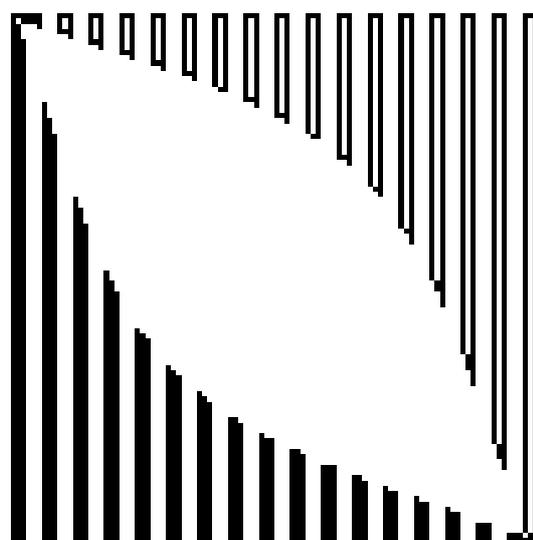


THEMATIC REVIEW ON ADULT LEARNING



SWEDEN

COUNTRY NOTE

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1. INTRODUCTION

1.1 *Objectives and organisation of the thematic review*

When they met in January 1996, OECD Education Ministers argued that far-reaching changes were needed to make lifelong learning for all a reality. “Strategies for lifelong learning need a wholehearted commitment to new system-wide goals, standards and approaches, adapted to the culture and circumstance of each country”. Recognising that adults encountered particular problems in participating in lifelong learning, Ministers called on the OECD to “review and explore new forms of teaching and learning appropriate for adults, whether employed, unemployed or retired”. In October 1997, OECD Labour Ministers amplified the message. They recognised the adverse labour market consequences that arise due to the lack of access to lifelong learning opportunities, and “underlined the importance of ensuring that lifelong learning opportunities are broadly accessible to all persons of working age, in order to sustain and increase their employability”.

In 1998, the OECD and the U.S. Department of Education co-organised an international conference, *How Adults Learn*, to review recent research results and practices with regard to teaching and learning adapted to the needs of adults (OECD and US Department of Education, 1999). One of the conclusions from the conference was that a cross-country thematic review could be a valuable tool for understanding the role of policy and institutional environment in promoting adult learning and drawing policy lessons from different national experiences. In late 1998, the OECD Education Committee launched the Thematic Review on Adult Learning as a joint activity with the Employment, Labour and Social Affairs Committee.

A meeting of national representatives to discuss the terms of reference and indicate interest in participation took place in Paris in June 1999. As a result, ten countries are participating in the Review: Canada, Denmark, Finland, Norway, Portugal, Spain, Sweden, Switzerland, the United Kingdom and the United States. A team of three reviewers, which comprises a rapporteur, from different countries and backgrounds (such as pedagogy, education, economics or social sciences) and two members of the OECD Secretariat visit each country. Each visit lasts about ten days and allows reviewers to capture both education and labour market issues. Each country prepares a Background Report drafted according to guidelines agreed by country representatives and the OECD Secretariat.

The visit enables the reviewers to analyse adult learning in the country on the basis of the Background Report, discussions with representatives of government, administration, employers, trade unions and practitioners, and through site visits. After each visit, the rapporteur, with the help of the review team, prepares a Country Note analysing the main issues concerning adult learning and policy responses in the country under review. The note addresses the four major themes that impinge on participation by adults in learning: Inadequate incentives and motivations for adults to learn; complex pathways between learning settings and a lack of transparency in signalling learning outcomes across a variety of formal and non-formal settings; inappropriate teaching and learning methods; and lack of co-ordination between various public policies that directly or indirectly affect lifelong learning. A final Comparative Report will address the different issues and policy responses in a comparative perspective, including the insights gathered from the participating countries.

1.2 Sweden's participation in the review

The Swedish review visit took place on May 2nd through May 12th, 2000. The members of Steering Group, the authors of the Background Report and the members of the review team can be found in the Annexes 1 and 2 to this document. The review team would like to thank deeply the Pilot Group, the authors of the Background Report and the persons who during the visit were able to give some information on the specificity and the success factors concerning adult learning in Sweden.

1.3 Structure of the paper

The remainder of the report is organised in the following way: Chapter 2 presents and discusses the socio-economic context in which adult education and learning is taking place in Sweden. Chapter 3 outlines the basic characteristics of the adult education and learning "system" in Sweden. The aim is not to repeat what already has been printed in the Background Report prepared by the Swedish Ministry of Education and Science, but to indicate who are the main players and which are the main features of the existing system. In Chapter 4, incentives to adult learning will be discussed. The chapter will address both financial and non-financial factors motivating and enabling adult learning. Chapter 5 will discuss learning modes and methods, elaborating on main tendencies and tensions. Chapter 6 will dwell on the steering and governance of Swedish adult education and learning. Aspects related to horizontal (inter-ministerial and inter-sector) as well as vertical (decentralisation) co-ordination are discussed and exemplified. In Chapter 7 we will discuss questions related to validation of competencies acquired outside formal education. Developments in this field are becoming increasingly important as a way of linking various areas of learning together and are thus critical to a strategy for lifelong learning. Chapter 8 will conclude the report and present some main conclusions regarding challenges faced by Sweden in the field of adult education, training and learning.

2. SOCIO-ECONOMIC CONTEXT OF SWEDISH ADULT EDUCATION AND LEARNING

Swedish approaches to adult education and learning must be understood within the specific social, political and economic context within which they have evolved. Although it is not possible to cover all aspects, this chapter will address some of these contextual issues. We will in particular focus on the role of the Swedish State and how adult education and training has been used as an 'instrument' to respond to the political/economic pressures for change encountered during recent years.

2.1 The role of the state

Sweden has a strong social-democratic tradition stressing social inclusion and equality, underpinned by high levels of taxation and public spending¹. Public sector spending on education is amongst the highest in the world. In 1998, total Swedish expenditure on all types of education was 6.8% of GDP compared with an OECD average of 5.75%. Public funding of education stood at 6.7% in 1998, compared to an OECD total of 4.3%, while private spending in education ranks among the lowest in

1. The extent of government intervention is indicated by the fact that total taxation and public expenditure were about 20 percentage points above the OECD average and 10 to 15 percentage points above the EU average towards the end of the 1990s. (OECD, 1999, p.103) Differences in the computation of the figures account for part of this difference but even after adjustment Sweden has comparatively high levels of welfare benefits and effective taxes. This and other related issues are discussed in OECD Economic Surveys Sweden 1999.

OECD countries (OECD, 2001, Table B2.1a). This makes Sweden among the most generous countries in proportionate terms. 97.3% of funds for educational institutions are provided by public resources, while only 2.7% come from private sources, with an OECD country mean of 13.4%. These figures point towards a dilemma in the way Swedish adult education and learning provisions are organised. While the direct and indirect transfer of resources from public budget education and training is substantial, accompanying organisational measures have not been taken to pursue a more efficient division of labour between public and private providers. Information concerning spending on work-related training is difficult to obtain², and it is our impression that, to a large extent, it operates in a world of itself, rarely systematically linked to the formal and public provisions. The lack of high quality data makes it, however, difficult to draw clear conclusions.

Support of adult education is viewed as an integral part of the social-democratic philosophy. It encourages the accumulation of *social*, as well as *human*, capital and offers opportunities for adults to improve their labour market position. Provision is generous and therefore costly but high spending and taxes are an intrinsic feature of the Swedish approach so leaving the provision of adult training to the private sector is not seen as an option.

There are many different motivations for adult education. For some participants, such education is a consumption *good* offering an interesting way of spending time or deepening knowledge. For others, it is an *investment in human capital* offering the opportunity to improve their labour market position. The dividing line is not precise; someone learning a foreign language for recreational purposes may subsequently find it useful in work, but the distinction does indicate that some forms of adult education are akin to leisure goods.

