in a set of regional reports, all of which noted some form of economic dismay. Africa had austerity, poverty and unemployment; the Arab States youth unemployment (and of course conflict and post-conflict problems); Asia, though it had growing economies, also had millions living in poverty; Latin America had high economic inequality; and Europe and North America also had post-2008 austerity and unemployment, as well as ageing populations and a new refugee and migrant crisis.

Alongside a growing knowledge economy were concerns about the quality of the education to prepare learners for it (in spite of the growth of universal primary education in Africa and Asia), the number of out-of-school children and youth, and the impact of social media.

Large-scale migration, which has a major impact on communities – for those left behind, for those migrating and for receiving communities

– also has an effect, as does unbridled urban growth, climate change and other environmental challenges, violent conflicts and shrinking democratic space.

In addition, there was a shifting emphasis in national ALE discourses, from a socio-political agenda of transformation and human development to an economic agenda of skill-building, market orientation and economic growth. The *Suwon-Osan CONFITEA VI Mid-Term Review Statement* (UIL, 2018) (hereafter referred to as the Suwon Statement) recognized that conceptual inconsistencies remained and reaffirmed the fundamental right to lifelong learning as a precondition for the realization of all other human rights, and a public good of which the state is the duty bearer.

## **RECOGNITION OF THE IMPORTANCE OF INTERNATIONAL INSTRUMENTS**

At Belém there had been a recognition of the importance of various international instruments that supported literacy and ALE, including:

- the six Education for All (EFA) goals (UNESCO, 2000) through government-led cooperation with United Nations agencies, civil society organizations, private providers and donors;
- the Education For All–Fast Track Initiative (now known as the Global Partnership for Education);
- the United Nations Literacy Decade (UNLD) (2003–2012) supporting worldwide advocacy and awareness-raising and the Literacy Initiative for Empowerment (LIFE) furnishing a global framework within UNLD to support countries with the greatest literacy needs;
- the two Millennium Development Goals (United Nations, 2000) that explicitly addressed education: achieving universal primary education and gender parity.

The BFA also recognized the key role of ALE in the achievement of the Millennium Development Goals (MDGs) and Education for All (EFA) goals to be achieved by 2015, alongside those of the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) of 1979 and the Beijing Declaration and Platform for Action of 1995 (UIL, 2010*b*).



However, the BFA noted that in *none* of these international efforts had there been a designated role for ALE beyond basic literacy and life skills, though the Decade of Education for Sustainable Development (2005–2014) set out a broad mandate in which adult learning and education *could* play a highly visible role (and in many countries did) (UNESCO, 2014a, b). The BFA was concerned that most education and training systems are still largely focused on the education and training of young people, and limited progress has been made in changing systems to reflect the need for learning throughout the life course, in particular in adult learning to create learning environments. Programmes and courses better suited for adults to learn and make use of their prior learning require the establishing of quality adult learning systems.

Taking all contextual factors into account, the BFA set out an ambitious list of recommendations (UIL, 2010b).

One of the important features of this list of recommendations was its architecture. It categorizes five main areas of action: policy, governance, financing, participation, inclusion and equity, and quality. This list becomes the key basis for the structuring of subsequent research, guidelines and reporting instruments.

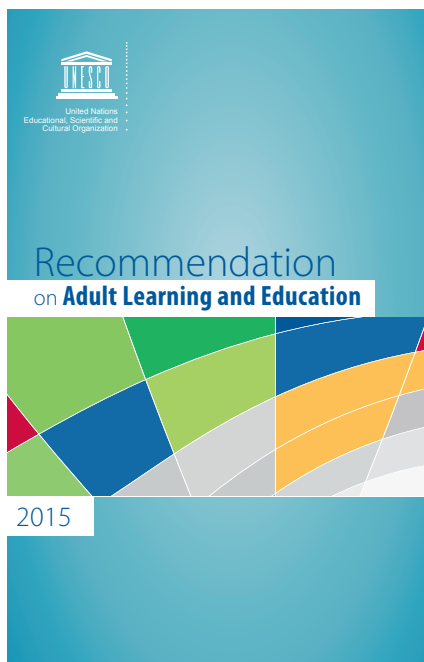
One must however note that, because of the particular challenges of inadequate literacy, the list was preceded by a section on literacy directed in particular to ‘preventing and breaking the cycle of low literacy and creating a fully literate world’ and provided a set of commitments relating to it, including recognizing literacy as a continuum, setting clear plans and goals, gaining resources, developing relevant provision and an enriched literate environment, and establishing international indicators and targets for literacy (*ibid.*, Section 11).

There was also a section on monitoring the implementation of the BFA, which took further the necessity to ‘develop guidelines on all learning outcomes, including those acquired through non-formal and informal learning’ and having ‘clear benchmarks and indicators’ for the monitoring mechanisms themselves (*ibid.*, Section 17).

The BFA became the guiding source in the structuring of two key post-Belém outputs, namely the 2015 *Recommendation on Adult Learning and Education (RALE)* and the *Global Report on Adult Learning and Education (GRALE)* reports. In a way that had not happened before, the production of *RALE* (UNESCO, 2016a) and the three *GRALE* reports (UIL, 2010a, 2013, 2016) provided an answer to several of the CONFINTEA VI commitments relating both to literacy and adult education in general,

as well as serving to help standardize the way ALE is spoken about and monitored. *RALE* provides the supportive framework that can guide *GRALE*'s future collection and analysis of information on the achievement of the BFA.

## THE RECOMMENDATION ON ADULT LEARNING AND EDUCATION



UNESCO's 2015 *Recommendation on Adult Learning and Education*, though a recent document, has already had influence as a normative instrument in the comprehensive and systematic reviewing and further development of quality ALE policies, concepts and practices since CONFITEA VI.

*RALE* is a much-needed revision, asked for in the BFA, of the 1976 *Recommendation on the Development of Adult Education*, and it reflects contemporary educational, cultural, political, social and economic challenges as set out in the Hamburg Declaration of 1997 and the BFA of 2009. Its

use will give renewed momentum to adult education, recognized in formal, non-formal and informal modes.

*RALE* takes a comprehensive and systematic approach to ALE. It:

- provides a broad and comprehensive definition of ALE and six objectives of ALE:
  - To develop the capacity of individuals to think critically and to act with autonomy and a sense of responsibility;
  - To reinforce the capacity to deal with and shape the developments taking place in the economy and the world of work;
  - To contribute to the creation of a learning society where every

individual has an opportunity to learn and fully participate in sustainable development processes and to enhance solidarity among people and communities;

- To promote peaceful coexistence and human rights;
- To foster resilience in young and older adults;
- To enhance awareness for the protection of the environment.
- identifies three key domains of learning: literacy and basic skills; continuing education and vocational skills; and active citizenship through community, popular or liberal education;
- differentiates five transversal areas of action (the same as those in the BFA: policy, governance, financing, participation, inclusion and equity, and quality);
- urges greater international cooperation and internal multi-stakeholder cooperation.

*RALE* thus serves as a valuable analytical, programmatic and advocacy instrument for promoting lifelong learning. It provides a comprehensive framework for decision-makers, researchers and practitioners in ALE and gives guiding principles for the further development of ALE in Member States. Clearly, *RALE* will have a powerful role in the CONFINTEA process and beyond, including as a framework for the national monitoring survey and report of *GRALE 4*. It was also recognized as a vital development by the Suwon Statement (which also acknowledged the *Recommendation concerning Technical, Vocational Education and Training* [UNESCO, 2016b], also revised in 2015, as another normative instrument to guide work in adult learning and education). In particular, the *RALE* definitions and categorizations are likely to prove extremely influential.

## THE RALE DEFINITION OF ALE

Adult learning and education is a core component of lifelong learning. It comprises all forms of education and learning that aim to ensure that all adults participate in their societies and the world of work. It denotes the entire body of learning processes, formal, non-formal and informal, whereby those regarded as adults by the society in which they live, develop and enrich their capabilities for living and working, both in their own interests and those of their communities, organizations and societies. Adult learning and

education involves sustained activities and processes of acquiring, recognizing, exchanging, and adapting capabilities. Given that the boundaries of youth and adulthood are shifting in most cultures, in this text the term ‘adult’ denotes all those who engage in adult learning and education, even if they have not reached the legal age of maturity (UIL, 2016).

This new definition of ALE incorporates much of the original definition of adult education laid down in the Nairobi *Recommendation on the Development of Adult Education* of 1976 and further developed in the Hamburg Declaration of 1997 (which was then endorsed by the BFA of 2009).

The significant definitional changes or enhancements include:

- Put lifelong learning up front – adult education is explicitly located as a component of lifelong learning – but drop the term ‘lifelong education and learning’ of 1976. This may reflect a terminological or ideological shift: ‘lifelong education’ stresses the provision of education (by the state), whereas ‘lifelong learning’ focuses on the agency (and responsibility) of the learner.
- More categorically, state that ‘the entire body of learning processes, formal, non-formal and informal’ are covered by ALE.
- Prioritize participation in society and the world of work.
- Use the language of capabilities, which emphasizes the functional capabilities that people have to achieve outcomes they value and have reason to value (rather than look at deficits).
- Include people not normally recognized as adults who participate in ALE programmes (thereby accommodating out-of-school youth and those young people not in education, employment or training [NEETs]). It is interesting that a cultural reason is given for this need for change (‘the boundaries of youth and adulthood are shifting in most cultures’) and not a lack of or inadequacies in initial schooling and failures in TVET systems.

ALE is seen as providing a variety of learning pathways and flexible learning opportunities, notably second-chance programmes to make up for lack of initial schooling, including programmes for people who have never been to school, early school-leavers and drop-outs.

## THE RALE DEFINITION OF LITERACY

Reaffirming that in the framework of lifelong learning, literacy constitutes an indispensable foundation and adult learning and education an integral part. Literacy and adult learning and education contribute to the realization of the right to education that enables adults to exercise other economic, political, social and cultural rights, and which should meet the key criteria of availability, accessibility, acceptability and adaptability. ... Literacy is a key component of adult learning and education. It involves a continuum of learning and proficiency levels which allows citizens to engage in lifelong learning and participate fully in community, workplace and wider society. It includes the ability to read and write, to identify, understand, interpret, create, communicate and compute, using printed and written materials, as well as the ability to solve problems in an increasingly technological and information-rich environment. Literacy is an essential means of building people's knowledge, skills and competencies to cope with the evolving challenges and complexities of life, culture, economy and society (UIL, 2016).

The *RALE* definition reaffirms the wording in the BFA that 'literacy is the most significant foundation upon which to build comprehensive, inclusive and integrated lifelong and life-wide learning for all young people and adults', which itself echoes the wording of the Hamburg Declaration that

Literacy, broadly conceived as the basic knowledge and skills needed by all in a rapidly changing world, is a fundamental human right. In every society literacy is a necessary skill in itself and one of the foundations of other life skills. ... Literacy is also a catalyst for participation in social, cultural, political and economic activities, and for learning throughout life (UIE, 1997).

The *RALE* conceptualization of literacy – 'Literacy and adult learning and education contribute to the realization of the right to education that enables adults to exercise other economic, political, social and cultural rights' – is also congruent with those of civil society formations, such as the International Council for Adult Education (ICAE), which argue that

literacy is an inherent part of the right to education and is the prerequisite for the development of personal, social, economic and political empowerment. Issues related to literacy are also discussed in Chapter 3.

## THE RALE CONCEPTION OF ADULT AND LIFELONG LEARNING

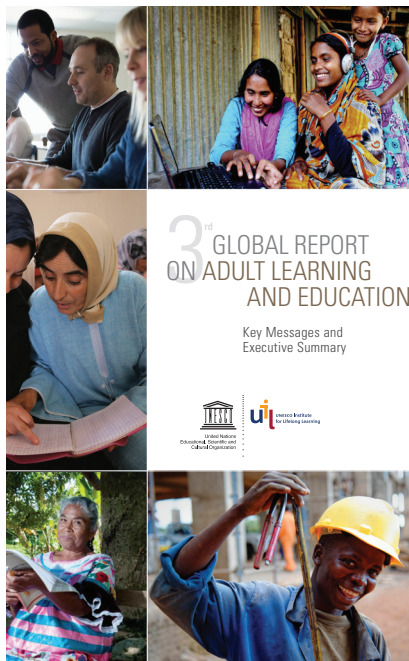
*RALE* sees ALE as a core component lifelong learning, 'a major building block of a learning society, and for the creation of learning communities, cities and regions' and a contributor 'to the realization of the right to education that enables adults to exercise other economic, political, social and cultural rights'. *RALE* spells out the empowering potential of ALE thus:

It empowers people to actively engage with social issues such as poverty, gender, intergenerational solidarity, social mobility, justice, equity, exclusion, violence, unemployment, environmental protection and climate change. It also helps people to lead a decent life, in terms of health and well-being, culture, spirituality and in all other ways that contribute to personal development and dignity. ... The aim of adult learning and education is to equip people with the necessary capabilities to exercise and realize their rights and take control of their destinies. It promotes personal and professional development, thereby supporting more active engagement by adults with their societies, communities and environments. It fosters sustainable and inclusive economic growth and decent work prospects for individuals. It is therefore a crucial tool in alleviating poverty, improving health and well-being and contributing to sustainable learning societies (UIL, 2016).

What *RALE* says about lifelong learning is somewhat more specific in its outcomes than the more general, but still fulsome, BFA description of it as

a philosophy, a conceptual framework and an organizing principle of all forms of education, based on inclusive, emancipatory, humanistic and democratic values; it is all-encompassing and integral to the vision of a knowledge-based society ... which embraces a learning continuum ranging from formal to non-formal to informal learning (UIL, 2010*b*).

## THE GLOBAL REPORT ON ADULT LEARNING AND EDUCATION



The production of a *Global Report on Adult Learning and Education (GRALE)* at regular intervals was one of the BFA commitments. At the global level the reports would ‘take stock and report periodically on progress in adult learning and education’. This commitment was met.

The third, and latest, *Global Report on Adult Learning and Education (GRALE 3)* was a key resource in informing the Mid-Term Review of 2017 of progress made in ALE in UNESCO Member States. *GRALE 3* of 2016 was particularly focused on the impact of ALE on health and well-being, employment and the

labour market, and on social, civic and community life.

Much information in the report was based on a survey of member countries. These were developed in partnership with UNESCO Institute for Statistics (UIS), the Global Education Monitoring Report, the World Health Organization (WHO), the International Labour Organization (ILO) and the Organisation for Economic Cooperation and Development (OECD). Conducted in 2015, 139 countries (71 per cent of Member States) responded to 75 questions, which covered the BFA areas of policy, governance, financing, participation, inclusion and equity, and quality.

*GRALE's* intersectoral approach to analysing developments in ALE has proven to be helpful particularly in strengthening the impact of ALE in various fields and in identifying the challenges to implementation. It helps disseminate a broader, expansive and intersectoral notion of ALE.

## THE IMPACT OF GRALE AND RALE

In a way that had not happened before, the production of the three *GRALE* reports (2009, 2013, 2016) and *RALE* have provided an answer to several of the CONFINTEA VI commitments relating both to literacy and adult education in general.

It needs to be noted that the production of *GRALE* and *RALE* are themselves achievements in their own right because they have enabled for the first time a coherent, analytical global understanding of progress in ALE in UNESCO Member States.

*GRALE* has managed to produce extremely thoughtful analyses of the data on the state of ALE as well as giving attention to thematic issues (*GRALE 2* looked at adult literacy; *GRALE 3* examined the impact of ALE on health and well-being, employment and the labour market, and social, civic and community life; *GRALE 4* will focus on participation and the context of SDG 4). *GRALE 1* and *GRALE 3* were backed up by thorough regional reports in 2009 and 2017, respectively. In other words, the international reporting of the state of ALE has reached a new level of excellence measured against clearer definitions, categories and standards. It is also true that, in spite of this progress, not all problems with inadequate Member State data are solved (as was noted in the regional reports). More is needed by way of case studies to back up the self-reporting process, more accurate data from civil society and on popular education, and imaginative research and rigorous assessment of the social impacts of ALE.

The *GRALE* reports had already used the BFA areas of action (policy, governance, financing, participation, inclusion and equity, and quality) as a basic format in analysis. *RALE* refines what needs to be done in the five areas, but also identifies three key fields of learning: literacy/basic skills, continuing education/professional development, and active citizenship skills. The resulting matrix allows us to analyse progress in the mentioned areas of action in relation to the three fields of learning. This matrix underlies the *GRALE* survey questionnaires to be filled by Member States. In addition, *RALE*'s helpful and comprehensive definitions of such things as ALE and literacy enables for the first time the real possibility of some standardization and genuine comparability in the collection and analysis of ALE data. Further, *RALE* provides Member State adult educators with the tools for advocacy for more comprehensive lifelong learning and ALE



policy development. (This data standardization and terminology refinement is discussed more fully in Chapter 6.)

Lastly, *RALE*'s recommendations on quality standards to be used in monitoring the quality of provision and the achievements of desired learning outcomes have encouraged ALE standards development, at both national and international levels.

## THE 2030 AGENDA FOR SUSTAINABLE DEVELOPMENT

Another 'lens' for looking at developments from 2009 to 2017 is the United Nations document, *Transforming our World: The 2030 Agenda for Sustainable Development* (United Nations, 2015a). Unlike *GRALE* and *RALE*, which are respectively descriptive and normative in orientation, the 2030 Agenda is a forward-looking, goal-setting instrument for international and national development action. There was a general consensus at the CONFITEA VI Mid-Term Review in October 2017 that ALE developments needed to synchronize with the 17 Sustainable Development Goals (SDGs).

### The 17 Sustainable Development Goals



Source: United Nations, 2017

For ALE there is a double benefit in being aligned with the SDGs. First, that achieving these goals actually requires adult learning as a key factor in their implementation and, second, that ALE can also gain momentum and be pulled forward in the slipstream of the concerted efforts and resource mobilization that will be made to achieve these goals by 2030. Certainly, these global goals will have a profound impact on ALE in the next two decades, and, indeed, their influence is already felt.

ALE can be found anchored in the 2030 Agenda, most visibly in SDG 4 ('Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'). At the Mid-Term Review, it was argued (English, 2017) that there are five key ALE policy implications of the 2030 Agenda (we will look how these challenges were or were not met in the next chapter):

1. To fulfil the right to education, governments need to provide adults with information and effective access to high-quality learning opportunities.
2. To ensure true lifelong learning, governments need to balance education spending along the life course.
3. To recognize the holistic nature of sustainable development, governments need to promote cross-sectoral coordination and budgeting.
4. Stronger partnerships are required among all stakeholders.
5. ALE needs to be part of the data revolution.

It is not that ALE's inclusion in development goals is new: at Belém there was recognition of the key role of ALE in the achievement of the Millennium Development Goals (MDGs) and the Education for All (EFA) goals.

## THE WAY FORWARD

Viewing the international ALE landscape since the BFA, through the *RALE*, SDGs and *GRALE* lenses, we are confronted with the following challenges at present and for the years leading up to CONFITEA VII:

- To continue to collect, analyse and learn from data on ALE developments using common categories, definitions, standards and templates.
- To encourage the understanding of ALE as a key component of lifelong

learning covering the continuum of learning in all its forms, from literacy to the highest levels across much of an individual's lifespan.

- To ensure that the role of ALE in reaching the SDGs is recognized and effected.

What is clear is that the energetic conceptual and monitoring work done through the BFA, *RALE* and *GRALE* has made surmounting these challenges much more doable.

## **CHAPTER 3**

# **PROGRESS, CHALLENGES AND OPPORTUNITIES**

## INTRODUCTION

The Suwon Statement issued by the CONFITEA VI Mid-Term Review conference in 2017 argues that substantial progress in adult learning and education can be identified across the world in the five areas of action defined by the Belém Framework for Action. These gains identified in the Suwon Statement are that (UIL, 2018, pp. 5–6):

more countries have adopted ALE policies, new partnerships have been founded at national and sub-national levels, commitments to increased funding have been made in some countries, participation in ALE is slowly growing, and useful instruments and processes have been put in place to improve the quality of ALE.

The main **challenges** noted in the Suwon Statement as remaining were the lack of adequate ALE policy, legislation and coordination mechanisms in many countries, and, more generally, that funding from governments and development partners is still less than it should be. Participation of marginalized and vulnerable communities and of women remains low. The quality of ALE programmes is undermined by the lack of trained personnel and few countries give recognition, validation and accreditation (RVA) to the outcomes of non-formal programmes. Some chronic issues continue (*ibid.*, p. 6):

Of particular concern is the slow increase in rates of youth and adult literacy, and, importantly, of proficiency levels of functional literacy and numeracy and digital skills on a continuum of learning. The gender gap also continues to be a concern and, despite notable progress in monitoring and evaluation since 2009, basic data on ALE remain insufficient.

Many opportunities are now opening for ALE activities assisting in the achievement of the Sustainable Development Goals (SDGs). ALE will need to synchronize with the SDGs, and greater resources, field-based research and more widespread dissemination of information would further add to its impact.

## WHAT HAS HAPPENED FROM 2009 TO 2017?

What developments in adult learning and education have taken place since 2009 and the CONFINTEA VI conference in Belém? How well has the Belém Framework for Action been implemented? What achievements have been made? Answers to these questions can be found in the *GRALE 2* and *GRALE 3* reports and the regional reports produced for the CONFINTEA Mid-Term Review of 2017 (UIL, 2013, 2016, 2017*b*, *c*, *d*, *e*, *f*, *g*). These documents summarize ALE achievements since 2009 using analytical categories (policy, governance, financing, participation, inclusion and equity, quality and, in addition, literacy and international cooperation) drawn from the BFA and, since 2016, from *RALE*. Further information on progress was articulated and examined at the Mid-Term Review conference.

The third *Global Report on Adult Learning and Education (GRALE 3)* provides key descriptive findings on the context of ALE in the period since CONFINTEA VI (English, 2017), including on what did and did not change:

- Countries report progress in all the five areas of the 2009 BFA.
- Levels of literacy amongst adults remain alarmingly low (with 758 million adults still unable to read or write) and gender inequality continues to be a concern.
- Despite notable progress in monitoring and evaluation since 2009, basic data on ALE continues to be inadequate, and thus the true effects of ALE are poorly understood – the right measures are needed to detect them.
- ALE is a key component of lifelong learning and will be a major contribution to the 2030 Agenda for Sustainable Development.
- ALE will face challenges in six global trend areas:
  - Inequality (particularly as it affects the vulnerable: refugees, migrants, those living in remote areas, women, etc.);
  - Employment, environment and climate change;
  - Accelerating technological change (especially in information and communication technology [ICT]);
  - Ageing populations (in the North);
  - Mass migration (from the South).

The set of five regional reports and a summary of the regional reports, *Progress, Challenges and Opportunities: The Status of Adult Learning and Education*, were developed by UIL as part of the 2017 Mid-Term Review in order to shed light on regional context-specific aspects of ALE (UIL, 2017b, c, d, e, f, g). They focused on the key accomplishments, improved practices, and factors enabling sector-wide implementation of youth and adult education policies and of programmes developed from a lifelong learning perspective.

### CONFINTEA VI Mid-Term Review 2017 regional reports and summary



## PROGRESS SINCE 2009

In very broad summary, *Table 1* lists the progress made in the five BFA areas of action (according to the countries that have supplied data).

**Table 1: Progress made in the five BFA areas of action**

<b>Policy</b>	<ul style="list-style-type: none"> <li>• 75 per cent of countries have improved ALE policies since 2009.</li> <li>• 71 per cent of countries have a framework for recognizing, validating and certificating non-formal and informal learning.</li> </ul>
<b>Governance</b>	<ul style="list-style-type: none"> <li>• 90 per cent of countries report that inter-ministerial coordination has become stronger.</li> <li>• 33 per cent of countries have an interdepartmental coordinating body to promote ALE for health.</li> <li>• 68 per cent of countries tailor ALE programmes to learners' needs by consulting stakeholders and civil society.</li> </ul>
<b>Financing</b>	<ul style="list-style-type: none"> <li>• 42 per cent of countries spend less than 1 per cent of their public education budgets on ALE.</li> <li>• 57 per cent of countries and 90 per cent of low-income countries plan to increase public spending on ALE.</li> </ul>
<b>Participation, inclusion and equity</b>	<ul style="list-style-type: none"> <li>• 60 per cent of countries report increased participation in ALE and 40 per cent of countries say that women participate more than men.</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>• 66 per cent of countries have information about completion rates and 72 per cent about certification, but fewer countries track employment outcomes (40 per cent) or social outcomes (such as health) (29 per cent).</li> <li>• 81 per cent of countries have pre-service and in-service training for adult educators.</li> </ul>



The following accounts are based on data from the regional and *GRALE* reports and from presentations made at the Mid-Term Review:

## POLICY

The BFA argued for the need for ALE policies and legislation to be comprehensive, inclusive and integrated within a lifelong and life-wide learning perspective, based on sector-wide and intersectoral approaches, covering and linking all components of learning and education. This would require the development and implementation of fully costed policies, well-targeted plans and legislation that, moreover, should be integrated into the Millennium Development Goals, the Education for All targets, and the United Nations Literacy Decade. (The 2015 *RALE* echoed these sentiments and made suggestions about suitable strategies for developing integrated policies using interdisciplinary and intersectoral knowledge and expertise, encompassing education and training policies and related policy areas, such as economic development, human resource development, labour, health, environment, justice, agriculture and culture.)

About three-quarters of countries have improved ALE policies since 2009 and have an official definition of ALE. In Latin America, 91 per cent of the region's *GRALE 3* participants provided a national definition (the highest of all regions). In Europe and North America, 36 countries have new post-2009 policies (decentralized ones in the case of North America). The European Union has been particularly energetic in producing major policy documents such as the *Renewed European Agenda for Adult Learning* (European Union, 2011) (and in supporting its implementation), and the *New Skills Agenda for Europe* (European Union, 2016). In Africa, there has been more political commitment, at least in relation to literacy and adult basic education (UIL, 2017f, pp. 10–15).

Understandably, different regions, and countries within them, have different policy foci:

- **Literacy and basic skills** (sometimes with school equivalence) remain a top priority of policies in Africa, the Arab States and parts of Asia and the Pacific, sometimes being linked to NEETs. By contrast, Europe and North America policies have focused on more **advanced skills** (for those lacking upper secondary education) and multi-modal forms of literacy (particularly digital 'literacy'). In Switzerland, which has highly

decentralized decision-making and largely private provision of ALE, it was found that a common, national policy was necessary in order to support local providers of basic skills for all in response to new societal challenges such as globalization, digitalization and upskilling.

- In many parts of the world there was a consistent linking of ALE policies with **income-generating activities** and general socio-economic concerns.
- **Popular education** remains a strong paradigm in Latin America.
- There was little focus on **ALE for youth** except in Latin America and the Caribbean. Here, however, youth and adult learning and education (YALE) is strongly associated with training in decontextualized globally marketable skills and with second-chance or compensatory schooling.
- Though most regions see the importance of ALE for **social cohesion and active citizenship**, this is not always recognized in policies.

## LIFELONG LEARNING POLICIES

Although lifelong learning was strongly in the forefront in Europe (European Commission, 2018), North America and in many parts of Asia, emerging as the overall policy paradigm in education (though in practice remaining somewhat isolated from mainstream education), for other regions this was not the case. In Africa, lifelong learning as the setting and framework for ALE is still a far distant goal, there are few broad definitions of ALE, and a full ALE continuum remains underdeveloped. In the Arab States, lifelong learning is not a reality yet, and more recognition is needed for non-formal education (which has an important role in learning for active citizenship and sustainable development). In Latin America, lifelong learning is not seen as being of practical relevance to the regional context (and one may remark here that, as in the example of new discourses on 'literacy and literacies', the discourse on lifelong learning in the North may be outpacing the rest of the world).

## THE SPECIAL CASE OF LITERACY POLICIES

Both the BFA and *RALE* give attention to that seemingly permanent agenda item – the advancing of literacy as a key ALE project (however much ALE activists wish that rapid progress could make basic literacy interventions redundant). Except for Europe, North America and Organisation for

Economic Co-operation and Development (OECD) countries elsewhere, basic literacy provision remains a big focus of state ALE policies. Progress has been slow in this regard in Africa, the Arab States and Latin America, but faster in parts of Asia (though gender disparity is still a problem there). However, literacy remains (or has now become) a focus for ALE in OECD countries, as can be seen in the regional reports as well as previous regional CONFITEA documents, e.g. from current European Union policy. There is, indeed, something of a dissonance between the highly industrialized countries and the poorer countries on the priority given to basic literacy. This is reflected in various CONFITEA-related statements that echo a discourse shift about 'literacy' (seen as the ability to read and write or as synonymous with basic skills) to more multi-modal literacies (seen as the highly contextual abilities of understanding and using print, visual images, computers, the Internet and other digital electronic technology, and the dominant symbol systems of a culture), even though there is a continuing acknowledgement of the need for basic literacy provision in the many countries which still have low levels of adult literacy and basic education.

The BFA argued that we must recognize literacy as a continuum (with a continuum of proficiency levels which vary in different contexts – and changes in those contexts and new technologies may demand higher levels) and accordingly develop 'literacy provision that is relevant and adapted to learners' needs and leads to functional and the sustainable knowledge, skills and competences of participants, empowering them to continue as lifelong learners' (UIL, 2010*b*, p. 6).

The regional reports from Africa and the Arab States note that concepts of literacy and literacy programmes often remained narrow and traditional. There was not much progress in seeing literacy as a continuum in Asia, and there was a lack of post-literacy continuity in Latin America, though monitoring by the Council of Popular Education of Latin America and the Caribbean (CEAAL) found an increase in literacy rates and broader conceptions of literacy beyond reading and writing and a greater involvement of stakeholders (UIL, 2017*e*).

The BFA had laid down a detailed list of commitments relating to relevant and sustainable literacy, including developing a roadmap with clear goals and deadlines, establishing international indicators and targets, mobilizing resources, using appropriate assessment methods, and reporting on progress. All these are clearly a continuing work in progress.

## INTEGRATION AND CONSULTATION

Both the BFA and *RALE* call for integrated policies inclusive of a wide range of stakeholders and for inter-ministerial cooperation. The BFA aimed for action towards comprehensive, inclusive and integrated policies with a lifelong and life-wide learning perspective that would be sector-wide and intersectoral. *RALE* also encouraged policy-making that involved all relevant stakeholders and strengthened or created inter-ministerial fora and similar structures and mechanisms. The regional reports suggest that awareness of ALE policies needed to be raised and there should be a wider dissemination of information about effective policies and practices.

Every region now agrees on the need for the integration of ALE as part of a comprehensive education system encompassing formal schooling and post-school education and training, as well as adult and non-formal education. At least rhetorically, a lifelong learning principle is accepted. In Europe, ALE programmes are already an integral part of the education system in most countries. This can also be demonstrated by individual countries in other world regions; for example, in the Republic of Korea.