Since the market provides many leisure goods, why should the State provide, or indeed, subsidise some forms of adult education with no obvious vocational element? The Swedish argument is that these courses have substantial social externalities. They bring together individuals who share ideas and knowledge, thereby encouraging a sense of community and strengthening the democratic process. Indeed, the way that adult education developed has played an important role in determining the form that many political institutions have taken³.

Most governments accept that they should be involved in the provision of vocational training. Even here, it is not clear *a priori* that market solutions are bad. The traditional argument for market failure is that private sector finance is not readily available to pay for investments in training. Financial markets for loans to trainees are poorly developed in most countries although the incentives to develop such markets are limited if the government assumes the dominant role itself. In this instance, the Swedish system makes the costs of study low, certainly lower than many other countries would countenance.

A related issue is the relatively low dispersion in net wages in Sweden implying relatively small increases in wages for trained workers. Some commentators have argued that a high skill economy requires high wages to provide the incentives necessary to induce a high level of training. However, the overall return to training balances the costs of training against the subsequent increment in earnings, so incentives

2. Information from the Ministry of Education and Science, in letter dated 27th of August 2001, estimates the cost for in-service training, financed by the employer, to approximately 8-10 billion SEK. This sum does not include the cost of salaries paid to the employee during training. See also discussion in chapter 3.2 regarding the size of in-company training.

3. This broader social role is best illustrated through the institution of 'Study Circles' (see also Chapter 5.1). For example, a large number of well attended, informal short courses were organised through Study Circles on the implications of joining the European Union. A similar response would be expected when membership of the European Monetary Union becomes a major topical issue

can exist when the increase in earnings is small if the costs are kept sufficiently low. Although social arguments are used to justify the Swedish approach to training and taxation, in this instance the system may merely be replicating the incentive structure elsewhere. We should not also ignore cultural differences as this simple argument does. One aspect of their social consensus is that Swedes value education highly so that incentives to learn do not have to be as strong as elsewhere⁴.

All countries face a trade-off between efficiency and equality that they resolve in different ways. Equality is valued highly in Sweden⁵. The schooling system provides general training to the age of 18, including training that gives immediate access to, for example, skilled manual jobs. Almost all Swedes now stay on in full-time education beyond the minimum school leaving age. The high staying-on rate indicates some considerable success in giving equality of opportunity⁶. The adult education system reinforces this equality of opportunities to adults by also offering the possibility of a second chance to adults who missed it in the first place and giving another route to jobs with higher pay or better conditions of service.

2.2 *Challenges and paradoxes of the knowledge economy*

There has been renewed interest in the provision of adult education in recent years throughout the leading industrialised countries because of changing economic circumstances. As globalisation proceeds, firms are moving production and other facilities to the lowest cost locations. This has typically led to a loss of jobs in manufacturing industry in traditional industrialised areas. Since competition on labour costs is not possible, it is argued that extra jobs can only be generated by moving into high-value added areas, where competition from overseas is less severe. Simultaneously, technical change primarily associated with information and computing technology (ICT) has favoured more skilled labour at the expense of unskilled labour. Upskilling of the labour force has taken place across OECD countries, within industries, across industries, and within jobs, and higher educated labour force has also contributed to an increase in demand for higher education levels of new entrants. Further evidence suggest that in addition to upskilling, there are changing requirements of the skills needed, and there is a growing demand for interpersonal skills or “workplace competencies” that have been associated with the introduction of ICTs and new work practices (OECD, 2001, Chapter 4). These increases in the demand for higher skilled individuals and for different types of skills are themes that underpin the notion of a knowledge economy.

The knowledge economy requires a more highly skilled and flexible workforce than has traditionally been the case in industrial societies. It incorporates the notion of constant change through a deepening and broadening of skills, with more frequent changes of skills associated with lifelong learning.

The demands for increasingly higher levels of formal qualifications can be understood as a reflection of a more intense competition within the labour market. Internationally, many have commented on the inflationary tendencies in this field, resulting in a lowering of the relative value of certificates and diplomas. This tendency forces people to acquire more education and training, pushing the inflationary

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4. In North-American economies several studies have emphasised that a high skill path strategy must be accompanied by high wages and a substantial improvement of labour market conditions to be successful (see Mishel and Teixeira 1991). So far, Sweden has managed to maintain a compressed wage structure and at the same time pursue a high-skills strategy, indicating that the relationship between wage-level and skills-policies vary considerably according to social and political context.
 5. The welfare system has a significant effect on the income distribution reducing, for example, the Gini coefficient from 48.7% before taxes and transfers to 23% afterwards. (OECD, 1999, Table 13. p.112).
 6. There is an argument that the disappearance of employment opportunities played a significant role as well. (See OECD 2000b.)

tendencies even further. Understood in this way, education and training becomes an insurance, reducing the risks for unemployment and increasing working alternatives and conditions. It can be assumed that a society like the Swedish, where the general level of formal education and training is very high, is confronted with this problem, although it is clear that they also provide the Swedish labour force with the flexibility and versatility required for the knowledge economy.

Widespread unemployment in Europe in recent years has stimulated concern about the future of work. The incidence of unemployment was higher amongst low skilled and poorly qualified persons while secure employment appeared to require a higher level of skills. The steep increase of the unemployment rate in Sweden in the 1990s lead to extensive questioning of the Swedish model. Table 1 shows that the rate of unemployment was well over 5 times higher in 1998 than it was in 1990.

Table 1: Unemployment rate

1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
1.8	3.2	5.8	9.5	9.8	9.2	10.0	10.3	8.3	6%	5%

Source: Statistics Sweden

Sweden has a long history of active labour market policies directed at the long-term unemployed. However, the steep increase in unemployment suggested the need for a change in the style, emphasis, and effectiveness of adult education generally. Similarly, of the development of the knowledge economy has called for a general improvement of the educational attainment of the workforce. These changes motivated the major stimulus given by the Adult Education Initiative (see Box 1) and further developments in labour market training programmes. Table 2 shows the expenditure on labour market training in Sweden (relative to GNP) during the period 1990 to 1999. Swedish expenditures double the OECD average.⁷

Table 2: Expenditure on labour market training, relative to GNP

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Sweden	0,53	1,01	1,09	0,76	0,77	0,55	-	0,42	0,46	0,49
OECD average	0,20					0,25			0,22	

Source: OECD database on labour market programs.

A major problem with the notion of the knowledge society is how to translate general statements into detailed policy. What sorts and levels of skills do we require of individuals? How often will these requirements change?

The enormous increase in the use of ICT over, say, the last 10 years, is frequently used as an example of the requirements posed by the new knowledge economy. One should be aware, however, that

7. The OECD-averages are 0,20 in 1990, 0,25 in 1995 and 0,22 in 1998. It is interesting to note that expenditure on labour market training is (relatively speaking) dropping after 1992, when unemployment was at its highest. This drop was compensated by other labour market measures, reaching their peak in 1993, 1994 and 1995, adding up to a total of approximately 5% of GNP.

the strong visibility of ICT might lead to over-emphasis on computing skills. If we accept the need for computing skills, what does this mean in practical terms? What is the minimum level to be met by everybody? Is it to use the Internet, to use a word-processor, to write a program or to install a new component? Should the government support any training or can it be left to the private sector? Although there was no evidence of excess supply, there is a danger that the demand for skills required will be overestimated, indeed the only shortages commonly reported in Sweden were for specialist ICT workers at degree level. An even greater danger is that an overemphasis on IT-based skills will result in an under-estimation of the need for other kinds of skills. Throughout our visit in Sweden, this dilemma appeared again and again in the form of an embrace of the potential provided by new technologies. Very often there was not sufficient reflection on how to utilise these technologies in an optimal way, for example as an element in overall pedagogical approaches targeted to the needs and requirements of adults.

Compared to most other countries, however, Sweden seems to be better placed to face this challenge. Looking into the level of investments in science and technology, Sweden performs extremely well and is far from focusing its investments in Information and Communication technologies only. Some international comparisons indicate that Sweden outperforms almost all industrialised countries in terms of enterprise funded research and development. Table 3 illustrates this.

Table 3: International Comparison of Business enterprise expenditure on research and development by Selected OECD Countries, 1997

Country	BERD/GDP
Sweden	2.8
Japan	2.1
United States	2.0
Germany	1.5
France	1.4
United Kingdom	1.2
Netherlands	1.1
Norway	1.0
Denmark	1.2
Canada	1.0
Italy	0.5

Source: Statistics Canada- Cat. No, 88-202-XIP

Although only indirectly related to adult education and training, the level of investments in research and development by Swedish enterprises indicates that issues related to knowledge and competencies are treated seriously, by the private just as much as by the public sector. Data from the same source as that referred to above indicate that Sweden has increased its industrial research and development effort considerably during the last 10 years⁸.

One final issue that can be included in this section that has been raised by researchers and was also mentioned throughout our visit is the existence of labour shortages in Sweden. This shortage is partly

8. The picture presented in table 2 is supported by other studies as well. 'Science Watch' (1991) ranks Sweden as number 2 (of 17 countries) in terms of quality of national systems for basic research. The ranking is based on the number of citations per scientific paper during the period 1981-1990 and is considered as an important research and development quality indicator.

due to a mismatch between supply and demand of specific types of skills (ICT and social services). Slow growth and an ageing of the population are increasingly considered as a problem (OECD, 2000). A number of training programmes have been focused on raising the skills of the unemployed so as to contribute to reduce shortages as well as to allow foreign workers to enter Sweden. Training programmes have also been set into motion for the integration of migrants to Sweden.

2.3 Preliminary conclusions

Compared to most other countries, Swedish adult education, training and learning is based on a very strong socio-economic basis. We can on the one hand observe a very strong public involvement, in terms of direct and indirect investments in this field. We can furthermore observe a strong involvement by private enterprises, illustrated by the very high level of investment in development and research, which necessarily also involves training. In addition to this, the low dispersion in net wages combined with a high level of taxation means that indirect, individual contributions to education and training are substantial. This strong consensus on the importance of education, training and learning (and the willingness to spend money) does not, however, solve all dilemmas faced by a knowledge economy like Sweden's.

3. ADULT EDUCATION AND LEARNING IN SWEDEN

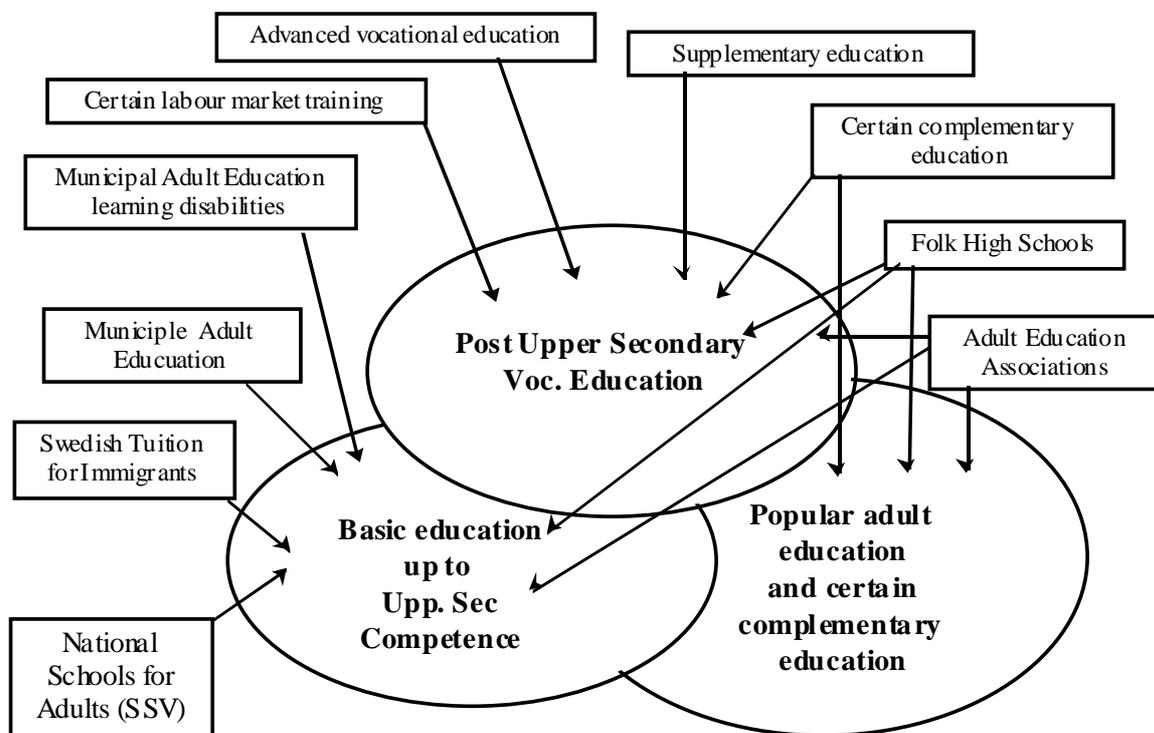
Adult education and learning can be described through five more or less inter-related strands of education, training and learning.

The first strand of adult education provides basic initial education up to the level of upper secondary school, provided by institutions like *Komvux* and *Särvux*. The second strand consists of adult education at university and higher education level, mainly in the form of the recently established Advanced vocational education. The third strand, organised around the Folk High Schools and the adult education associations (Study Circles), is termed Popular adult education (*Folkbildning*). The Ministry of Education and Science controls these three sub-systems. The fourth strand of adult education is linked to labour market policies and governed by the Ministry of Industry. The fifth strand consists of in-company training, focusing on the particular learning needs of working life. While receiving substantial public financing, major contributions are made by working life itself. Our aim is to capture the main features of the system and, if possible, see how the different parts are interrelated and balanced according to each other.

3.1 Public adult education and training

Figure 1 illustrates in some detail how the parts of adult education and training that are organised by the Ministry of Education and Science are linked to each other and which specific institutions belong to each of them. The figure is illustrative by indicating that several of the institutions cover a multiplicity of tasks, somewhat blurring the distinction made above.

Figure 1: Adult education according to levels and functions



The goal of *basic adult education up to the level of upper secondary school* is to provide participants with knowledge and skills needed for working life and for lifelong learning. Given current demands from working life, this level of requirement can be regarded as corresponding to regular upper secondary schooling⁹. Basic education is today provided through municipal adult education (KomVux), adult education for those with learning disabilities (*Særvux*), Swedish tuition for immigrants (Sfi), national schools for adults (SSV) as well as part of the activities of Folk High Schools and adult education associations. It is the intention of the Government that opportunities for education corresponding to regular upper secondary schooling will be provided to all adults, who either completely or partially lack upper secondary education.

Post secondary vocational education covers those forms of education, which in practice presuppose completion of upper secondary education and are directed towards a specific vocational area or aim at satisfying specific labour market needs. Post secondary vocational education for adults exists today mainly in the form of Advanced Vocational Education (KY), in municipal adult education as well as

9. There are two relevant levels of schooling for young people. If successful, young men and women achieve 'compulsory' schooling level by the age of 16 and 'upper secondary' level by the age of 19. Upper secondary education has academic and vocational streams although there are common core modules such as Swedish, English and mathematics in each stream.

supplementary education and labour market training. What is of particular interest is the dual approach introduced, using a combination of education in school and training in enterprises. In addition to this we can see a tendency towards increased involvement of traditional universities in developing and providing education specifically tailored to adult needs. This is not only related to vocational oriented courses, but there seems to be an interest among higher education institutions to pursue the needs (and the market opportunities) offered by adults. An interesting example of this is the co-operation and networking between a group of universities in the area of *Bergslagen*¹⁰ to develop courses in this field.