Most regions reported improved consultation about policies. In Asia, this was especially important as many ALE programmes are NGO-implemented. In Europe (at both national and European Union level) there was considerable growth in consultation with stakeholders, but it tended to be largely only in the first phase (needs analysis) of a policy cycle. Europe recommended more stakeholder consultation on ALE policies. Latin America reported better coordination of local and regional development policies by different YALE providers.

## QUALIFICATION RECOGNITION FRAMEWORKS

Globally about 70 per cent of countries have some framework for recognizing, validating and accrediting (RVA) non-formal and informal learning.

In the European Union, 32 countries have linked their National Qualifications Frameworks to the European Qualifications Framework, though non-formal education needs more recognition. Asia and the Pacific have increasingly strong frameworks for recognizing ALE programme outcomes, and eight countries have RVA policies (one since 2009), though recognition of non-formal education remains a problem.

In the Arab States, though such RVA policies exist (especially in relation to basic skills, the unemployed, and low-skill jobs) in countries such as Algeria, Bahrain, Egypt, Jordan, Morocco, Saudi Arabia, United Arab Emirates and, most recently, the Syrian Arab Republic, they need activation and ALE is still largely isolated from mainstream education. There have been few new African developments in accreditation or certification.

## GOVERNANCE

The BFA had called for ‘representation by and participation of all stakeholders’ as indispensable for guaranteeing responsiveness to the needs of all learners, to be done by ‘creating and maintaining mechanisms for the involvement of public authorities at all administrative levels, civil society organizations, social partners, the private sector, community and adult learners’ and educators’ organizations in the development, implementation and evaluation of adult learning and education policies and programmes’ (UIL, 2010*b*, p. 7). This should be supported by ‘capacity-building measures to support the constructive and informed involvement of civil society organizations, community and adult learners’ organizations’, and the promotion of inter-sectoral, inter-ministerial cooperation and transnational cooperation (ibid.).

*RALE* strongly echoed these calls for the strengthening or creating of cooperative structures and participatory processes, such as multi-stakeholder partnerships, at local, national, regional and international levels to ensure democratic governance and responsiveness to the needs of all learners, in particular the most disadvantaged. It wants ‘mechanisms and processes at national and local levels that are flexible, responsive and decentralized’ (UNESCO, 2016*a*, p. 9). Good governance developments should be documented and disseminated so that they can be used as benchmarks.

*RALE* also endorsed the idea of ‘learning cities, towns and villages’ (an idea exemplified in the UNESCO Global Network of Learning Cities) that would result in (ibid., p. 10):

- (a) mobilizing resources to promote inclusive learning;
- (b) revitalizing learning in families and communities;
- (c) facilitating learning for and in the workplace;
- (d) extending the use of modern learning technologies;

- (e) enhancing quality and excellence in learning;
- (f) fostering a culture of learning throughout life.

Although all regions say that governance has improved somewhat since 2009, little evidence was supplied about these improvements in making governance more multi-ministerial, consultative, and participative. Some countries had post-CONFINTEA VI action plans but not much detail was given on these. The Asia regional report affirmed that there had been a convergence towards a stable programmatic approach to governance. Latin America stated that the governance of ALE remained neglected and marginalized (partly because NGOs are important providers of YALE services). In the Arab States, only a small majority of countries have an institution or governance entity responsible for ALE.

Consultation had improved; globally about two-thirds of countries tailor ALE programmes to learners' needs by consulting stakeholders and civil society.

Asia, Europe and North and Latin America all reported on growth of decentralization.

Nearly all countries report that inter-ministerial coordination has become stronger, though it remains weak in the Arab States and is not widespread in Europe.

## FINANCING

The financing of ALE remains a formidable challenge; most countries spend a very small proportion of their education budgets on ALE (42 per cent of countries spend less than 1 per cent of their education budget on ALE). The austerity that followed the Global Financial Crisis worsened an already difficult situation not just for adult education but also for the funding of schooling. Depreciation of many currencies also meant that even nominal rises in expenditure were eroded in real value. The situation was particularly dire in South Asia and Africa. Many countries, faced with competing claims for limited resources and an unfinished agenda of providing primary education for all, found it difficult to allocate additional funds to the education of adults in spite of the continuing need for basic literacy provision and large, expanding youth populations. These difficulties were exacerbated by the general trend of a decline in the proportion of funding for education in multilateral donor budgets.

The good news was that some countries *had* spent more on ALE and that some progress has been made towards achieving the goal of devoting 6 per cent of gross national product (GNP) to education. Some 57 per cent of countries, and 90 per cent of low-income countries, planned to increase public spending on ALE in the future.

There have been few significant innovations in ALE financing since 2009. Those few were modest in scale and often took some form of cost sharing with civil society partners. Even though these have been reported as innovative measures for financing ALE, most of them only involve restructuring government funding and do not bring about the enlargement of public funding allocations for ALE; they may even lead eventually to decreased government financing. Several countries, notably in Africa, received new funding from international bodies.

Some (mainly European) countries have (paid) training leave, and other countries have experimented with training vouchers (not always successfully, as for example with a pilot scheme in England) or individual lifelong learning accounts.

Nearly a quarter of the countries (in both the North and the South) did not have information on the scale of public investment in ALE. Of course, the diversity of provision, which often lacks focus or coordination, has complicated efforts to identify the budgets or expenditure dedicated to adult education. In many cases, budgets that serve adult education are not identifiable in budget lines explicitly designated as adult education but hidden elsewhere, in community or rural development, health, or skills training for the unemployed. In many countries, ALE continues to be seen as a temporary project and does not find a place in the regular national budget, leaving the sub-sector to depend essentially on extra-budgetary resources from NGOs and development partners.

## **PARTICIPATION, INCLUSION AND EQUITY**

Participation is a multi-dimensional indicator, and varies in length, intensity, level and the specificity of what is taught/learned. Having a clear picture of participation in ALE helps in the processes aiming to adjust policy, governance, financing and quality. (The upcoming *GRALE 4* report will be focused on participation, inclusion and equity, and will be a valuable reference source on this.)

Globally, 60 per cent of countries surveyed for *GRALE 3* (UIL, 2016, p. 50) indicated increased participation in ALE – though without much detail. Even general data on participation was often limited – almost 20 per cent of countries have no information on changes in participation rates (and in many cases no data on participation at all). In Asia, 40 per cent of countries have no information, in Africa 64 per cent had none, and there were few data from North America. It is, of course, recognized that the increasing diversity of programmes makes collecting such data difficult. Some Arab and European states had declined in participation, and in Europe a 15 per cent growth target was missed (though there was a growth in ALE for senior citizens, possibly because of an ageing population).

Everywhere there is obvious commitment to have more participation of women and disadvantaged groups, though in practice marginalized groups usually have weak participation; further, information on the participation of women, minority groups, refugees, the disabled and hard-to-reach groups was limited. Arab States and Europe had some refugee and migrant education (a consequence of instability in the Middle East and North Africa).

In Africa, the Arab States and Asia, women were usually a majority in literacy and non-formal education but low in technical and vocational programmes. The Asia regional report notes (UIL, 2017c, p. 35): 'It is important to examine critically the arrangements for delivery of technical and vocational training to ensure that these are not biased in favour of men and are not acting as barriers for participation of women.'

In Asia there was a special focus on rural areas (mainly for programmes related to income-generation) and literacy was a top priority in about 80 per cent of countries.

## QUALITY

The BFA has a clear position on quality (Section 16, pp. 8–9) – it is:

a holistic, multidimensional concept and practice that demands constant attention and continuous development. Fostering a culture of quality in adult learning requires relevant content and modes of delivery, learner-centred needs assessment, the acquisition of multiple competences and knowledge, the professionalization of



educators, the enrichment of learning environments and the empowerment of individuals and communities.

Virtually all countries agree that the quality of ALE needs to be improved (which requires more professionally trained educators, standards, benchmarks, and the data collecting, monitoring and research to confirm that the improvements take place).

The Suwon Statement affirmed the importance of quality, the RVA of the outcomes of ALE, the building up of ALE practitioners, better data collection, and the monitoring of quality. This quality enhancement needed funding.

All regions report that quality has improved with better monitoring and evaluation. About two-thirds of countries have information about completion rates and slightly more about certification, but fewer countries track employment outcomes (40 per cent) or social outcomes such as health (29 per cent). These percentages vary by region – thus, for example, only one-third of African countries collect data on completion rates; for the remainder, information on quality of outcomes was absent.

Some 81 per cent of countries have pre-service and in-service training for adult educators, a very positive development. For example, in Africa, ALE educators and trainers were receiving pre-service training in 84 per cent of countries. Pre-service qualifications were increasingly required in 91 per cent of countries.

## STANDARDIZATION AND BENCHMARKING

There is some ambiguity in the Mid-Term Review regional reports on the progress of standardization and benchmarking, whether in relation to learning outcomes, capacitation of educators and trainers, or other aspects of the ALE systems being monitored.

Asia has followed on from Europe in seeing some standardization through National Qualification Frameworks (NQFs). Equivalency programmes are often now evaluated in a standardized way. The European Union recommends linking NQFs to the European Qualifications Framework (EQF). Recognition, validation and accreditation systems have also improved across the Europe and North American region. The *Renewed European Agenda for Adult Learning* (European Union, 2011)

supports strengthening monitoring systems and systems for RVA. The Programme for the International Assessment of Adult Competencies (PIAAC) has surveyed key cognitive and workplace adult skills, mainly in Europe, and helps countries better understand how education and training systems can nurture these skills.

The German Adult Education Association, DVV International, has produced the Curriculum globALE, which is a modularized and competency-based framework curriculum for the training of adult educators worldwide (DVV International, 2015)

In Asia there had been attempts to adapt national core curricula for local use – a difficult balancing act between quality and standardization versus local contextual relevance. International cooperation has aided the convergence of standards across the Asia and Pacific region. As yet, debates about how far standardization is both desirable and possible in ALE are not prominent.

Africa reported low achievement of BFA goals of instituting common benchmarks and indicators in ALE. Capacitation at national level is still needed here and it is likely that without significant international support this will remain a weak area.

## PRE-SERVICE AND IN-SERVICE TRAINING FOR ADULT EDUCATORS

Globally, 81 per cent of countries have pre-service and in-service training for adult educators, and there has been growth in such training. There were general complaints, however, about the working conditions of adult educators, which inhibit professional development, and the lack of capacity for continuing in-service education and training of staff.

In Africa there has been growth in pre-service educator training and a demand for more pre-service qualification requirements (though not in all programmes). There has been rapid growth of in-service and continuing education for practitioners, but inadequate capacity, and there was little growth in capacity-building frameworks.

In Arab States, pre-service qualifications are required (though they are somewhat traditional) and there was a need for adult education as a discipline to be taken on by universities. Professional development was needed in TVET.

In Asia, the variety of providers makes standardized qualifications for ALE educators unrealistic, though some countries have national standards.

## LACK OF DATA INHIBITS MONITORING QUALITY

There was a general concern about the lack of adequate data on ALE and the lack of investment in research.

Two examples of positive examples of data collection come from Southern Africa – the DVV International initiative, Open Society Initiative Southern Africa (OSISA), published baseline studies on youth and adult learning in Angola, Lesotho, Mozambique, Namibia and Eswatini conducted by a sub-regional team (Aitchison, 2012; Figueira and Inácio, 2012; Jele, 2012; Luis, 2012; Setoi, 2012; Shaleyfu, 2012). In South Africa, the Kha Ri Gude Literacy Campaign, which ran from 2008 to 2017 and reached about 4.5 million people, collected data on participation and the assessment (nationally moderated) of all the learners (Aitchison and McKay, 2017).

## THE IMPACT OF ALE

The five regional reports presented to the Mid-Term Review, as well as *GRALE 3*, also looked at the impact of ALE and its benefits to health and well-being, employability and access to the labour market, and generally on social, civic and community life.

In both the BFA and *RALE*, the real impact of ALE on people's lives is given minimal attention. Both documents make only brief mention of the need to have 'outcome and impact measures' in relation to the quality of ALE. The BFA did, however, include the following (unreferenced) claim: 'It is estimated today that for every single year that the average level of education of the adult population is raised, there is a corresponding increase of 3.7 per cent in long-term economic growth and a 6 per cent increase in per capita income' (UIL, 2010*b*, p. 11).

*GRALE 3* devoted nearly half of its content to a detailed analysis of the impact of ALE on health and well-being, employment and the labour market, and on social, civic and community life. This groundbreaking material strove to uncover the links between ALE and these areas, examine the evidence-based research showing positive impacts of ALE, and suggest ways to overcome the dissonance between countries agreeing that ALE is highly useful yet not fully supporting it, as well as coordinating its integration into broader development interventions.

This latter point is important: 89 per cent of countries that responded to the *GRALE 3* question about the contribution made by ALE to health

said it made a large contribution; 50 per cent said ALE had a positive impact on employability and the labour market; and about two-thirds said that literacy programmes help develop democratic values, peaceful co-existence and community solidarity.

The regional reports presented to the Mid-Term Review all made some reference to the impact of ALE (largely based on *GRALE 3* data). They are summarized in *Table 2*.

All regions see ALE as addressing a large set of social, political, cultural, health and economic challenges, and locate these ALE activities within the broader picture of sustainable development. Policy-makers and practitioners clearly believe that ALE does indeed have a very positive impact on individual people's lives and that there is some evidence of this impact – for example, most countries saw positive evidence that ALE influenced people's health.

However, the evidence for these positive conclusions is modest and often semi-anecdotal. While accepting the known difficulties in establishing causal links between education (and particularly adult education) and such desirable impacts, more evidence-based research is needed – if only to assure the state and private funders of ALE that investment in ALE is worthwhile.

In relation to health, the evidence that illiteracy is a barrier to better health is quite substantial and gives impetus to the need for interdepartmental and multi-sectoral coordination of health-related ALE. The finding (Eggoh et al., 2015, p. 107) that health and education expenditure over a certain threshold does help economic growth can spur further attention to ALE's positive role in development.

While ALE authorities in many countries believe that ALE leads to economic benefits, this remains merely a belief – unless and until there is substantiating evidence that can be communicated to important stakeholders. More evidence is needed to prompt higher levels of investment in ALE. Though many countries in the world see initial vocational education and training as having the most positive impact on productivity and employment, there is a problem here: a lack of sufficient facilities in many parts of the world to provide such TVET to the graduates of basic education (whether from schools or adult education). For example, in Namibia the formal vocational training system only has places for about 3 per cent of school-leavers per year.