The main objective of *popular adult education*, represented by Folk High Schools and adult education associations (Study Circles), is not to provide formal qualifications for a specific occupation (See Box 3). Popular education, however, fulfils an important function in the Swedish society, not least, as the official slogan states, to ‘safeguard and develop democracy and active citizenship’. Popular education complements the ordinary system by providing courses and learning opportunities where there normally would be nothing available. In areas of handicrafts and arts this is clearly the case. Popular adult education and complementary education cover a broad range of subjects, ranging from specific techniques in a traditional handicraft to courses aiming at general personal development. During recent years popular education has been given increased responsibilities in other areas and the link to general adult education and labour market training has thus been strengthened.

While partly being provided through institutions located in the three areas referred to above, *Labour market training* should be looked upon as a separate strand of adult education and training. This is due to the fact that this form of training is governed according to separate objectives set by the Ministry of Industry (through the National Labour Market Board and the recently privatised Labour Market Training Agency). As is shown in Table 4, the volume of training is - relative to other adult education measures - high. Compared to the mid-nineties, when unemployment was at its highest, the volume of labour market training has been reduced and activities refocused (see also Chapters 5, 6 and 7).

Table 4 illustrates the number of students and participants in some of the institutions mentioned above. It also indicates the number of females attending.

Table 4: Participants^(a) in adult education according to institutions and gender. (1998)

	Number of participants during a week, autumn 1998	Proportion of females % 1998
Adult Education Associations	2 815 679 (1)	57
Folk high school (191 290 according to FBR)	104 530 (2)	60
Municipal Adult Education	237 510 (3)	68
Municipal education for adults with learning disabilities	4 137 (4)	44
Swedish Tuition for Immigrants (Sfi)	20 460 (3)	61
SSV	11 862 (4)	66
Labour market training	41 899 (5)	46
University colleges and Universities (undergraduate education)	305 581 (4)	58

Notes: a) Participation is measured in different ways. A student is a person that participates in an educational process. Participant refers to those who participate in a course at any time. A student may be counted several times depending on the number of courses he or she participates in. 1) Participants in 1998. 2) Autumn 1998, participation in courses with state grants. 3) Autumn 1998, number of students. 4) Academic year 1998/99, number of students. 5) 1998, average number of students.
Source: Statistics Sweden Annual yearbook 1998 (SCB)

10. Örebro, Dalarna, Mälardalen and Gävle.

The institutions described above work within a framework of legal rights and obligations. *Basic municipal adult education* is a right for all municipal inhabitants resident in Sweden from the second half of the year in which they become 20. Each municipality is obliged to provide such education to all inhabitants who need and desire it, either within their own municipality or through inter-municipal payment to the municipality arranging the education when the home municipality is not able to provide equivalent education. As regards upper secondary adult education and supplementary education, the same right does not exist, but under the School Act there is a provision that “municipalities should endeavour to provide upper secondary education and supplementary education, commensurate with individual demands and needs”.

The policy making and administrative apparatus operating these four strands of adult education and training consists of a number of players at different levels, the most important being the Ministry of Education and Science and the closely inter-linked national Agency for Education (*Skolverket*). These two are responsible for overall co-ordination (general objectives and budgets, curricula and policies for reform and experimentation). The Ministry of Industry has, since the 1960ies and the 1970ies become increasingly involved in matters of adult education through the provision of labour marked training. As indicated above, parts of this training is closely interrelated to the institutions and provisions administered by the Ministry of Education, but we can also see a tendency to develop specifically tailored and independent labour market training (more linked to working life). The social partners, trade union and Employers federation has considerable influence, both formally and informally, on the development and the co-ordination of the system. The role of the local level, in particular the municipalities, seems to be increasing. Since the beginning of the 1980s, decentralisation has been an important guiding principle for Swedish educational policies. Practical organisation and follow up of basic adult education has largely been transferred to the municipalities. Decentralisation is even more apparent in popular education where the Swedish National Council of Adult Education, the 11 study associations and each single institution enjoy a considerable autonomy, not least in terms of content and pedagogy.

The current system, as outlined above, has during recent years been extended through a number of experimental programmes and schemes. The Adult Education Initiative (*Kunskapslyftet*) is the most important of these, covering the period 1997-2002 (see Box 1). This is a large scheme, annually funding 90 000 places through the municipalities and 10 000 through the Folk High Schools. It was introduced against a background of high unemployment and the need to raise educational standards in general and for specific groups at risk. Part of its objective was to change the nature of adult education. Courses were to be more demand-led reflecting the needs of its clients. Involvement of new private-sector institutions was emphasised and supported. Improved co-ordination of adult education and learning at local level has been a main objective. The Swedish IT-programme is a second scheme initiated by the Ministry of Industry and the labour market authorities to respond to the task of skilled IT personnel in Swedish working life. More than 10 000 people were selected and trained in the period 1998-2000. This scheme is an example of a *targeted* and *tailored* adult education initiative where the co-ordination with and direct involvement of private enterprises is radically strengthened.

Box 1: The Adult Education Initiative (*Kunskapslyftet*)

The Adult Education Initiative is a five-year programme, started on the 1st of July 1997. The aim was to develop a more comprehensive national approach to adult education and learning and to offer adults in need the possibility to improve their education based on their individual demands. The programme has been financed by the state but managed and run by the municipalities. An annual contribution of 3 billion SEK has been invested in the programme (345 million Euro). This is the largest and most focused spending ever in Sweden on Adult education and training and corresponds to 100 000 full time study places annually. Apart from the size of the programme, the perhaps most interesting feature of the Initiative is the autonomy of the municipalities in terms of defining an appropriate local profile. Reflecting the aim of decentralisation of education and training policies, the Adult Education Initiative is targeting a broad range of potential users, both at individual and organisation level. One important objective has been to co-ordinate existing resources better. Even though different municipalities have found different solutions, the initiative has from the start emphasised the importance of linking schools and enterprises closer together.

3.2 *In-company and work-related adult education, training and learning*

While the four strands of Swedish adult education presented above are impressive in terms of scope and size, in-company training and learning (in-service, enterprise based training) is an important additional strand to be considered. However, it is difficult to estimate its importance since available information on adult education in Sweden is very much focused on public provisions¹¹. This can in part be explained through the methodological difficulties in getting an overview of work-related, in-company training. This 'blind spot' in the information points towards a certain bias in the way adult education and learning is being promoted. This bias can on the one hand be understood as an underestimation (on the part of public authorities and representatives of the educational institutions) of the potential of working-life in terms of systematic learning. It can on the other hand be understood as an underestimation of the potential synergy-effects of linking public and private provisions more closely together. If correct, this could be considered as a major weakness of Swedish adult education and learning.

It must be underlined, however, that the public and the private systems for provision of adult education and learning fulfil different roles. A strengthening of the links between these systems should not imply a merger into one model. Schools and enterprises have different strengths, a closer link could give an opportunity to combine these strengths and at the same time avoid some of the inherent weaknesses in school as well as work-based learning. The discussion should therefore focus on the balancing of the two approaches, not the merging together.

In-service training is regulated in Sweden both by legislation and agreements between the labour market partners. In the 1970s and 80s a number of laws were introduced which gave employees the right to leave of absence from work for studies and to participate in education during paid working hours. In-service training in Sweden has wide coverage. During the course of a year nearly half of all employees take part in some form of in-service training. Education per employee is relatively short amounting on average to between 5 to 7 days per year. Statistics Sweden has estimated that in-company training accounts to some 200 000 full-time study places each year (based on labour force surveys 1998, 1999).

During recent years, and following the Swedish membership of the European Union, a substantial part of in-service training and competence development has been partially financed by EU Structural Funds (objective 4). Up to 1999, a total of SEK 5 billion had been released, based on a co-financing between the EU (25%), the Swedish State (25%) and the enterprises (50%). Approximately a quarter of a million employees in approximately 30 000 companies have in some form or another received training within this framework. Education measures can also be financed under other Structural Fund objectives. The rapid expansion of private education companies has been one of the side effects of this new form of financing. These companies may bring in a new form of dynamic into the adult education and learning field, not least through the constant pressure of competition and the need to tailor courses. It is our impression, however, that the majority of these new providers are more involved with various public activities rather than private enterprises as such. A reduction of public funding could thus prove critical for these new companies. It should also be noted that private providers are encouraged (for example in the Adult Education Initiative and through labour market training) in order to achieve a greater variety in pedagogy and methodologies. Furthermore, the government bill Adult Learning and the Development of Adult Education (prop. 2000/01:72) also emphasises the importance of access to a variety of providers.