Positive perceptions abound about the societal outcomes of ALE, and most literacy and basic skills programmes deal with social and cultural

**Table 2: The impact of ALE**

<p><b>Health and well-being</b></p>	<ul style="list-style-type: none"> <li>• Some 89 per cent of countries agree that ALE contributes a great deal to personal health and well-being, encouraging healthy behaviours and attitudes that lead to longer life expectancy, a reduction in lifestyle diseases, and lowering the costs for acute healthcare.</li> <li>• Globally, about one-third of countries have an inter-departmental coordinating body to promote ALE for health.</li> <li>• In Africa there is increasing recognition of the value of ALE, some evidence of its impact on health, and illiteracy is seen as a major barrier to health progress.</li> <li>• In the United Kingdom of Great Britain and Northern Ireland, policies also recognize the impact of ALE on health.</li> </ul>
<p><b>Labour market and employment</b></p>	<ul style="list-style-type: none"> <li>• More than 50 per cent of countries agree that ALE has a positive effect on employability and labour markets, producing higher skills, better employability, higher wages, greater job satisfaction and commitment, improved productivity and entrepreneurship and increased tax revenues.</li> <li>• In Europe, policies have prioritized investments in ALE for upskilling and reskilling primarily as a response to rising unemployment levels.</li> </ul>
<p><b>Social, civic and community life</b></p>	<ul style="list-style-type: none"> <li>• A majority of countries in the regions say that literacy and other ALE programmes help develop democratic values, tolerance of diversity, peaceful coexistence and community solidarity, as well as attention to the environment and political participation.</li> <li>• Africa reported that most literacy and basic skills programmes deal with social and cultural development issues.</li> <li>• In Europe, there is support for education for common citizenship and tolerance as a counter to radicalization and terrorism.</li> </ul>

development issues. Unfortunately, in several regions there is little evidence available to prove the contention that ALE programmes have increased social capital. Though present, critical popular education perspectives are not prominent, which is unfortunate considering the current context of growing world inequality and the diversion of educational resources to the graduates of better schooling in higher education. Linked to the need for better data on participation is the need for research on impacts arising from ALE that is evidence-based and well-communicated. This will need support from academic institutions nationally and from the UNESCO Institute for Lifelong Learning and other international organizations.

On a positive note, that the measurement of outcomes and impacts is now solidly on the ALE agenda is a good sign of progress and maturation of ALE since the last CONFITEA.

## INTERNATIONAL COOPERATION

The BFA lauded international efforts to achieve the six Education for All (EFA) goals through government-led cooperation with United Nations agencies, civil society organizations, private providers and donors. However, it also complained that 'in none of these efforts has there been a designated role for adult learning and education beyond basic literacy and life skills' (UIL, 2010*b*, p. 11).

The BFA did not set out any guidelines for international cooperation in ALE, a task rectified in some detail in *RALE* (Sections 29 and 30): on stimulating ALE development, capacity-building, mutual cooperative assistance, networking and regional integration. *RALE* called for the regular exchange of information, documentation and materials on policies, concepts and practices in ALE, relevant research, and more adult learning and education professionals at national, regional and international levels. However, it cautioned against the mere transfer of structures, curricula, methods and techniques to other countries. In other words, there should be policy-learning rather than mere policy-borrowing.

International data-collection mechanisms based on agreed indicators and definitions should be enhanced (UIL and the *GRALE* play a key role in this). There should be building on countries' capacities to produce data, and the dissemination of such data at various levels. Lastly, *RALE* urges that specific clauses relating to ALE be incorporated into international

agreements concerned with cooperation in the fields of education, science and culture, and with the attainment of the SDGs.

The Mid-Term Review heard that European and North American countries benefit from European and OECD frameworks on adult learning, enabling benchmarking and qualifications comparisons, and enhancing international cooperation. In particular, the European Union supports international cooperation via funded programmes and there is some North–South cooperation. There are several European and North American ALE networks: for instance, the European Association for the Education of Adults (EAEA), the European Society for Research on the Education of Adults (ESREA), and the American Association for Adult and Continuing Education (AAACE).

In Latin America, international cooperation plays a role mainly in technical support. There is some evidence that Latin American popular education methods and ideas on knowledge have spread beyond the region. The following international or regional organizations are influential: UNESCO; the Organization of Ibero-American States (OEI); the Latin American Network of Education in Contexts of Imprisonment (RedLECE); regional NGOs such as the Council of Adult Education in Latin America and the Caribbean (CEAAL); the Latin American Campaign for the Right to Education (CLADE); and the Observatory on Youth and Adult Education for Latin America and the Caribbean (AEPJA).

International cooperation ‘has also provided an important space for the circulation of southern epistemologies, which reflect the culture, history and cosmologies of the indigenous populations of the region’ and in ‘the field of non-governmental cooperation, regional NGOs like CEAAL and the Latin American Campaign for the Right to Education, CLADE, have placed the affirmation and defence of education as a human right and the strengthening of active and participatory democracy in the countries of the region at the core of their political agenda. Both are strongly influenced by the paradigm of popular education’ (CEAAL, 2017, p. 12).

In Asia, UNESCO Bangkok was important for advocacy, dissemination and technical support. The following organizations also played important roles: the Association of Southeast Asian Nations (ASEAN); the South Asian Association for Regional Cooperation (SAARC); the Southeast Asian Ministers of Education Organization (SEAMEO); the Asia South Pacific Association for Basic and Adult Education (ASPBAE); Plan International; OXFAM; Action Aid; and DVV International.

In Africa, examples of international cooperation with funding, technical support, capacity-building, and research include UNESCO, CapEFA (now CapED), DVV International, the Commonwealth of Learning, and UIL. The Africa regional report also noted the region's positive responses to past international declarations and policy influences – e.g. the Dakar Framework for Action targets (UNESCO, 2000).

The Suwon Statement recorded that a number of post-CONFITEA VI follow-up regional and sub-regional conferences had been held and that the 'regional action plans developed by these meetings were useful for identifying and implementing necessary next steps for supporting the implementation of the BFA on regional, national and sub-national levels according to specificities of each region.'

## CHALLENGES AND OPPORTUNITIES

The flip side of progress is failure, regression, stalemate or simply no activity. The same sources that report on ALE progress are also frank on the challenges that remain – some of them long-standing and intractable (such as inadequate finance for ALE), others less obvious and often the result of inaction or the failure to take advantage of opportunities. More broadly, ALE will face challenges in six global trend areas: inequality, employment, environment and climate change, accelerating technological change (especially in ICT), ageing populations (in the North), and mass migration (from the South).

### POLICY CHALLENGES

A major policy challenge is to see ALE as no longer confined to the direction of a single ministry, e.g. the Ministry of Education or the Ministry of Culture, as has often been the situation in the past. The strategic and political steering of ALE should ideally allow for a continuous adjustment of strategies and interventions undertaken at the country level and requires a political dialogue among all development stakeholders, namely all ministries, civil society organizations, development partners, etc.

Another continuing challenge is that though most regions see the importance of ALE for social cohesion and active citizenship, this is not always recognized in policies. There is a range of policy related questions. Is ALE substantially contributing to the achievement of the Sustainable



Development Goals (English, 2017)? Are adults being given better information on and access to ALE? Is there ALE spending along the whole life course? Is there better cross-sectoral coordination together with stronger partnerships? Are ALE policies adapting to the data revolution and, more broadly, to the Fourth Industrial Revolution (4IR)?

## LIFELONG LEARNING POLICIES

Although lifelong learning is strongly to the forefront in international discourse as the overall policy paradigm in education in many regions, it receives mainly lip service in terms of practical commitment to its realization.

More information on ALE policy development and lifelong learning needs to be collected and shared and support given to Member States on developing implementable policies. Several suggestions have been made on the need for UIL to develop a more detailed up-to-date database of Member State ALE policies and to provide toolkits for policy formulation.

## LITERACY

The Suwon Statement expresses particular concern at the slow increase found in rates of youth and adult literacy and of ‘proficiency levels of functional literacy and numeracy and digital skills on a continuum of learning’ (UIL, 2018, p. 6). It was noted that poor countries were still faced with the realities of needing basic literacy provision, and that the removal of adult literacy from the Human Development Index in 2010 was a disincentive to prioritize and fund basic adult literacy programmes. The Suwon Statement asks that the United Nations Development Programme (UNDP) reverse its decision. It also acknowledges the importance of the Global Alliance for Literacy in the Framework of Lifelong Learning (GAL) in advancing the literacy agenda.

Generally, data on adult illiteracy was found inadequate, though there was some improvement in Latin America. It was notable that there was no clear indication as to the extent to which the EFA goal of reducing illiteracy by 50 per cent from 2000 levels by 2015 had been met (see Aitchison, 2016, pp. 129–134, on the complexities of confirming such reduction in relation to South Africa’s highly successful Kha Ri Gude literacy

campaign). Direct testing was taking place in Asia but was in foreign-funded surveys and unlikely to be institutionalized.

The regional reports highlighted some of the problems related to basic literacy:

- In Africa, universal primary education may in time lead to adult illiteracy becoming primarily a male problem (when both sexes have genuine equal access to schooling, boys tend, for various gender and contextual reasons, to drop out more easily).
- In Latin America, diversity and inequality pose challenges, as does the lack of an integrated and coordinated multi-sectoral approach.
- In the Arab States there was a need for literacy work to be re-orientated towards a new perspective and better teaching approaches and methods so that it can be more effective and relevant to marginalized groups, especially in the domains of health, the economy and social and cultural life.

## INFORMATION AND COMMUNICATIONS TECHNOLOGY IN ALE

The BFA did not say much about information and communications technologies (ICTs) other than in the annexed Statement of Evidence (UIL, 2010*b*, pp. 11–12):

Information and communications technologies and open and distance learning are being embraced and are slowly responding to the specific needs of learners who, until very recently, have been excluded.

The Suwon Statement is equally terse in its section on Literacy and Basic Skills (UIL, 2018, p. 7):

ICTs have great potential to improve access and promote equity and inclusion.

It is to *RALE* that one has to turn to have a more thorough treatment of the importance of ICT for adult education and learning (UNESCO, 2016*a*, p. 7).

Information and communication technologies (ICTs) are seen as holding great potential for improving access by adults to a

variety of learning opportunities and promoting equity and inclusion. They offer various innovative possibilities for realizing lifelong learning, reducing the dependence on traditional formal structures of education and permitting individualized learning. Through mobile devices, electronic networking, social media and on-line courses, adult learners can have access to opportunities to learn anytime and anywhere. Information and communication technologies have also considerable capacity for facilitating access to education for people with disabilities, permitting their fuller integration into society, as well as for other marginalized or disadvantaged groups.

Although the education and development potential of ICTs is noted (see Thöne, 2016), the broader influence, for good or ill, of ICTs, particularly through social media, and their potential impact on whether the ideal of an informed educated citizenry can be realized, is likely to be an immense challenge.

## **GOVERNANCE CHALLENGES**

Post-CONFINTEA VI it was clear that in many regions only a small minority of countries had institutions or governance entities responsible for ALE that saw it as their direct responsibility to develop action plans to guide the BFA and to ensure that there was coordination between a multiplicity of institutions and actors.

Most of the recommendations about governance from the regions to the Mid-Term Review are general in nature, and would be appropriate for all of the regions, because, in multiple ways, most of the problems or challenges are the same. All agreed that cross-sectoral governance structures were needed with adequate stakeholder consultation and strong quality.

Africa sought the development of a regional framework for capacity-building on working with different partners. Latin America wanted the governance of NGO and community-based organization (CBO) education programmes strengthened and YALE systems articulated across sectors in state and civil society. Both Africa and Asia made the point that data collected into a systematic information base should be a necessary component of all ALE governance systems.

## FINANCING CHALLENGES

The regional reports presented to the Mid-Term Review gave an overall picture of a desperate need for adequate (and consistent) funding. Although adult learning and education is high on the policy agenda of many governments, it is almost non-existent for others.

The already low levels of funding had not increased in real terms in recent years and the recent period of austerity had made things worse. Some 42 per cent of countries spend less than 1 per cent of their public education budgets on ALE. Africa spends less than 2 per cent at present. In Asia, 10 countries report spending 4 per cent or more, six between 0.5 per cent and 3.9 per cent, and seven between nil and 0.4 per cent. These percentages did not seem to correlate with estimates of the relative wealth or development in these countries. It was also reported that there was little prioritizing of funding for women, rural people and the disabled.

There had been a decline in international donor support for education (it goes rather to health and infrastructure) and the resolution of the Third International Conference on Financing for Development in 2015 did not mention ALE in any way, only child education (United Nations, 2015*b*, paragraph 78). The Suwon Statement specifically asks that (UIL, 2018, p. 9)

the International Commission on Financing Global Education Opportunity (Education Commission), the Global Partnership for Education, Education Cannot Wait and other development partners, as well as national and sub-national governments, to restore attention to and provide adequate funding for the full ALE agenda to achieve SDG 4.

What the optimal financing level for ALE is, and whether current investment levels fall short of this, is hard to tell, and we need to rely on indirect evidence for the value of investment in ALE. It is clear that there is a dissonance between the advocacy by ALE supporters in the various regions – who see ALE as having real investment value – and the non-recognition of the value of ALE at national and international levels. (This is one of the motivators of the strategic acceptance that future claims for investment in ALE would need to be aligned with SDG requirements.) The other point that needs to be made is that, if ALE indeed can have a positive productive impact on all key sectors of development, it needs

a significant part of the investment budget, and the funding devoted to ALE should come not only from the education budget, but from other ministries as well. The Arab States recommended establishing a special regional fund for ALE projects and incentives and private sector investment for TVET. Africa wanted ongoing technical support to build capacity to gather more accurate financial data and monitor donor-funding trends.

This latter point, the need for more accurate financial data, is a serious problem. Many countries did not have much information on ALE spending – in Africa, one-third of countries provided no information at all, and in Europe and North America the proportion was similar. It is, of course, recognized that the diversity of ALE provision makes estimating ALE expenditure difficult. Much ALE funding tends to be project-based and extra-budgetary. For example, adult literacy provision is seen as a temporary issue and is funded separately from the regular budget allocation. One of the things that is clear is that unless there is the creation of a separate allocation for ALE funding in national budgets there is little chance of integrating ALE into financial strategies across government departments and creating an integrated ALE strategy, as committed to under the BFA.

Alternative or innovative forms of financing were rare. Some African countries have developed an outsourcing strategy for adult literacy provision known as *faire-faire*, which involves cost-sharing with civil society organizations. Asia relies increasingly on fees and private resources. In some parts of Europe there is paid study leave and training vouchers.

## **PARTICIPATION, INCLUSION AND EQUITY CHALLENGES**

Whilst it is a truism that it is difficult to collect analysable data given the complexity and diversity of ALE provision and activities, the reality is that without data it is impossible to make sensible policies or design and implement programmes that actually respond to the situational needs and possibilities. In Asia, 40 per cent of countries have no information on participation, in Africa, 64 per cent had none, and there was little data from North America. The Arab States and Europe had some information on refugee and migrant education (the consequence of instability in the Middle East and North Africa). Generally, information on participation of minority groups, refugees and people with disabilities was limited.

Looking to the future, several regions recommended the digital transformation of ALE and the provision of online programmes to increase participation (especially of youth). One notes that the Suwon Statement says that ICTs have great potential to improve access and promote equity and inclusion. Countries could deploy a wide range of mobilization strategies to raise levels of participation (e.g., providing guidance and counselling, flexible learning trajectories, quality management, outreach strategies, accreditation of prior learning, and financial instruments). Whether such mobilization strategies are used, or work, will need to be monitored.

Europe recommended the integration of new delivery methods and new pathways of learning (the latter well-illustrated by the flexible upskilling pathways used for providing literacy, numeracy and digital skills to undereducated workers so that they could move into the upper secondary education and training required for digital technology-based workplaces [European Commission, 2016]). Africa wants more post-literacy and TVET provision, and the Arab world wanted more continuing training and professional development as well as programmes devoted to peace, culture and active citizenship.

## QUALITY CHALLENGES AND POSSIBILITIES

One of the recent impacts on quality of education as a whole has been the success in promoting access to schooling for the majority of children in poorer regions, and notably in Africa. But as access has grown, there has often been a corresponding decline in the quality of school education. Though more people now have basic skills, the level of adult literacy and basic education in many countries remains low.

The BFA committed Member States to develop quality criteria for curricula, materials and teaching methods, to professionalize adult educators, and give greater support to systematic interdisciplinary research in adult learning and education and its dissemination. *RALE* then explicated some of these commitments in detailed guidelines to action (Sections 25 to 28). Though something of a wishlist of desirable activities, the existence (or non-presence) of these activities (and the quality of those activities) can be determined. This provides scope for more effective monitoring of quality improvements in the next decade. Current efforts to develop a reference framework for quality in adult learning and education will support this.

For the Mid-Term Review, the Arab and European regions put stress on the importance of qualifications frameworks and of recognition, validation and accreditation (RVA) processes for quality assurance and encouraging participation. The Arab States wanted an actual RVA observatory. They also want a qualifications framework that integrates the outcomes of non-formal education and informal learning outcomes. The Europe and North America regions stressed that a comprehensive approach to quality is needed: one that can provide a consistent framework of principles, criteria and guidelines. It also looked at ICT and open educational resources (OER) as a way of delivering quality ALE that is flexible and accessible for all. Latin America noted the continued need for data, data analysis and, particularly, specific indicators on YALE which could contribute to improving the quality of provision, results and policy.

A quality framework should be flexible, open and transparent to all stakeholders in the adult learning sector; it should comprise both a technical and a political approach; it should take into account the particularities of the adult learning sector (serving different goals, provided by a wide diversity of providers, taking place in different learning environments, and the involvement of wide variety of social and economic actors); it should endorse the basic principles related to quality adult learning (that adult learning provision should be tailor-made, learner-centred and attuned to the specific learning needs of the adult learner); and it should be offered in a flexible manner in terms of duration, time, and place.

## **A MAJOR CHALLENGE AND POSSIBILITY OF ENGAGING WITH THE SUSTAINABLE DEVELOPMENT GOALS**

One of the greatest challenges, yet also a dramatic possibility, is linking the role of ALE to the realization of the Sustainable Development Goals (SDGs) and, more specifically, with the Education 2030 goals and targets (United Nations, 2015a, 2016; UNESCO, 2015, 2017a, 2017b). Many opportunities are now opening for ALE activities assisting in the achievement of each of the SDGs (see *GRALE 3* for many examples of such linkages in health, the labour market and civic life). Greater resources, field-based research and more widespread dissemination of information would further add to the impact of ALE. Alignment with the SDGs may also be crucial in the future financing of ALE by ensuring that it receives greater attention from funding organizations.

This SDG challenge is the topic of *Chapter 5*.

## SOME CONCLUSIONS

The Suwon CONFINTEA VI Mid-Term Review received pleasing evidence that there had been progress in at least three of the five areas demarcated by the BFA. There were better ALE policies, better governance and better attention to monitoring and quality. Given that this had occurred during a period of global financial austerity, this was extremely positive. The collection and analysis of data on ALE had been made easier and more rigorous by the use of the BFA area categories and the comprehensive and systematic approach provided by *RALE*. *GRALE* had taken up the issue of the impact of ALE.

The now-traditional challenges remain: the need for better cross-ministerial and cross-sectoral coordination, adequate finance and the need for research evidence of impact to encourage investment in ALE, and the necessity of taking seriously quality issues and the collection of adequate data. In the context of the growing inequality in the world, advocacy for a lifelong learning perspective is increasingly crucial for the empowerment of all.

The other challenge is the lack of reference to ALE in development cooperation agendas. However, it is precisely here that quality adult education and lifelong learning are at the heart of attitudes and skills needed for the achievement of the SDGs. This is the place for future action and growth.



## **CHAPTER 4**

# **IMPROVING ACTION: EFFECTIVE PRACTICES AND LESSONS LEARNED**

At the Mid-Term Review conference in October 2017, many examples were given in the regional reports, and in plenary and side presentations, of effective practices in ALE. Rather than present a listing of multiple programmes and projects, here, we will focus on two examples of success at opposite ends of the ALE continuum – one of an entire system of lifelong and life-wide learning, the other a programme of basic literacy and numeracy as a foundation for lifelong learning.

## THE LEARNING CITY OF SUWON, REPUBLIC OF KOREA

The city of Suwon in the Republic of Korea has a population of 1.25 million people; it is a major industrial centre, home of the Samsung electronics company. It is one of the world's leading 'learning cities' and operates over 600 Lifelong Learning Centres and institutions. Its development as a learning city started in 2005 and culminated in Suwon receiving the UNESCO Learning City Award in 2017. It is to be noted the neighbouring city of Osan is also a 'learning city' (Osan City, 2017).

Suwon's efforts to become a 'learning city' did not lead to overnight success. The campaign went through various stages of development from 2005, when an ordinance was promulgated and an initial declaration made. A taskforce produced mid- and long-term plans, a Lifelong Learning Centre and website were established, followed by an enormous expansion of activities and facilities since (Suwon City, 2017, p. 6).

Throughout this developing process there has been full participation of city residents, achieved by providing information about learning opportunities through broadcast and print media, and social and community networks, and through citizens' involvement in developing and approving plans at round-table meetings, and through local community forums. Various cultural events, academic conferences and lifelong learning festivals have been held regularly (UIL, 2017*h*).

Successful efforts to build participation in the development of Suwon's lifelong learning city strategy have been key to fostering public interest. Suwon has met the demands of its citizens and reached a broad public by promoting learning through multiple networks, on digital platforms, in public facilities and in local communities.

## THE GROWTH IN LEARNING OPPORTUNITIES

Between 2011 and 2016, the city more than doubled the number of people taking part in a variety of learning opportunities, and it is now estimated that over 791,000 people are participating in some form of learning: formal, non-formal and informal. 'In Suwon, everyone can be a learner, and almost everyone is' (UIL, 2017*h*, p. 144). The 600-plus facilities in locations across the city offer over 42,000 funded programmes and courses – an indication of the significant funding that has been poured into the learning city initiative.

One of the striking things about Suwon's 'triple A' approach, 'Learning for Anyone, Anywhere, in an eAsy way', that supports participation is the ease of physical access to facilities. The number of learning locations increased from 525 in 2011 to 614 in 2016, ensuring that people are always within walking distance of a site – i.e. never further than five minutes away from a learning facility and 10 minutes from one of the city's 153 libraries (17 large, 50 medium-sized and 86 small). Most facilities are accessible at all hours.

Another spur to participation is that individuals or groups who believe they have knowledge or skills to share are allowed access all the 614 venues for free when they are not being used for their initial purpose. The programme illustrates Suwon's will to empower its citizens to teach and learn anywhere.

Initiatives include education schemes for local residents, cultural and arts programmes, and local community-building projects.

## DIGITAL PLATFORMS

The city hosts various digital platforms that connect learners with individuals willing to share their knowledge on a voluntary basis. Lifelong learning e-classes (a system of massive open online courses [MOOCs] offering more than 900 lectures on a huge range of subjects including new technologies) are free of charge to city residents (*ibid.*, p. 145). The city also has also a volunteer programme linking quality education with employment opportunities.

Various public relations media channels ensure that citizens can readily acquire information about learning opportunities and networks. 'Hopeful Message Boards' displaying educational messages related to

culture, history and the humanities have been placed at bus stops and other locations across the city, reaching city-dwellers as they go about their daily lives.

## LEARNING FOR SENIOR CITIZENS

Suwon aims to counteract the challenges faced by an ageing Korean population, and has developed two innovative participatory education projects. One, 'Morado Hakgyo' ('Anything School'), enables senior citizens to study whatever they like, adapting its curriculum to suit the needs and demands of the elderly. The other, 'Nuguna Hakgyo' ('Anyone School'), is open to anyone who wishes to teach or learn, encouraging participation by enabling citizens to share their skills, and to engage with a huge variety of topics with a particular focus on intergenerational and cross-topical education for all. 'These schools encourage participation and enable citizens to become both teachers and learners; resolve the issue of unequal access to education; create jobs; and improve participants' skills and employability' (ibid., p. 145).

## ILLITERACY

Korea has all but eliminated illiteracy, but literacy classes are held to help foreigners and illiterate adults to integrate into society. The city is also supporting marginalized young people who want to re-enter education, thus offering them better chances in life.

## LEARNING FOR THE DISADVANTAGED

Suwon provides a support service for homeless people and underprivileged groups, including women, disadvantaged families and those on basic welfare who have lacked access to learning, so that they can exercise their right to education, return to learning and re-enter society. 'Suwon's success with such projects at the local level has made the city a leader in Korea's projects for community renaissance nationwide' (ibid., p. 149).

## IMPACT ON COMMUNITIES

Suwon's strategy is to create a 'lifelong learning city'. Included in the strategy are district task forces, which monitor the learning city projects; experts posted at learning centres across the city; and a network of lifelong learning facilities. The results have been positive. Not only have skills and knowledge increased but there has been a revival of communities within the city area and in the province as a whole.

Furthermore, citizens are becoming increasingly aware of the impact that their actions have on the environment: to date, 156,400 have participated in one of the 5,522 ecological education programmes that Suwon has organized across the city. With the development of a citywide learning community, individuals have been able to react more promptly to changes in the job market. Moreover, the learning sector itself has created many jobs, especially in the areas of teaching and course certification. Finally, the increase in learning opportunities centred on local culture and history has instilled a shared sense of pride in Suwon.

## RECENT DEVELOPMENTS: CREATING A COORDINATED STRUCTURE INVOLVING ALL STAKEHOLDERS

Suwon has facilitated the emergence of a comprehensive learning ecosystem across the city that involves all stakeholders. Building a learning city in Suwon led to a rapid surge in the number of learning activities and venues available.

The current responsibility of coordinating the learning city process lies with the Suwon Lifelong Learning Council, which oversees the participatory development, implementation and evaluation of related activities. The network that promotes learning in Suwon is made up of numerous organizations. These include, among others, the University Council, the Lifelong Learning Association, the Suwon Humanities Advisory Committee, the Suwon Literacy Teacher Council, and the Eco-Mobile Community Organizing Committee/Environmental Education Committee. To support the Lifelong Learning Council at neighbourhood level and to ensure that projects are implemented effectively, a municipal task force of experts has been established in each of the city's four districts.

The Suwon Lifelong Learning Council regularly liaises with the Municipal and National Councils for Community Building to exchange information on education-based activities that promote civic pride. Its partners also promote the city's progress at local, national and international levels. Furthermore, the city shares its best practice with regional and national organizations through the Korean Association of Lifelong Learning Cities and the Gyeonggi Province Working Council for Lifelong Learning.

## **MONITORING AND EVALUATION**

Suwon has developed two sets of learning-city evaluation indicators. These were designed to establish a transparent and fair evaluation of the learning city and ensure that outcomes are continuously monitored. The first set is on the foundations for a lifelong learning city (seven items) and the second set is of performance indicators (16 items). There are regular surveys on lifelong learning organizations and citizen satisfaction.

Both the Suwon Lifelong Learning Council and the Humanities City Advisory Committee are made up of representatives from non-governmental civil society organizations, education experts and representatives from the city's education office. They hold workshops, forums and performance evaluations to measure in detail Suwon's progress towards becoming a learning city. Evaluations consider the extent to which projects foster collaboration between civic experts and citizens, whether projects fit citizens' needs, and whether projects accommodate Suwon's unique identity based on its specific regional features. The findings inform the planning of future projects.

On completion, projects are evaluated in line with agreed procedures for accommodating feedback and identifying future improvements. The city has also produced learning-city outcome booklets and runs a course to train residents as lifelong learning monitors. This ensures that the voices of learners and other stakeholders in Suwon's learning organizations and programmes are heard, and that these voices are reflected in policies designed to promote the learning city's development.

## THE KHA RI GUDE ADULT LITERACY CAMPAIGN, SOUTH AFRICA

South Africa's national Kha Ri Gude Adult Literacy Programme concluded in 2017 after successfully operating since 2008. During that time, the programme reached more than 4 million learners, with 80 per cent of participants successfully completing the programme and submitting a portfolio of adequately completed literacy and numeracy exercises (that was nationally moderated). An analysis of its origins, planning, structure and operations is an instructive case study that resonates extremely well with the Belém Framework for Action.

The very origins of the campaign indicate the value of both research-based critiques of existing practice and the benefits of international cooperation. In 2005, the then South African Minister of Education, Naledi Pandor, openly acknowledged that the initial post-apartheid adult basic education night-school system had failed, as researchers had consistently reported. She had been impressed by Cuba's Yo, Sí Puedo adult literacy programme and sent a team to Cuba and Venezuela to study it. That team then developed a detailed comprehensive plan for a South African literacy campaign (which owed something to the organizational structure of the Cuban model, though it decided not to use the Yo, Sí Puedo literacy teaching method). Another factor that led to the initiation of Kha Ri Gude was the government's desire to reach the Education for All target of reducing illiteracy by half, which shows the important role that international development goals and targets can have.

Kha Ri Gude was launched in April 2008 after a two-year process of planning and development. An official report (Ministerial Committee on Literacy, 2006) provided a recommendation and plan.

The campaign provides a fascinating model of operation (and certainly of success) in comparison to the lacklustre state adult basic education system (which, though renamed, continues to this day).

The original design for the running of the campaign was not dissimilar from many other literacy campaigns where there is a central management/ oversight unit that is also responsible for the development of instructional plans and materials, and then a cascaded training of personnel, from national to provincial to district and then to local level. As with all such cascades, problems arise, particularly with regard to:

- the development of training and materials to the lowest level: that of the volunteer educator who teaches a group of learners;
- methods and effectiveness of the reporting back to headquarters on the running of the classes and the assessed achievements of the learners;
- the financial system for paying salaries and stipends to the personnel and volunteers at the various levels.

The campaign design was robust and scalable so that it could be rapidly adjusted to the number of participants and increases or reductions in the budget (though the final budget allocation was substantial, it was less than half of what had originally been envisaged). The operational plan dealt with the governance, coordination, educational and research structures of the campaign.

Curriculum, teaching and training had a very small national staff base, the Chief Executive Officer played a significant role here, aided by a training officer. However, most of the major curriculum decisions had already been made in 2006 and 2007 and the materials developed. The training officer coordinated a cascade of training of coordinators, supervisors and volunteer educators. There was an implicit (and correct) assumption that many of the higher-level staff, coordinators and supervisors would have had some form of adult basic educator training (many had also participated in an earlier national literacy campaign that had stalled).

The campaign employed an integrated and multilingual approach to literacy skills training. The programme curriculum integrated basic literacy skills training of learners in their mother tongue with life-skills training. The life-skills component of the programme placed great emphasis on subjects or themes that were central to the learners' socio-economic context or everyday issues, such as health (including HIV/AIDS awareness and prevention; nutrition and sanitation), civic education (e.g. human rights, conflict resolution and management; peace-building and gender and racial relations), environmental management and conservation, and income generation or livelihood development. In addition, the programme also provided some instruction in English (the dominant language of the bureaucracy and the workplace) as a second language in order to enable learners to conduct ordinary tasks such as filling in official forms. Participation was encouraged through radio advertising and there was a special sub-programme for both blind and deaf people; special Braille materials were produced.



The original plan argued for a substantial, specialized and semi-autonomous monitoring, evaluation and research component. The reduced budgets simply did not allow for this, though built into the coordination system was a systematic collection of data to be used for monitoring, reporting and research purposes. In 2009, the CEO appointed a subset of coordinator-level staff as monitors with a task equivalent to that of an inspectorate.