Structured courses, organised by the enterprise itself or by external course-providers, clearly form an important part of Swedish adult education and learning. Perhaps even more important than this is the informal learning taking place during ordinary work. As in other OECD countries, the outcomes of this learning have largely been overlooked, making it difficult to see how this reservoir of knowledge and

11. Sweden is not unusual in this respect.

competence can be utilised and linked to formalised and structured training provided by the enterprise itself or by the public system. The awareness of this hidden learning has been growing during recent years. As elsewhere, experimentation has been initiated to see how a national system for assessment and recognition of prior informal/non-formal learning can be developed. These developments, pointing towards a closer interrelationship between public and private players, may open up a development where *adult education* gradually transforms into a broader *adult learning* approach. Such a transformation is closely linked to the tension between a model where instruction and teaching is emphasised on the one hand and models where a better balance between instruction and autonomous learning has been achieved. Some insist that this transformation is necessary if lifelong learning is to become a reality.

3.3 *Preliminary conclusions*

As the description has showed, we do not talk of a clear ‘system’ of adult education, training and learning in Sweden. We are rather talking about more or less clearly defined sub-systems fulfilling different roles and functions that provides adults in Sweden broad possibilities for learning. Pursuing different roles and functions does not mean, however, that these sub-systems can, or indeed should, operate in isolation from each other. An important objective of the Adult Education Initiative has been to promote a better co-operation and division of labour between actors at the local level. This is not only important from a ‘top-down’ point of view where the most efficient use of existing resources must be a priority, but also from a ‘bottom-up’ point of view where transparent as well as coherent provisions are crucial, for individuals as well as enterprises.

4. HOW TO IMPROVE INCENTIVES TO LEARNING?¹²

This chapter will address questions related to *incentives to learning*. While economic incentives are crucial for adult learning, a number of other factors may influence, motivate and enable adults to enter education and training. The interaction between different forms of incentives, economic and non-economic, is important for their overall effect.

The Swedish system has several attractive features. These include (i) free adult education at upper secondary level for suitably qualified individuals, (ii) good financial support for students, (iii) courses that are readily available to many individuals and (iv) a variety of providers with different approaches to the delivery of education. Put together, these provide ample opportunities and financial incentives to study. Of course, many more subtle barriers may remain such as a basic lack of information but the series of commissions on aspects of adult education such as counselling indicate strong official support for improvements to the system.

Most forms of formal adult education are provided free of cost and informal education is heavily subsidised. A mixture of grants and loans is available for study as an adult at compulsory and upper secondary level. Special adult study support (*svux*) is directed at people with a satisfactory employment record (or its equivalent). It offers a grant that could rise to 65% of unemployment benefit¹³ and the chance to borrow a further amount. Special education grants (UBS) are associated with the Adult Education Initiative. They are available to people who are eligible for unemployment benefit and give a grant equal to

12. This chapter is related to theme 1 in the OECD-terms of references, ‘How can government, social partners and others improve the incentives and motivation for adults to learn?’ It should be noted that one of the questions raised under theme 1, related to assessment and recognition of non-formal learning, is treated in chapter 7.

13. Unemployment benefit is 80% of salary subject to a maximum of SEK 16,000 per month.

the individual's unemployment benefit. Other grants and loans are available for disabled people and for study in post-secondary education.

Although there is no legal right to upper secondary education, as it is for primary education, access to such education is in practise excellent. There are several special schemes for particular groups who traditionally have lower levels of education or experience difficulties in the labour market. The unemployed have been a target group for labour market training for many years and are also a priority group for the Adult Education Initiative. Special programmes are directed at immigrants and persons with functional impediments. Women appear to use adult education more readily than men, and some schemes are beginning to consider how to encourage more participation amongst poorly qualified males.

It can be assumed that these economic incentives contributed substantially to a high degree of participation in adult education and training. The high level becomes apparent when compared to the 19 other countries that participated in International Adult Literacy Survey (IALS); well over half of the adult population in the Swedish sample participated in adult education or training during the preceding year compared with an average across all countries of 35%. The higher rates of participation occurred at all levels of literacy, but the Swedish advantage was most pronounced at lower literacy levels. As a proportion, over twice as many Swedes as the average participated at the lowest level of literacy while the proportion of Swedes at the highest level was only slightly above the country average. This is illustrated in table 3, where the situation in Sweden is compared to the country average, according to skill levels 1-5.

Table 5: Per cent of population aged 16-65 participating in adult education and training during the preceding year

IALS Literacy level	Level 1	Level 2	Level 3	Level 4/5	Total
Sweden	29.3	40.1	54.5	61.6	52.5
Country Average	14.2	28.7	45.7	59.2	35.0

Source: OECD, 2000. Table 3.12 Annex D p.153

There is some evidence that the more educated take greater advantage of the opportunities presented. Thus 37% of those taking basic education courses in the *Komvux* in 1998-99 had an education level below upper secondary education¹⁴. Only 20% of those studying for upper secondary education had such qualifications but this is in part because many students at *Komvux* are already in higher education and are making up for their academic deficiencies.

Table 6: Enrolment by highest level of attainment, percent below ISCED Level 3

	1995-96	1998-99
<i>Komvux</i> : basic education	39	37
<i>Komvux</i> : upper secondary education	17	20
Folk High Schools: longer courses	42	
Entrants to labour market training	23	

Note: *Komvux* data are for October 1995. Folk High School data are for courses of 15 or more weeks during the academic year 1995/1996. Labour Market Training data are for 1/08/1995-31/12/1996 (1998-99 statistics Sweden).

Source: 1995-96 Figures OECD (1998) Fig.2.10-2.16.

14. The interpretation of these figures is complicated because many of the students with upper secondary competence may be immigrants obtaining competence in Swedish language and culture.

Unfortunately, there is no readily available information on the participation rate in adult education amongst less educated individuals. So we do not know, for example, what proportion of individuals without compulsory schooling are attending or have attended some form of adult education.

Beyond the general positive dispositions towards motivating adults to learn in Sweden, there are a number of specific features that have the potential to act as incentives for adults to resume learning. There are first of all, a broad range of programmes that range from core basic adult education and vocationally oriented diverse programmes to more leisure oriented study circles (these are reviewed in Chapter 4). But, as a consequence of the political will to improve the situation, other incentives have developed or are in process of being analysed and implemented. These range from the existence of a specific legal framework that allows employees to temporarily leave work to receive education, to the validation of non formal or informal competencies or the establishment of individual learning accounts. Sweden has shown its commitment to improving incentives for adults to learn in more flexible ways.

4.1 *Legal right to leave*

One interesting feature of the Swedish system is the legal right to leave for employees wanting to take education or training. This may be used as one of the main examples of non-economic incentives, providing people with the necessary time to attain education and training. This “right to leave” was introduced already in the mid 1970s but is surprisingly little used and known. The OECD team was informed that less than 1 % of the working population used this possibility on an annual basis. It was also indicated, from the Employers federation, that a certain “stigma” is associated to this arrangement; applying for educational leave will in many cases be read as a sign of “exit” from the enterprise. In a setting of lifelong learning, where individuals will be expected to move from work to education and back again more frequently than what is the case today, there is obviously a good reason to look into a revival and revitalisation of this “old” arrangement. An opportunity to do so has presented itself in the form of current plans to introduce a scheme for *individual competence accounts* at national level.

4.2 *Individual competence accounts*

Individual competence accounts imply a system where individual savings for education and training triggers or releases a (proportionate) additional funding from the employer and/or from public authorities. Individuals who withdraw funds from their competence accounts and undergo approved competence development are entitled to a ‘competence premium’. This premium can either take the form of a reduction in taxes or a state subsidy. Because participation of employers in a competence account system has been considered very important, the government has proposed a reduction of 10 per cent in payroll taxes of the amount that an employer contributes to an employee’s account. Experiments in the private sector have demonstrated that this can be an efficient way to motivate employees to further education and training. A commission was set up by the Ministry of Industry in 2000 to analyse the development of a full-sized national system, covering the whole population. The idea has been positively received by the Swedish Parliament and the social partners. The approach has been embraced by public as well as private players in the field and is clearly expected to have considerable potential. Although a final decision has yet to be taken, implementation is expected to begin in the next few years.

Box 2: Skandia individual learning accounts

Skandia, a major Swedish (and international) insurance and banking consortium, has pioneered the introduction of individual competence accounts. A system has been set up where the enterprise ‘matches’ the savings of the employee (normally 5% of the salary). 7 years of shared savings will be sufficient to finance approximately 6 months of full time education and training. The enterprise states that the purpose of the system is to make it possible to alternate between work and training, to build a basis for continuous updating and to motivate employees.

As was underlined by the Head of the Commission responsible for the development of the system, the challenge is to introduce this system on a national basis. Although the idea has been discussed in many countries during recent years, no other country has introduced it as an integrated part of their overall national adult education and training structure. A number of critical questions arise when considering the future role of individual learning accounts.

Firstly, will individuals be allowed to use their savings as they want, or will they be directed towards education and training defined as “relevant” by the co-financing organisation, be it the public authorities or participating enterprises? It is interesting to note that Skandia have decided to leave the choice of education and training exclusively to the employees. As it was emphasised by the representatives of Skandia, future qualification and competence-requirements are hard to predict and employees will in many cases be better placed to judge their own training needs than, for example, a human resource manager. Furthermore, the representatives of Skandia argued leaving the choice to the individual is important in terms of motivation. Even in a case where the individual’s choice of education and training is of little relevance to the enterprise, the motivational incentive could be of high value.

Secondly, how will such a national system be linked to taxation? If competence-related savings are taxed in the same way as ordinary savings, the overall effect will be reduced. This illustrates that a broadening of adult education and training policies inevitably raises questions relevant to a number of policy-areas.

Thirdly, and perhaps most important, is whether the current right to leave is a sufficient basis for the new system. If the representatives of the Employers confederation are right, that a certain stigma is attached to taking leave for educational purposes, will it be possible to change this following a general introduction of learning accounts? A financing scheme working without or in isolation from flexible systems for leave and work-organisation will face problems.

As have been demonstrated in other OECD countries, and most notably in the Netherlands, flexible working arrangements can be designed and implemented in a number of ways. While the Swedish right to leave is conceived as a periodical leave (ranging from a few weeks to one or more years), the Dutch arrangements are more directed to part-time work, allowing individuals to combine working and learning to a greater extent.

If we assume that the new competence accounts will lead to an increased demand for education and training, will enterprises and training providers be willing and able to develop practises where people can move from training to work and back again? Furthermore, how vulnerable will such a system be for general changes in profitability, unemployment and weak conjunctures? A question is also whether some enterprises and branches will be better prepared than others to utilise this system, leaving other parts of the system behind. Of particular interest will be the ability of small and medium-sized enterprises to allow their employees to fully use the system. While representing a major part of the Swedish economy, they are generally presented as less ready to support and utilise education and training. Another, and important concern is the ability of lower qualified workers to make use of the system. In most OECD countries lower skilled people are less apt to take further education and training. Even if this tendency is less pronounced in

the Swedish case, it could still be reinforced through a national competence account system relying on individual motivation and responsibility.

4.3 *Validation: assessment and recognition of competencies*¹⁵

Adult learning is not an activity limited to formal education and training institutions. Learning at work, during leisure-time activities and in the family are increasingly being recognised as important elements in the overall reproduction and renewal of competencies. Due to the fact that non-formal learning may be difficult to detect, in some cases learning which has not been planned or not even acknowledged by the learner him/herself, high priority has been given to the development of methodologies for the identification and assessment of learning taking place outside the classroom.

As has been demonstrated in other countries, the introduction of methodologies and systems for validation of non-formal learning can have an important motivational effect. Many individuals will conceive credit for prior learning as an incentive to further learning. First of all by avoiding unnecessary repetitions, secondly by demonstrating that learning can take place along different pathways, and not only through traditional, formal schooling.

Swedish initiatives to develop methodologies and systems for identification and assessment of non-formal learning have, until recently, been few. These initiatives have been more related to specific groups (immigrants, disabled, unemployed), than to the general public. The project 'immigrants as a resource,' initiated in 1988, developed a testing programme for immigrants with vocational qualifications. This scheme (PTVI) was divided into practical and theoretical parts, taking between two to 12 weeks to complete. After testing, the candidate received a written description of equivalent Swedish education and training requirements. Until 1992, the national labour market board was responsible for organising vocational tests for all the unemployed that wished to be tested. Since then this service has been decentralised to the local employment offices resulting in a sharp decline in testing. Nowadays, the local offices are forced to choose when and to what extent testing should be carried out. The reasons for the decline are complex but the costs and the complexity of the testing itself are mentioned as possible explanations.

Recognising the problems caused by this situation, the Swedish Ministry of Education and Science initiated in 1998 an investigation on how to assess and recognise 'foreign' qualifications. Following this investigation, a number of recommendations were forwarded (SOU 1998:165), pointing to the need for clarifying responsibilities at national and regional levels. It was suggested that upper secondary school curricula (*Gymnasieskolans styrdokument för yrkesutbildning*) should be used as benchmarks, defining the appropriate requirements and levels to be met by candidates. No prior, formal schooling or certification is to be required from the candidates, anybody claiming to have appropriate experiences should be given the opportunity to have his or her competencies assessed. Not limited to the

15. Issues of validation are covered under several of the OECD themes for the Thematic Review. Under theme 1 the following questions are asked: How well developed are systems for assessing and measuring learning outcomes? What are the means for verifying skills, competences and knowledge that have been acquired outside formal learning settings? To what extent and under what conditions are informally acquired skills, competences and knowledge recognised in the collective bargaining process? What are the barriers to their wider adoption of systems for assessing and recognising acquired learning outcomes? Under theme 2, the following questions are asked: How are outcomes from different learning settings assessed and recognised? To what extent are outcomes from one setting (e.g. university continuing education) signalled in a language that has currency in another setting (e.g. the workplace), and vice versa? Is the lack of recognition a serious obstacle to lifelong learning?

issue of 'foreign' qualifications, the report suggests in its final chapter that a system for assessment and recognition of prior and non-formal learning should be open to all adults and not just immigrants. One of the major trade union confederations (*Tjänstmännens Centralorganisation/TCO*) responded by issuing their own report (TCO: 1999) wherein they stated that Sweden needs a general system for assessment and recognition of non-formal learning. The ministerial approach referred to above is, however, judged as unsatisfactory and too narrow. TCO suggests initiating a tripartite effort towards a Swedish system for assessment and recognition of non-formal learning, using experiences and best practices from neighbouring Nordic countries as well as from the EU in general.

A Commissioner, appointed by the government in 1999, was asked to implement and evaluate three pilot projects during 2000 and propose organizational arrangements for a broader pilot scheme¹⁶. The Commissioner also has to consider the possibility of establishing a national validation system in Sweden. The work of the Commissioner is being carried out in consultation with the social partners, the National Agency for Education, the National Labour Market Board, the National Immigration Office, the Council on Adult Education and with various professional associations and local authorities.