Except for the few officers in the Department of Education and the data-capture, call-centre and warehousing staff, and facilities at the private-sector centre, the campaign had no institutional bases or facilities. The service provider company was responsible for deliveries of materials to sites all over the country, including in rural areas. This required up-to-the-minute, accurate information on learner numbers, the languages that they would study in, and so on. Shortages or other problems had to be reported to the call centre for immediate redress. Payrolls and the authorization of electronic payments into bank accounts were reliant on accurate and timely rendition of registers and other reports from voluntary educators, supervisors and coordinators.

The implementation of a literacy campaign with this organizational structure required accurate, up-to-date data, collected and used efficiently and effectively. Learner data were captured in a number of forms: registration data, registers of attendance and the Learner Assessment Portfolio (McKay, 2015).

Unlike the practice in many literacy programmes, a conscious decision was made that formal assessment of learning would take place. The major assessment instrument was the Learning Assessment Portfolio (LAP), essentially a battery of exercises/ tests linked to the various stages in the reading, writing and numeracy curriculum. The completed LAPs had to be collected and stored centrally, where the marks were captured on the database and there verified by the South African Qualifications Authority (SAQA). This was a massive exercise. There has never been a time in South Africa when so many assessment scripts have been collected together in one place.

SAQA had been involved from the start in checking the alignment of the materials and assessment portfolio documents with appropriate levels on the National Qualifications Framework (NQF) and the first three levels of UNESCO's Literacy Assessment and Monitoring Programme (LAMP). Then, each year, SAQA ran a three-day LAP moderation workshop in

which a SAQA-appointed team of specialists (the senior verifiers) oversaw about 200 moderators and 20 verifiers who checked a large sample (usually at least 10 per cent) that reflected the distribution of languages and provinces of the LAPs submitted at the end of the previous year. Special attention was taken to identify signs of possible irregularities, and only a small percentage (ranging from 3 to 5 per cent over the years) of the sample exhibited such. At the end of the process the results of the successful students were loaded onto the National Learner's Records Database (NLRD) (Adler et al., 2009).

Conventionally, moderators (or external examiners) re-mark a percentage of scripts (usually 10 per cent or less) and, should they find a general trend for the original marks to be too high or too low, a statistical adjustment is made to all the candidates' marks. Kha Ri Gude verification, though it also encompassed traditional moderation, focused more on a different target – the marker, not the learner. All the assessment in Kha Ri Gude is site-based. The assessment via the Learner Assessment Portfolio (LAP) is overseen and marked by the educator in charge of the class. There are large variations in how the classes are run, the style of instruction, and in the timing and way in which the various portfolio activities (the assessment items) are handled. Although the outcomes being assessed are very basic and the criteria given to the educators straightforward, too much variation in the marking was considered a real possibility, particularly as many of the educators had fairly minimal training as literacy instructors.

The SAQA verification process therefore focused initially on the marking. The 'moderators' were asked to 'moderate' the marking. This, of course, required something of a mind shift, from looking at what the learner got right or wrong to what the marker got right or wrong. Some counterintuitive judgements have to be made, for example that a learner who got a very low mark may indeed have been marked in an excellent way or that a learner who got a very high mark may have been badly marked.

Another rationale for focussing on the marking is that the learners, once they have completed the programme, are gone for good. The markers remain – and improving their marking of the next cohort of learners is a high priority. The particular way in which Kha Ri Gude has managed its assessment, and the moderation and verification thereof, is elegantly straightforward and might be considered for other initiatives as well as

for primary schooling, particularly in those grades where there are no external examinations.

Financial data were of signal importance in the operations of the campaign. Clearly, the campaign as designed could not run without materials being printed and delivered, and then used in classes whose part-time teachers would be paid a small stipend. Yet the history of South African educational interventions is replete with disaster stories about corruption in textbook procurement and delivery, and about part-time educators who are either not paid, or who don't teach but are paid, or who don't exist or are dead but someone receives the payment (the so-called 'ghost teachers'). Because of the announcement in November 2006 that the government had approved a budget of ZAR 6.4 billion (approximately USD 445 million) for the new literacy initiative, it was also likely that the campaign would be the target of the entrepreneurs of educational procurement and delivery malfeasance. A robust financial system that was able to speedily interact with the other data flows was necessary not only to ensure the success of the campaign but also to see that it was not derailed. The impact of this rigorous financial management allied to a functioning and up-to-the-minute data system, which in turn led to dramatic cost savings, for example by 53 per cent from 2008 to 2009.

Because the Kha Ri Gude database had data on the numbers of learners per class, submission of LAPs from the class, etc., poorly performing educators could be identified and their services dispensed with or remedial action taken. It also enabled reports replete with accurate statistics to be issued on a regular basis for accountability and advocacy purposes.

The delivery infrastructure developed by the campaign worked extremely well and was, in principle, a valuable delivery mechanism available to all government departments (though it was only taken advantage of by the Expanded Public Works Programme). The stipendiary payments gave support to nearly 40,000 people per annum and brought significant income to poorer communities and rural areas.

Like South Africa before Kha Ri Gude, many countries have been hosts to failed educational management information systems. How is it then that the Kha Ri Gude information system actually worked? One has to firstly discount the idea that it is because the campaign headquarters staff were professional, zealous and hard-working (though they may well have been so). Many information systems have excellent hard-working

experts and professionals running them at the central level. The explanation has rather to be seen in the particular design of the system and what its main driver was.

A core driver of the Kha Ri Gude information system is that of payment of stipends to the personnel. Every aspect of the data collection is linked to the data required to enable payments to be authorized. Human self-interest (in being paid a stipend) therefore almost guarantees that data will be fed into the system – no data (in the form of registers, reports and assessment portfolios) means no money. This is a huge incentive to everybody at each level (people want to be paid and people do not want to be seen as not having done the data-submission work that enables them to be paid). Further, the data submission is nearly always timely because no stipends are paid in advance of the data submission for the month.

The second design feature that is significant is that though there are authorization steps for payment (steps at which data have to be available for the decision to be made), there are not too many (in effect four: supervisor endorses, coordinator endorses, service provider processes and generates list, Kha Ri Gude authorizes payment). By comparison, many other bureaucratic chains of authorization are many and cumbersome (in the state night schools, there could be up to 17 steps). With Kha Ri Gude, the connection between providing the raw data (registers, monthly reports, learner assessment portfolios) and being paid is straightforward, obvious and relatively prompt.

The third design feature (and one which severely limits the likelihood of fraud within the system) is that the person who authorizes at the first two steps is known and closely monitored. The design of data fields also requires data that can be easily correlated with other data (such as identity numbers, registration numbers, etc.).

Lastly, the Kha Ri Gude system was designed more or less as a new integrated system. It was not attached to some other existing system (and in particular, not welded onto some already dysfunctional system that was failing).

Kha Ri Gude has shown, in a very short space of time, that it is possible to run a successful data system if there has been a good design process and if, once implementation starts, it is well managed. Elements of professional design and management resources have been important in this success, but perhaps the most telling finding is that it works because it is in

the direct interests of the personnel in the campaign that it works. Hence, good, accurate, really useful data can be collected, processed and used in an educational system or programme. That this success took place in the often marginal and derided field of adult literacy and basic education is particularly good news. If it can be done there, it can be done anywhere.

Two failures have to be admitted in relation to the campaign. The first, the expectation that learners who had completed the six-month programme, which was equivalent to Grade 3, would then move into a next-level programme at the nearest state adult basic education night school was a false one. It is impossible to judge whether this was a failure of the Kha Ri Gude instructors to push or the state night school staff to pull, or that the learners simply were not attracted to the state night schools. The other failure was the plan to use the Kha Ri Gude structure to deliver higher-level education (and at a cost far less per learner than the state night schools) or other useful programmes (in association with other ministries) – a failure, undoubtedly, of the management of the campaign in its last three years.

The Kha Ri Gude campaign is a brilliant example of a large-scale intervention addressing the needs of poor, illiterate or semi-illiterate people which was successful because it had top-level political support, adequate funding, well-prepared materials and an extremely well-designed plan that reduced the risks of fraud and mismanagement. Its output (of learner achievement) was monitored and moderated by a reputable external body. Its failure, not of itself, but of the formal educational bureaucracy, was not to further capitalize on its system for wider inter- and cross-sectoral delivery.

## LESSONS FROM THE TWO CASE STUDIES

There are some interesting commonalities in these two case studies, though they seemingly are very different, one about a learning city at the forefront of the Fourth Industrial Revolution, the other about basic literacy and numeracy learning. These common features point to what makes for effective action in ALE.

- Both examples were driven by an initial political will to introduce change. Associated with this political will was a broad and challenging vision of what adult education could deliver.

- Considerable resources had to be mobilized, and in both case studies it is clear that the planning and preparatory stage was essential for mobilizing those resources and in gaining public support.
- Ease of access for the participant beneficiaries (and publicizing that accessibility) was crucial. In both cases access to learning sites and learning resources was made local.
- New, efficient systems, designed for purpose, with new ways of operating, were used. They did not have to contend with the dead weight of past bureaucracies or systems.
- Both examples provide varying degrees of cross-sectoral cooperation and interaction.
- The Suwon Statement specifically endorsed the idea of learning cities, urging Member States to strengthen the implementation of ALE at the local level using, inter alia, the learning cities approach.

## **CHAPTER 5**

# **IMPLEMENTING ALE IN THE CONTEXT OF SDG 4 – EDUCATION 2030**

Given the many opportunities for ALE activities to assist in the achievement of the SDGs, intersectoral implementation of ALE will be a major challenge for the next decade. Such action will need to be synchronized with the SDGs and targets, and more specifically with Education 2030 goals and targets (UNESCO, 2015, 2017a, b).

Making such an alignment may also be crucial in the future financing of ALE, by ensuring that it receives greater attention from funding organizations. Currently, gaining such attention remains a challenge. There is a lack of reference to ALE in development cooperation agendas. However, it is the contention of the worldwide ALE community that quality adult education and lifelong learning are at the heart of the attitudes and skills essential for the achievement of the SDGs. This is the place for ALE's future action and growth.

This chapter therefore looks at the implications of the ALE links with the 2030 Agenda for Sustainable Development, and how far the implications are likely to be realized given current global conditions, challenges and diverse contexts.

## TOWARDS 2030

The Belém Framework for Action, the 2015 *Recommendation on Adult Learning and Education* and the *Suwon-Osan CONFITEA VI Mid-Term Review Statement* of 2017, backed up by the research evidence in the *GRALE* and regional reports on ALE, have provided the field of adult education with directions and goals, together with guidelines and standards for practice.

The conclusion reached at the Mid-Term Review held in Suwon in late 2017 was that, reviewing past action to achieve the BFA aims, there was a long way to go. Progress had been made, but there were many hindrances and only limited substantive evidence that ALE was making a real impact on health, on training people for and in the labour market, and for building up an informed citizenry. This is why it makes sense to link ALE to international efforts to reach the 2030 Agenda deadline, not just in education but in all the 17 areas for which SDGs have been set.

The ALE contention as to why it should be an active and accepted partner in SDG achievement is simple: a key factor in development processes is the changing of minds and of attitudes and the development of capacities. And these are essentially adult education processes: ALE is



vital not only in the obvious areas of literacy, adult basic education, vocational training and citizenship education, but in all the other SDG areas of action. But to link ALE to these areas requires complex intersectoral approaches and the elimination of the barriers that have often inhibited such cooperation in the past.

## **THE BFA, GRALE AND THE SDGS: THE IMPORTANCE OF CROSS-SECTORAL IMPLEMENTATION**

The *Suwon-Osan CONFINTEA VI Mid-Term Review Statement* (UIL, 2018, p. 9) reiterates the importance of intersectorality, urging:

Member States to work intersectorally and increase policy dialogue that includes all stakeholders, including civil society and learners, to create lifelong learning systems and societies.

The importance of intersectoral approaches had already been sounded in the Belém Framework for Action (UIL, 2010*b*), which said that ALE policies and legislation should be ‘based on sector-wide and intersectoral approaches, covering and linking all components of learning and education’, and that governance should include ‘promoting and supporting intersectoral and inter-ministerial cooperation’.

The need for this intersectorality ranges from the macro level – seen in the involvement and contribution of ALE in the achievement of various Sustainable Development Goals – through to intersectoral and inter-ministerial cooperation at the Member State national level, and down to implementation at local levels. The foreword to the third *GRALE* report (UIL, 2016), by Irina Bokova, then Director-General of UNESCO, notes that:

In moving forward, adult learning and education must be built into a holistic, intersectoral approach. This requires a ‘whole-of-government’ approach to education, working across sectors, guided by the urgent need for deeper partnerships. We must continue to inform all sectors of the essential importance of education for success across the board.

Chapter 6 of *GRALE 3* (pp. 133–139) considers how the 2030 Agenda for Sustainable Development might pave the way for greater intersectoral

collaboration on ALE and for a better balance of educational opportunities across all ages with multiple benefits and lasting impact. In particular, barriers to intersectoral coordination will need to be dismantled, and particularly in relation to intersectoral funding – there would need to be financial incentive schemes to promote such intersectoral programmes and interventions.

*GRALE 3* (pp. 135–137) also stresses the need for a rebalancing or reweighting of resource deployment within the educational sector itself: the respective size of the allocations to early childhood education, schooling, technical and vocational training, and ALE. But this is unlikely to happen unless there is intersectoral collaboration and a resultant awareness of the contribution that each of these components bring to each other. Awareness needs to grow ‘that investments directed at adults can bring immense benefits to children’ and that ‘even adults who have received basic education will need continuous learning in order to keep their skills up-to-date’. Attention will also have to be focused on less easy-to-measure non-formal ALE programmes and informal learning (including those using the new technologies).

*GRALE 3* did provide some grounds for optimism. Many countries had reported a strengthening of the understanding of the impact of ALE on other sectors and on society and community in general. The challenge was to translate this awareness into practical inter-ministerial collaboration and co-financing. Recommendations included (p. 149):

Member States should develop integrated policies using interdisciplinary and intersectoral knowledge and expertise, encompassing education and training policies and related policy areas, such as economic development, human resource development, labour, health, environment, justice, agriculture and culture.

To develop adult learning and education policies, Member States should consider:

- a) strengthening or creating interministerial forums to articulate across sectors the roles of adult learning and education in the life-long learning spectrum, as well as its contributions to the development of societies;
- b) involving all relevant stakeholders, including parliamentarians, public authorities, academia, civil society organizations, and the private sector as partners in policy development.

## RALE ON INTERSECTORALITY IN THE THREE TYPES OF ALE

Looking at intersectorality in the three ALE types or sectors delineated in *RALE* (literacy and basic skills; vocational skills, entrepreneurship, continuing education and training and professional development; active citizenship skills developed through community, popular or liberal education), it is clear that everything is, in principle, connected, as is affirmed in the Suwon Statement.

### ALE AND BASIC SKILLS

Intersectoral approaches to literacy are necessary to respond to the diverse needs of learners. Many of these needs are prompted by contextual demands that are not directly educational, such as health and well-being, environmental sustainability, and conflict and post-conflict and disaster situations. Indeed, it is precisely in these varying contexts that the importance of literacy as an indispensable foundation for lifelong learning is to be understood. In other words, it is important to remember that 'literacy is not a standalone set of skills that can be acquired and completed within a short timeframe; rather, it is a component of a set of core competencies that require sustained learning and updating on a continuous basis' and 'literacy and ALE programmes should be linked to non-formal TVET/income-generation training, and TVET should include literacy components. Literacy skills and higher-level skills are increasingly required for decent work, active citizenship and lifelong learning' (UIL, 2018).