So far, the main purpose of the methodologies being tested in various regions is to increase the flexibility of upper secondary school. Both at central and regional levels it is frequently repeated that the purpose of the activity is to save time and resources. Adults should not have to repeat learning sequences; schools should not waste resources on teaching adults what they already know. The strong link to upper secondary school is both a strength and a weakness. As illustrated by the experimental project in the municipality of Gothenburg, the direct link to *Gymnasieskolan* makes it possible to build on already established approaches to assessment (only teachers take part in the assessment itself), thus covering a large number of candidates during a relatively short period of time. The fact that the Swedish vocational education and training system is highly modularised has played a positive role. According to those involved in the project, no major problems have yet been encountered in the application of the formal 'standards' to candidates who have acquired competencies through non-formal learning. The weakness may lie in too close a relation to the school. If non-formally acquired competencies are supposed to be similar to those developed in formal education and training, there is a certain risk that important competencies are defined as irrelevant. The challenge is to develop an assessment approach where equivalence rather than similarity is supported, thus accepting the fact that formal and non-formal learning are different and may have different, though equally valuable outcomes.

Swedish approaches to assessment and recognition of non-formal learning are not limited to these centrally initiated projects and experiments. We see a number of other assessment approaches initiated by public as well as private players. These initiatives are more focused on work-related competencies and only marginally linked to formal education and training. The Swedish IT programme (SWIT) can, as already mentioned, be looked upon as an interesting example of high volume assessment of prior and non-formal competencies. The high number of applicants, more than 80 000, emphasised the need for a high capacity assessment and selection methodology. The purpose of the methodology was to identify persons capable of completing the training in question as well as to identify persons suitable for the various IT functions. Eventually, a methodology, based on a combination of interviews and highly formalised tests (individual numerical/logical/language skills as well as social/relational skills) was used. The formal tests were given to establish a basis for more personalised interviews aimed at the final selection of candidates.

Without going into further detail on the specific testing involved and methodologies applied, SWIT illustrates that it is possible to introduce high-capacity systems for assessment with a reasonably high level of success. It should be noted, however, that the SWIT assessment was tailored to the specific needs of Swedish IT enterprises and developed in close co-operation with them. Unlike many of the

16. The Commission on validation of adults' knowledge and competence (U1999:06).

national approaches discussed in this report, SWIT was able to work according to a rather limited set of criteria and to a reference point established by working life.

Identification of prior and non-formal learning is indirectly demonstrated by the local and regional initiatives in the Adult Education Initiative (*Kunskapslyftet*). In the region of Gothenburg, efforts to co-ordinate guidance and counselling resources have led to the introduction of systematic mapping of an adult's experiences and abilities. While not leading to any formal recognition, the process of identifying more or less hidden competencies is seen as crucial for counselling. Teams consisting of teachers, psychologists and other professionals, work together with the candidate to set up a tailored study plan (see also 6.1). This illustrates that the link between guidance/counselling and assessment is not always easy to make and underlines the formative role of assessments.

Compared to a number of other European countries, Sweden has just recently started work on the development of general systems for assessment of competencies that have been acquired outside formal learning settings. The initiative from the government together with the involvement of social partners has led to increased attention on this issue. But while the social partners seem to be more concerned about the utilisation of competencies developed in working life (how can it be used, developed, accumulated and disseminated), the interest of the government seems to be more focused on the need to make public educational institutions more flexible (to open the system up for immigrants, for adults with long working experience, to reduce costs etc.). While not entirely contradicting each other, these motivations reflect somewhat different ambitions. And while the social partners seem to strive for a more balanced valuation of formal and non-formal learning, the government initiatives use the formal, school-based qualification as the standard according to which other competencies should be measured and valued. A fact that might change this situation is that the social partners are actively working together with the ongoing commission on validation (validating adults' knowledge and competence). Due to the early stage of developments it is fair to say that competencies and knowledge acquired outside the formal education and training play a relatively modest role in the collective bargaining process. This does not mean that non-formally acquired competencies play no role in the setting of wages and distribution of positions, rather that these are aspects being considered in individual cases, not as parts of the collective bargaining processes at national or sectoral level. The future role of non-formal learning in the Swedish approach to lifelong learning has not been clearly defined. If outcomes from different learning settings are to be assessed and recognised according to a common reference point, a common value standard, this can clearly not be based exclusively on the input from the school. Future developments in this field require that this is changed and that broader involvement in the setting of competence standards is secured.

4.4 Preliminary conclusions

Sweden has a number of incentives that contribute to motivating adults to study that range from cultural to economic motivations. There are strong direct financial incentives, different access points into education, a broad range of programmes available for adults, from informal and more leisure oriented programmes to more vocationally directed labour market programmes. The possibility to obtain financial assistance exists, and it is further strengthened by the existence of the legal right to educational leave. With such strong incentives, Sweden ranks high in terms of adult participation in different types of learning according to different indicators such as the IALS comparison or the adult share of formal education by level (OECD, 2001, Chapter 2, Figure 2.5.). Even under this positive situation vis-à-vis other OECD countries, Sweden continues to make efforts to improve adult education and to fill the current gaps. However, there are still some potential problems in terms of motivation. One is the low proportion of males in learning, who need to be motivated to enter back to learning. Yet another issue is that of immigrants' education. Furthermore, there is even a risk of over-provision of adult education in Sweden. Critics state that it has resulted in a proportion of the working-age population being tied up in labour

market programmes and adult education, and remaining outside of the labour market concurrently with a fall in unemployment and only recent labour force participation increase.

The (expected) introduction of Individual Competence Accounts is positive in the sense that it will enable individuals to tailor their education, training and learning careers in a better and more flexible way than today. This requires, however, that flexibility of working conditions is considered. The success of competence accounts depends on ability of individuals to alternate between education, training and work, requiring an overall consideration of problems as well as possibilities in this field. This will require a close co-operation between public and private sectors where legal and institutional conditions for a lifelong learning strategy are considered. In terms of validation, the future role of non-formal learning in the Swedish approach to lifelong learning has not been clearly defined. If outcomes from different learning settings are to be assessed and recognised according to a common reference point, a common value standard, this can clearly not be based exclusively on the input from the school. So far, the involvement of the social partners in the practical development of methodologies for identification, assessment and recognition of non-formal learning has been weak. Future developments in this field require that this is changed and that broader involvement in the setting of competence standards is secured.

5. IMPROVING THE QUALITY, PEDAGOGY AND VARIETY OF LEARNING; MODES AND METHODS IN SWEDISH ADULT EDUCATION AND LEARNING¹⁷

The fundamental objective of Swedish adult education and learning, its *raison d'être*, is to promote and enable development of knowledge and competencies, not only at individual level, but in enterprises, in public institutions and in society at large.

The total input of resources, the incentives given to individuals along with the steering and governance of these factors will influence whether this basic objective is reached or not. Equally important, however, is the way learning is promoted and facilitated, how the learning process itself is organised. This is commonly treated as a pedagogical question, how to organise formal teaching and training in the best possible way. While this is an important aspect, it needs to be supplemented by a focus on how different learning areas, inside and outside formal education and training institutions can be organised and mobilised in the best possible way.

This sub-chapter will elaborate on different modes and methods of adult learning in the Swedish context. Renewing adult education, it is commonly stated, requires that we are able to find the correct balance between teaching and instruction on the one hand and autonomous learning on the other hand. The main concern is to reform adult education so that individual motivation is improved through more relevant curricula and methods of teaching and learning that reflect individual interests and career aspirations. Many of the initiatives launched during recent years can be understood within this dichotomy, as a debate on how to reform and supplement the dominating general adult education so as to better be able to meet the specific needs of individuals, enterprises and local communities. But another factor has been the limited and somewhat rigid public supply of adult education in previous years, which we heard about during our visit. The Adult Education initiative, the new Advanced Vocational Education, the efforts to develop local learning centres, the Swedish IT programme, the *Vaggeryd* model for labour market training and a number of other initiatives points towards a different and more flexible and varied way of organising adult learning. It also reflects the high degree of experimentation that the Swedish are willing to pursue to find solutions and effective practices. All of them place more emphasis on autonomous learning than traditional teaching and instruction. The term 'flexible learning' has become one of the important 'catchwords' in the

17. This chapter links to theme 3 in the OECD terms of reference, 'Improving the quality, pedagogy and variety of learning.'

debate on Swedish adult education and learning. This points towards a model where learning is organised according to the needs of the individual, not least by offering more flexible solutions to where and when learning takes place (through distance education and IT-supported learning). While still being a system heavily oriented towards a 'school- and instruction' based model, recent developments may indicate a turning point in the way adult education and learning is approached in Sweden. The recent government bill Adult Learning and the Development of Adult Education (prop. 2000/01:72) states that it is essential to cater to everyone on the basis of individual needs and calls for mainstreaming the work of renewal and development undertaken in connection with the AEI. Before analysing these recent examples, it is worthwhile dwelling on approaches existing for a long time already, notably the Folk High Schools and the Study Circles.