Literacy and basic education for adults can help parents engage with what their children are learning at school, with positive effects both for their children and the school system's effectiveness. They can help adults understand health risks and health education advice. As *GRALE 3* puts it (UIL, 2016, p. 136):

ALE programmes may avoid or reduce the need for medication, help prevent patients from wasting or misusing medication and save valuable professional time. They may also allow for a closer match between risks, needs and provision, potentially reducing the use of health services and need for hospitalization as well as expensive residential care for older people.

## ALE AND VOCATIONAL SKILLS, CONTINUING EDUCATION AND TRAINING, AND PROFESSIONAL DEVELOPMENT

Another commitment of the Belém Framework for Action (UIL, 2010*b*) was to ensure access to work-related adult learning for different target groups (which included self-employed workers, workers in the informal economy, and migrant workers) in a range of traditional and non-traditional jobs and sectors.

*GRALE 3* reported on some limited achievements here (e.g. Mali, Estonia, Finland, Hungary), though participation seems to be dominated by men (UIL, 2016, p. 51) and there was little information on the participation of minority groups, migrants and refugees. Chapter 3 of *GRALE 3* provides a very important analysis of the links between ALE and the changing labour market. It notes that 'ALE has a major role to play in helping populations adapt to these changes. Adults need support in acquiring new skills and managing the mental, physical and emotional demands of a new labour market' (p. 88). However, though many research studies have provided positive evidence of the range of benefits that ALE can offer the labour market, these studies have tended to look at easy-to-measure factors (such as the correlation between formal educational qualifications and labour-market outcomes). More conclusive evidence is needed that (pp. 88–89):

ALE can have an impact for individuals, their employers and societies and economies in which they live. ... However, [studies] also show that the benefits should not be expected too quickly, nor should they be taken for granted. The success of ALE programmes often depends on how well they were designed (internal factors), but can also be highly dependent on external factors, such as societal norms and cultural practices. Thus, different types of ALE will have different types of outcome in different contexts. For example, formal qualification-bearing programmes will be particularly important for certain careers in some countries, whereas in others, workplace-based training will be the main source of benefit to both employees and employers.

*GRALE 3* concluded that there was ‘an undeniable business case’ for engaging and investing in ALE. However, getting government, the private sector and funders to recognize and respond to the value of ALE is not that simple, given that positive attitudes to ALE do not necessarily lead to more than minimal investment. Part of the problem may be unrealistic expectations of ALE in terms of rapid and dramatic labour-market outcomes. (The bold estimate in the BFA (p. 9) that ‘for every single year that the average level of education of the adult population is raised, there is a corresponding increase of 3.7 per cent in long-term economic growth and a 6 per cent increase in per capita income’ is clearly not to be understood as being mechanically correlated to the quantum of adult education provided in a society. This is an area where more research and, based on that research, advocacy and information must be provided to all sectors.)

The Suwon Statement again calls for more TVET and continuing ALE (UIL, 2018):

The provision and investment in continuing education, professional development and TVET needs to be increased, and more so through non-formal approaches, to enable educational agents to offer training for livelihoods in informal economies, paying particular attention to women and girls, youth and older persons, migrants and refugees, and to provide credit for self-employment and entrepreneurship.

Beyond work-related skills, it is important to support the development of capabilities such as problem-solving, critical thinking, creativity, the ability to work in a team, and the ability to continue learning and be resilient to rapid change.

Literacy and ALE programmes should be linked to non-formal TVET/income-generation training, and TVET should include literacy components. Literacy skills and higher-level skills are increasingly required for decent work, active citizenship and lifelong learning.

The challenge remains that, though there is often a primary or strong focus on vocational and professional education and training there are few truly integrated approaches to ALE to address development in all its aspects.

## ALE AND ACTIVE CITIZENSHIP SKILLS

There is a very common supposition that there is a resource-scarcity dilemma in choosing between economically useful ALE and ALE that yields benefits to individual citizens, their families and the communities they live in. Historically, adult education has always taken both seriously. Unfortunately, compared with the outcome benefits of vocationally directed ALE, the impact of ALE that promotes individual, cultural and socio-political development is often not susceptible to easy measurement.

The BFA highlighted as its first theme adult learning and democracy. ALE had a key role in 'encouraging active citizenship, strengthening the role of civil society, ensuring gender equality and equity, enhancing the empowerment of women, recognizing cultural diversity (including the use of language, and promoting justice and equality for minorities and indigenous peoples) and a new partnership between state and civil society' society' (UIL, 2010*b*). Member States committed themselves to creating greater community participation and 'encouraging and developing leadership capabilities among the adult population and especially among women, enabling them to participate in institutions of the state, the market and civil society' (UIL, 2010*b*).

Chapter 4 of *GRALE 3* is devoted to looking at the multi-faceted links between ALE and thriving communities, though it acknowledges that little research has been done in this area. However, it states that (p. 108):

Nonetheless, there is compelling evidence to show that ALE in formal, non-formal and informal settings helps individuals acquire greater skills, knowledge and understanding. This, in turn, can have considerable 'spill-over' benefits for their families, their work and their community environments. ALE can have a strong impact on active citizenship, political voice, social cohesion, diversity and tolerance. These factors bring important benefits for social and community life.

The report provides a number of examples that give evidence for positive outcomes of non-vocational courses for psychosocial well-being and resilience, social cohesion, and general social capital and more active participation in social, civic and community activities.

At the beginning of the CONFITEA VI Mid-Term Review, the Civil Society Forum stated that (International Council for Adult Education, 2017):

ALE, in a lifelong, life-wide and life-deep perspective, is crucial to the empowerment for all women and men around the planet. It should be truly transformational, critical, empowering, participative and inclusive so it can support the development and transformation of individuals, communities, societies and economies, according to individual needs. An intersectoral approach is needed which acknowledges the urgent need for recognition and accreditation of increasingly mobile populations.

Much of this wording was taken up into the Suwon Statement itself:

ALE should be truly transformational, critical, empowering, participative and inclusive and address the needs of all citizens, in particular those who participate the least. Opportunities for open dialogue need to be developed.

ALE should ensure the participation of adults in learning, thereby promoting democratic values, peace, and human rights through empowerment and active citizenship. Education for sustainable development and global citizenship should therefore be fostered.

'Popular education' as referred to in *RALE* should be an underlying concept of ALE and inform education policies and practice.

## **IMPLEMENTING THE BELÉM FRAMEWORK FOR ACTION TO REACH THE SUSTAINABLE DEVELOPMENT GOALS**

The Belém Framework for Action did not refer to the Sustainable Development Goals as they had not yet been formulated by the United Nations. However, it did 'recognize the key role of adult learning and education in the achievements of the Millennium Development Goals (MDGs), Education for All (EFA) and the UN agenda for sustainable human, social, economic, cultural and environmental development, including gender equality'. *RALE* was able to respond to the new post-2015

situation and noted ‘the significant role of adult learning and education in the 2030 Agenda for Sustainable Development’.

Of particular importance among the 17 SDGs is SDG 4: ‘Ensure inclusive and quality education for all and promote lifelong learning’ (United Nations, 2016, UNESCO 2017a, b). There is an essential synergy between the strategic and implementation recommendations of the BFA and SDG 4 (as explicated in the Incheon Declaration and Framework for Action). However, the challenge, simply put, is to ensure that ALE is recognized (and given implementation resources) as having a key role in education (and therefore in the achievement of SDG 4) and in the achievement of the other 16 SDGs. It is a challenge because ALE is not always recognized as a significant part of education delivery (even when lifelong learning may be the official state policy) and deserving of the budgetary resources to play that role. Being officially recognized as a necessary part of the variety of development activities is also a struggle (and this where evidence-based impact studies are so important). Historically, adult education has been a force for development, human rights and equality. There is substantial evidence that a key factor in development processes is the changing of minds and of attitudes (conscientization) that is really the forte of adult education.

As UNESCO puts it (2017a, p.7):

Embarking on the path of sustainable development will require a profound transformation of how we think and act. To create a more sustainable world and to engage with sustainability-related issues as described in the SDGs, individuals must become sustainability change-makers. They require the knowledge, skills, values and attitudes that empower them to contribute to sustainable development. Education, therefore, is crucial for the achievement of sustainable development.

Of course, being a player in SDG achievement requires adjustments in practice. ALE becomes merely one of several players, and sometimes a subsidiary one, in an intersectoral multi-ministerial programme. Becoming a significant SDG implementation player will require new policies, programmes and strategies; specifically, ones of intersectoral cooperation.

As already noted, there are five key ALE policy implications of the 2030 Agenda (English, 2017):



- To fulfil the right to education, governments need to provide adults with information and effective access to high-quality learning opportunities.
- To ensure true lifelong learning, governments need to balance education spending along the life course.
- Recognizing the holistic nature of sustainable development, governments need to promote cross-sectoral coordination and budgeting.
- Stronger partnerships are required among all stakeholders.
- ALE needs to be part of the data revolution.

The Suwon Statement takes these implications into account, and its full section on ALE and the SDGs has important propositions. Although it specifically reaffirms a commitment to SDG 4, it sees ALE as crucial for all the SDGs (UIL, 2018):

We recognize that education and lifelong learning are at the heart of the SDGs and fundamental to their achievement. We affirm that ALE has a structural, enabling and pivotal role in promoting the implementation of the entire 2030 Sustainable Development Agenda. The provision and acquisition of knowledge, skills, competencies, attitudes and values in all the fields of education and lifelong learning are key to achieving this agenda and, in particular, SDG 4.

Many factors influence sustainable development, such as rapidly changing social and economic developments and labour markets, growing unemployment, and demographic change characterized by population growth and a high proportion of youth in some countries and ageing populations in others. Large-scale migration, which has a major impact on communities – for those left behind, for those migrating and for receiving communities – also has an effect, as does unbridled urban growth, climate change and other environmental challenges, violent conflicts and shrinking democratic space. Seen through a lifelong learning perspective, which includes the provision of literacy and the language it is taught in, intercultural understanding and skills acquisition has an important role to play in tackling these issues.

ALE as a key component of education and lifelong learning is critical for the achievement of the SDGs. Therefore, putting ALE and lifelong learning into practice remains critical in addressing global education issues and challenges.

The Suwon Statement is also frank about the lack of attention to ALE in the SDGs (and of the need to rectify this):

However, ALE is not sufficiently articulated in the 2030 Agenda for Sustainable Development and is the least supported link in the lifelong learning chain.

Further efforts are needed to raise awareness of the potential of ALE among all relevant stakeholders, i.e. policy-makers, researchers, and practitioners beyond education, particularly in labour, health, community development, agriculture, peace promotion and conflict prevention, social cohesion, defence and military services, internal or homeland security, in ministries and agencies of international cooperation, in faith-based organizations, unions, political parties and the full breadth of civil society.

The statement also urges some specific UNESCO and United Nations actions in this regard:

UNESCO [must] incorporate the BFA and *RALE* within the SDG 4 implementation processes and architecture, such as the SDG-Education 2030 Steering Committee and regional SDG 4 coordination mechanisms, as well as within the wider United Nations structures. They must be used as a reference for voluntary national reviews and high-level political forums on sustainable development, as well as to guide the work of the Global Alliance for Literacy.

For Member States, working with the SDGs is totally congruent with the directions that the BFA, *RALE* and Suwon Statement have indicated. There will need to be a focus on the links between the five key areas of the BFA and five of the targets of SDG 4 and a demonstration of the relevance of each

area to the targets, both in conceptual and practical terms (see *Table 3*). For example, in policy matters, Member States need to work intersectorally and increase policy dialogue that includes all stakeholders, including civil society and learners, to create lifelong learning systems and societies. National and sub-national governments need to restore attention to, and provide adequate funding for, the full ALE agenda to achieve the SDGs.

**Table 3: The links between the five key areas of the BFA and five of the SDG 4 targets**

BFA	SDG 4
Policy	<p><b>Target 4.3:</b> By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university.</p>
Governance	<p><b>Target 4.4:</b> By 2030, sustainably increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.</p>
Financing	<p><b>Target 4.5:</b> By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations.</p>
Participation	<p><b>Target 4.6:</b> By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy.</p>
Quality	<p><b>Target 4.7:</b> By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.</p>

Source: Yulealawati, 2017, p. 2

## IMPLEMENTING ALE LINKAGES WITH THE SDGS

There are two immediate hindrances to ALE and SDG interactivity. The first is that, over decades, certain elements of ALE, such as formal literacy instruction, have often been run as formal, if somewhat unsupported, elements of conventional schooling systems with little connection to other parts of society. The second is almost the reverse: many adult education activities are alive and well within other sectors – health education, rural development, etc. – but are not recognized as being ‘adult education’ and are therefore somewhat cut off from wider developments and transformations in ALE thinking and practice. So breaking out of restricted silos and recognizing the existence of adult education practice in development is a twofold move that will require imagination, information and various degrees of restructuring of institutions, governance, and the training and deployment of adult education practitioners.

Much will first have to be done at the international level, particularly with the support of the UNESCO Institute for Lifelong Learning (UIL), which will have to play a much larger and more assertive role in guiding implementation processes and architecture, explaining to the development field the important conceptions and goals presented in the BFA, *RALE* and the Suwon Statement.

UIL will have to guide this paradigm shift of ALE becoming a key partner in the achievement of the SDGs. If this is to happen, UIL will itself have to be better resourced. Also, in its planning for the 2022 CONFINTEA VII, UIL will perhaps have to more directly focus on ALE’s contribution to the SDGs and whether a strategic alliance with these goals is proving beneficial for the adult learners of the world.

## **CHAPTER 6**

# **MONITORING AND MEASUREMENT OF ALE AT COUNTRY AND GLOBAL LEVEL**

## **INTRODUCTION: ARE THERE QUALITY DATA ON ACHIEVEMENTS?**

We cannot gauge the extent of participation in ALE or the quality of ALE outcomes. without some system of monitoring and evaluation; this requires accurate and up-to-date data that can be analysed and interpreted.

The Belém Framework for Action acknowledged the need for such data and committed signatories to a range of national and international data collection and monitoring and evaluation activities (UIL, 2010b).

## **THE CURRENT MONITORING SITUATION AND ITS INADEQUACY**

There are some existing instruments for monitoring ALE at national and regional levels, such as those used by the OECD, the UNESCO Institute for Statistics (UIS), Eurostat and UIL. But, at best, only partial information is provided on ALE and non-formal education by these instruments and the global coverage is limited, with data uneven or lacking in many regions and countries. Measurement of non-formal learning often looks to formal education for criteria, but appropriate approaches for non-formal learning – and eventually informal learning – are necessary. Thus, currently it is not possible to construct a global pool of comprehensive and accurate profiles of ALE and lifelong learning and their outcomes and impacts (Benavot, 2017).

The diverse, voluntary, complex, non-comparable nature of ALE makes measurement particularly challenging. For instance, the multiple life commitments of adults can undermine full participation in ALE, regardless of the quality of that provision. Because ALE covers so many areas of education and learning, much of it falls outside the authority of education ministries and it is difficult to get multiple ministries to cooperate in monitoring ALE. Governments are also usually reluctant to fund ALE, preferring to invest in the more easily monitored formal education and training. Indeed, Benavot (2017, p. 15) argues that 'the continuing lack of systematic and comparable information on ALE to help drive policy interest, reform and expansion, will effectively marginalize adult learning and education for another generation.'

A set of suitable data categories of ALE that should be monitored were suggested by Benavot (*ibid.*, p. 12); these include::

- Definitions and conceptions of ALE and position within lifelong learning;
- Official ALE regulations, law and policies in place, regardless of provider (for profit and non-profit);
- Overall investment (funding) in ALE by government, private sector, civil society;
- Actual provision of ALE – both formal and non-formal frameworks and programmes;
- Differential access and participation rates in ALE among different youth and adult populations;
- The quality of ALE programmes and especially the background of the educators;
- Completion rates of ALE participants;
- The sustainability of outcomes from ALE programme participation over time and during an individual's life;
- Assessment of impact of ALE on society, economy, polity and environment.

Information should be collected at macro level (global, regional and national patterns and trends), meso level (in urban areas, learning cities, community-based programmes and community learning centres, and in workplaces and employer-sponsored programmes), and at micro level (on individual or household participation in ALE).

This information should be made available in a dynamic, international online Wikipedia-like database showcasing national ALE profiles.

Benavot (*ibid.*, p. 17) concludes that there has never been a more opportune time to advocate for ALE – global trends show adults living longer and demanding lifelong learning, diversifying populations need social integration and solidarity through ALE, climate change and environmental degradation call for improved adult resilience, and growing population displacement requires education, training and skills acquisition. Thus the need for monitoring and evaluation capacity in ALE is urgent.

## RALE ON THE COLLECTION OF DATA

As well as being a normative instrument for the comprehensive and systematic review and further development of quality ALE policies, concepts and practices, *RALE* provides a very valuable template of categories for the collection of data. It also provides detailed guidelines for some of the necessary mechanisms, structures and activities related to standards setting, monitoring, evaluation and research (UNESCO 2016a, Sections 25 to 28). The *RALE* 'template' had a formative influence on the shape of the questionnaires sent out to gather data from Member States for *GRALE 3* (and was also used for the compiling of the five regional reports prepared for the Mid-Term Review).

However, the *RALE* 'template' is still at a very broad level of categories. It is generally acknowledged that information from many Member States on participation and progression in adult education programmes (information, incidentally, that is supposed to be disaggregated by gender and other factors) is weak and inadequate. Similarly, progress on benchmarks in various fields, that provide guidance on whether provision, participation and quality targets have been met, is a very slow process.

## THE ROLE OF GRALE IN MONITORING AND EVALUATION

The first *Global Report on Adult Learning and Education (GRALE)* had been presented to CONFITEA VI in 2009 and was a particularly useful resource in the drafting of the BFA. The two subsequent reports have been equally valuable in analysing progress in ALE and in identifying the challenges to implementation. The production of the *GRALE* reports (and the regional reports) has undoubtedly brought some success to the BFA information gathering commitments.

*GRALE 3*, itself a quality monitoring mechanism, refers to the following five key areas for monitoring quality in the provision of ALE (UIL, 2016, p. 56):

1. Systematic collection of information.
2. Existence of pre-service education and training programmes for ALE teachers and facilitators.
3. Requirement of initial qualifications for teaching in ALE programmes.



4. Existence of continuing, in-service education and training programmes for adult learning teachers and facilitators.
5. Substantial research produced on specialized topics for ALE.

It is not that the *GRALE* reports do not have their limitations. Walters (2017) argues that, though *GRALE* is an evidence-based report, it is the result of a 'light touch' reporting process and there are needs for case studies to back up the Member State self-reporting process, more accurate data from civil society and on popular education, and deeper evaluation of the social impacts of ALE.

## THE ROLE OF THE REGIONAL REPORTS

The Mid-Term Review regional reports of 2017 provide a more fine-grained examination of the data collected from the Member States in a questionnaire survey designed to gather information for *GRALE 3*, supplemented by what other information the countries could provide. The *GRALE 3* survey questionnaire had two sections, one on progress in implementation the BFA and a second on themes relating to health/ well-being, employment and community life. The regional reports, precisely because of their regional focus, could be more specific on the monitoring and evaluation needs of the regions.

All the regional reports had a similar architecture to that of the BFA; that is, they looked at literacy; policy; governance; financing; participation, inclusion and equity; quality; and international cooperation.

These regional reports sought to establish:

- What are the key accomplishments, improved practices, and lessons learned from the monitoring of BFA in each region?
- What were the enabling factors in implementing sector-wide youth and adult education policies and programmes developed from lifelong learning perspective?
- What recommendations and proposed action points could be generated for the future global ALE agenda, with an additional focus on improved advocacy and regional cooperation?

## MONITORING, EVALUATION AND RESEARCH CAPACITY

In these reports to the Mid-Term Review of 2017, all the regions saw the need to improve knowledge management through better data collection, analysis and research. Reliable data were needed to understand participation, the source and destination of ALE funding, quality of provision and learning, and to evaluate the impact of ALE on health, the economy and society.

One has to repeat the observation that this urgent need for improvement has been articulated at international and regional ALE conferences for decades.

The capacity to gather data for monitoring and evaluation (and to know what data to gather) and do the analysis and interpretation and further research requires strengthening ALE institutions and technical support. Standardization of what information is really required is vital. National and regional databases of the necessary information required for planning, monitoring, evaluation and decision-making are needed. Generally, UIL is seen as having a significant role in all this capacity-building.

The potentially enormous impact that digital technology could make on data collection has yet to be fully explored in ALE and capacity-building is required here too.

It has also been recognized that ALE research capacity needs to be revitalized. In many regions, previous adult education research capacity at higher education institutions has been decimated (particularly in Africa). Existing university and regional centres need to be supported and generally enhanced. It is also common for programme and project-funding proposals to be stripped of any research component as it is seen by the funders as a kind of luxury add-on.

The issue of continuity of research is also vital. A common predictable occurrence is the production of a baseline research output, funded by an external donor, which is then not capitalized on because it is not kept up to date or used as the foundation for further, more fine-grained research studies.

## THE ISSUE OF THE MONITORING OF QUALITY

The Suwon Statement affirmed the importance of quality, better data collection, and the monitoring of quality. This quality enhancement needs to be funded. It is generally conceded that monitoring of quality requires more detailed data than the monitoring of things such as participation or certification of achievement. Lack of data inhibits monitoring quality, and it is clear that in many regions both the data collection and the monitoring of quality is weak. For example, in sub-Saharan Africa, only about a third of countries collect data on completion rates; for the remainder, information on quality of outcomes was absent. In Latin America, there has been better monitoring of literacy programmes (71 per cent of countries) than for post-literacy youth and adult learning and education (YALE) (57 per cent). However, there is a lack of a systematic approach to monitoring, evaluation and assessment and, when it is done, it tends to focus on service delivery and not on accountability and impact. In Asia, the diversity of the sector was seen as a difficulty in gathering monitoring data. In Europe, monitoring systems have improved, though here also the diversity of the sector creates problems. It may well be that, given the inevitability of diversity in ALE, new imaginative methods of monitoring are called for.

## THE ISSUE OF IMPACT STUDIES

While ALE authorities in many countries believe that ALE leads to economic benefits, this remains merely a belief – unless and until there is substantiating evidence that can be communicated to important stakeholders. A vague belief that ALE has a benign influence is clearly an inadequate prompter of investment in ALE. More firm evidence is needed to gain higher levels of investment. For example, though many countries in the world see vocational education and training as having a positive impact on productivity and employment, there often is a lack of sufficient facilities to provide such TVET to the graduates of basic education (whether from schools or adult education). Clearly the investment is not there. Would hard research evidence on the benefits of TVET make a difference?

*GRALE 3* devoted many of its pages to an analysis of the impact of ALE on health, the labour market/ employment, and on social, civic and community life. This analysis tried to demonstrate the positive links between ALE and progress in these areas. But *GRALE 3* also noted the

dissonance between countries agreeing that ALE is highly useful, yet not fully supporting it and failing to coordinate its integration into broader development interventions.

It is this dissonance that better impact studies need to resolve.

## MONITORING ALE IN RELATION TO SDG 4 INDICATORS

Closely related to the importance of impact studies is the monitoring of the achievement of the SDG 4 targets and indicators related to youth and adult literacy and technical and vocational skills (United Nations, 2018), namely:

### Target 4.4:

By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.

#### Indicator 4.4.1:

Proportion of youth and adults with information and communications technology (ICT) skills, by type of skill.

### Target 4.6:

By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy.

#### Indicator 4.6.1:

Proportion of population in a given age group achieving at least a fixed level of proficiency in functional (a) literacy and (b) numeracy skills, by sex.

However, the language of these targets is open to different interpretations.

Sigdel (2017) has noted that there is a need to clarify what is meant by 'all youth and a substantial proportion of adults', 'functional', and 'literacy and numeracy'. A key challenge is to develop new literacy and numeracy scales to address a continuum-based understanding of literacy proficiency (rather than a dichotomous 'literate'/ 'illiterate' one) and the literacy and numeracy tasks performed at different moments in the human life cycle. Apropos of this, UIS's Technical Cooperation Group on the Indicators for SDG 4 – Education 2030 and by the Global Alliance to Monitor Learning (GAML) are looking into new ways to define and source the necessary data. Current questions include whether literacy

should be addressed only as reading or also as writing, how to define levels of proficiency, and decisions on how to structure reporting on indicator 4.6.1. Sachs-Israel (2017) argues for the following:

- An agreement on an ‘expanded’ conceptual framework including domains (reading, writing, numeracy) for assessing indicator 4.6.1;
- Proposals for the inclusion of alternate ways of measurement of the identified relevant competencies for indicator 4.6.1;
- Inclusion of methods for monitoring in low- and middle-income countries that take their needs into account;
- A pragmatic strategy to define a minimum or fixed level of proficiency in literacy and numeracy;
- Interim reporting that ensures relevance to all countries.

## SOME CONCLUSIONS ON MONITORING AND MEASUREMENT

The Suwon Statement calls on:

UNESCO, in particular UIS and UIL, to continue to support Member States in building high-quality and sustainable monitoring and assessment systems and ensuring reporting for SDG 4 indicators;

Member States to set up efficient monitoring and measurement mechanisms for adult literacy and ALE.

Lack of accurate and systematically organized data has been a persistent problem in the history of ALE. It has exacerbated the difficulties in obtaining policy and financing support for ALE in an environment increasingly dominated by the need for evidence of good quality outcomes. This situation is now changing.

The work done in providing a set of categories and templates for the collection and analysis of data through the BFA, the *RALE* and the *GRALE* reports is beginning to bear fruit, though it is very much a work in progress and the data currently being collected is often not particularly fine-grained. The new challenge is to adapt and expand this positive development to the analysis of the role of ALE in achieving all 17 SDGs and not just SDG 4.

In this respect, the role of UIL will become increasingly important.

## **CHAPTER 7**

### **CONCLUSIONS: TOWARDS CONFINTEA VII**

The Belém Framework for Action (UIL, 2010b), the 2015 *Recommendation on Adult Learning and Education* (UNESCO, 2016a), and the *Suwon-Osan CONFINTEA VI Mid-Term Review Statement* (UIL, 2018), backed up by the research evidence in the *GRALE* reports, have provided the field of adult education with directions and goals, guidelines and standards for practice.

The conclusion reached at the Mid-Term Review held in Suwon in late 2017 was that, while progress had been made in achieving the BFA aims, there was a way to go, and for very understandable reasons – ideological, practical, financial and programme – much of the future direction of ALE action should be linked to efforts to achieve 2030 Agenda targets.

The final plenary session of the Mid-Term Review reflected on the conference inputs and their implications for country-level implementation as we move towards CONFINTEA VII in the light of SDG 4. Regions and countries need to make the paradigm shift that would transform existing institutional and political patterns and move from concern only with basic literacy to lifelong learning. We need to move away from viewing ALE as a remedial or welfare measure, and instead see it as a tool to foster peace and social cohesion, and to address the complex social challenges of the time. The links between the five key areas of the BFA and the five targets of SDG 4 needed to be articulated strongly and ALE must be reaffirmed as a core element of Education 2030.

The product of the Mid-Term Review, the Suwon Statement, asks Member States to take the necessary steps to implement, fully and urgently, the BFA and *RALE*; it makes a detailed set of ‘way forward’ recommendations related to the BFA’s five areas of action and *RALE*’s fields of learning (UIL, 2018, pp. 6–8).

It also makes the following calls (pp. 8–9):

- All stakeholders should contribute to a global effort to advocate learning at all ages as the key means to achieve sustainable development, and for Member States to work intersectorally and increase policy dialogue that includes all stakeholders, including civil society and learners.
- UNESCO and its specialized institutes, specifically the UNESCO Institute for Statistics (UIS) and UIL, need to take the necessary steps for continued monitoring of the BFA and *RALE* and to produce further *GRALE*s at regular intervals (at least every three years) and for

Member States, supported by UNESCO and its specialized institutes, to ensure appropriate monitoring of organized learning activities in relation to the targets of SDG 4. More specifically, UNESCO, in particular UIS and UIL, are to continue to support Member States in building high-quality and sustainable monitoring and assessment systems and ensuring reporting for SDG 4 indicators (as well as for the efficient monitoring and measurement of adult literacy and ALE in general).

For this to happen many of the lead actions will need to take place at the international level and the UNESCO Institute for Lifelong Learning will have to play a larger and more assertive role in, as the Suwon Statement prescribes, incorporating 'the BFA and *RALE* within the SDG 4 implementation processes and architecture, such as the SDG – Education 2030 Steering Committee and regional SDG 4 coordination mechanisms, as well as within the wider United Nations structures.'

Lastly, of course, there is the question of money. The statement calls on the International Commission on Financing Global Education Opportunity (Education Commission), the Global Partnership for Education, Education Cannot Wait and other development partners, as well as national and sub-national governments, to restore attention to, and provide adequate funding for, the full ALE agenda to achieve SDG 4.

In the foreseeable future, the BFA, *RALE* and the Suwon Statement should be used as a reference for national reviews and high-level political forums on sustainable development, as well as a guide to the work of the Global Alliance for Literacy. But if these documents are to have the impact they deserve, they need to be backed up by guides to implementation and practice, benchmarks and checklists, to support education bureaucrats and ALE practitioners in Member States. More international support will be needed to ensure data are collected and analysed (and *RALE* has effectively provided us with the master template for what needs to be looked at). Monitoring and evaluation mechanisms and systems will have to be upgraded – in fact, in many focus areas they will actually have to be established.

The future shape of CONFINTEA VII will perhaps need to be more directly focused on checking the match between the goals of the preceding decade with actual achievements and evaluating whether the proposed strategic alliance with the Sustainable Development Goals



initiative is proving beneficial for the adult learners of the world. If such an approach is adopted it would require a new look at how the data prepared for CONFITEA VII by the *GRALE* and Member State and regional reports should be framed. It would also require a new look at how, in the conference in 2022, the match between goals and achievement is to be assessed.

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The Sixth International Conference on Adult Education (CONFINTEA VI), held in Brazil in 2009, closed with the adoption of the Belém Framework for Action (BFA), which recorded the commitments of Member States and presented a strategic guide for the global development of adult learning and education. The third *Global Report on Adult Learning and Education (GRALE 3)*, published in 2016, drew on survey data to evaluate progress made by countries in fulfilling the commitments made in Brazil. The CONFINTEA VI Mid-Term Review, held in Suwon, Republic of Korea, in October 2017, took stock of progress made by Member States in the past eight years, looking ahead to *GRALE 4* in 2019 and CONFINTEA VII in 2022. This report summarizes the discussions that animated the Mid-Term Review conference and gives readers a brief survey of the key issues concerning progress against the BFA, across all world regions.