5.1 Popular education: learning rather than teaching

Popular education (*Folkbildning*) dates back to the mid 19th century and has been an important part of the Swedish society since then. What is interesting is that this part of adult education has been able to survive and renew itself during the years. In numerical terms, both Folk High Schools and Study Circles have increased their activities during recent years.

In the case of the Folk High Schools this renewal is partly a consequence of their role in labour market training and the Adult Education Initiative (10 000 new places annually were financed through this programme). The survival and renewal of the Folk High Schools can not, however, be fully explained through the input of additional financial resources from central level. Their strength seems also to lie in their ability to offer an alternative to the traditional institutions, not least in terms of pedagogical methods and the way learning processes are organised. Folk High Schools are autonomous in the sense that the owner of the school (ranging from Christian movements to political organisations) can define basic objectives. This autonomy makes it possible to organise teaching and learning in a more flexible way than is the case in traditional institutions. The Folk High Schools offer short courses and long courses that normally last for two semesters. The profile of the school will reflect the types of courses it offers.

There are two main categories of long courses. The first category includes courses defined by the owner of the school. Covering a broad range of subjects, these courses will normally not be linked to any official, national curriculum and ordinary exams are not required. The emphasis on personal development is important and much attention is given to the setting up of a learning environment where students participate actively in the learning process. The second category of long courses includes those linked to the national curricula (mainly in upper secondary school) that require exams. While addressing the same objective as *Komvux*, Folk High Schools are generally better positioned and equipped to tailor these courses to the individual needs of the participants. The ability to learn in a way which suits the student her/himself seems to be an important factor motivating people to choose Folk High Schools (as an example).

The third category of courses organised by the Folk High Schools are the short courses, normally initiated in close co-operation with the local community or the region where the Folk High School is located. If we compare the Swedish Folk High Schools to those in the neighbouring countries Denmark and Norway, the main difference seems to be related to this specific category of courses. The Swedish institutions have been more successful in developing short courses, and through this co-operation with local enterprises and organisations. An important consequence of this is that the average age of participants in Swedish folk high school courses is higher than in Norway and Denmark. Folk High Schools can in this way be looked upon as some sort of 'learning hub' where general (curriculum regulated) adult education interacts with short and long courses developed on an autonomous basis. Looking back on the history of the Folk High Schools, they have been an important part of the Swedish society. While somewhat reduced

and changed, their role is still important, both in terms of providing an alternative pedagogical approach and by facilitating and promoting the link between formal education and the society.

Even though the Folk High Schools to a considerable degree have been able to renew the concept, not least through the extensive input of resources during recent years, the relationship between the different types of courses creates dilemmas and tensions for the schools. As it was said by one of the representatives of the Folk High Schools:

'We have grown bigger, but this might in the long run be contradictory to our basic objectives. A revolution to integrate 10 000 new places. Think it was a success that we managed to do it, but it will have consequences for our overall profile...'

This is an important statement as it indirectly dwells on the 'added value' of Folk High Schools. Folk High Schools are important to Swedish adult education and training because they provide alternative learning settings and learning forms, adjusted to the needs of the particular individual. However, it requires a careful balancing of public policies in this area and a willingness to find a balance between integration into formal education and training on the one hand and autonomy, independence on the other hand.

The Study Circles, organised through and initiated by a total of 11 national study associations (covering a broad range of interests, ranging from religious organisations via arts and handicrafts to political parties), represents an impressive amount of initiative and activity (See Box 1, Sweden Background Report, 2000). As already indicated, Statistics Sweden has calculated that Study Circle activity in Sweden amounts to approximately 40 000 full time study places. In the year 2000, 2.8 million participants took part in courses arranged by these associations. More than the volume of the courses, the Swedish study-circle activity provides us with important lessons on how to organise learning.

A Study Circle will ideally build on the following four principles. First of all, it will be based on some sort of self-organised learning. The quality of the learning requires that each participant work on their own to prepare their contributions to the work of the circle. Second, a Study Circle will be based on co-operative learning. The work in the group is essential to the quality of the learning and the ability of the circle, together with the teacher/instructor, to work, as a team is essential to the outcome. Third, and closely linked to the two previous points, a high degree of responsibility is required by each participant. Lack of individual and collective responsibility will normally be a major reason for failure. Fourth, a genuine common interest in the subject treated is shared by the participants. The interest in this common subject has motivated them to attend. All these elements can be captured in the open characteristic to the study circles. Circles will be based on the interests of the participants, free from the constraint of formalised curricula. This gives them greater flexibility, not least reflected by the fact that aesthetic (such as art and handicraft) subjects form an important part of the study circle activity. In this sense we can say that the circles provide an important supplement to ordinary formalised adult education, covering learning needs not met elsewhere.

In terms of pedagogical principles we can say that Study Circles represent an interesting alternative to traditional teaching and instruction based models. And while the model can not be transferred fully into all parts of adult education, at least some of the elements should be considered. This is supported by the fact that concepts like co-operative, self-managed and autonomous learning have become important reference points in the discussions on how to organise work-based learning.

Box 3: Study circles

During 2000, a total of 2.8 million Swedes participated in Study Circles. Forming an important part of what is referred to as Popular education (*Folkbildning*), Study Circles offer a wide variety of courses reflecting the ideologies and aims of the 11 different Study Associations responsible for developing and organising the actual courses. These associations consist of as different groups as the Swedish Farmer's Union, The Centre and Liberal parties, the nonconformist Churches of Sweden, the Professional Employees, the Swedish Sport Confederation, the Labour Movement and the YMCA/YWCA. While financed by the state, and to a lesser degree by participant's fees, the Associations are free to choose profile and aims of the courses. It is required, however, that courses are open to everybody. Associations are not allowed to give exclusive rights to their own members.

5.2 The local learning centre

In the European Commission Memorandum on Lifelong learning presented October 2000, one of the six key-messages addresses the importance of developing local learning centres (bringing learning closer to home). According to the Memorandum this can be done in several different ways; by linking together existing institutions, by establishing new centres and, not least, by utilising the new opportunities offered by Information and Communication Technologies (ICT) to tailor learning to the individual and local needs. Sweden offers several interesting examples of how this can actually be done. The OECD team visited one of these centres, *Masugnen* (the blast furnace), and we will base our discussion on this particular case.

Masugnen is governed according to an objective saying that it should be 'a place in the municipality to learn, supported by modern information technologies and new methods for learning'. The idea is to 'refine' flexible learning, not least by developing locally adopted approaches to distance learning. The centre was started by people with previous experience in developing and selling courses to labour market training. This experience, together with financial assistance and opportunities provided by the Adult Education Initiative, can be looked upon as the context within which the centre has been created. The following activities/functions are included in the centre:

- Courses for unemployed
- Consulting for enterprises
- Distance education and training for enterprises
- Individual tailored studies based on distance methods
- IT resource centre Datortek

While covering a broad range of activities, the role as course-provider is the most important. Representatives of the centre emphasised their aim to develop and provide individual training unrestrained by time and place of learning. It was admitted that the content of the studies is less flexible, and to a large degree controlled by the co-operating external institutions (for example universities). One of the major strengths of the local learning centre, as exemplified by *Masugnen*, is their ability to establish a meeting place for adult learning in the local community. Talking to some of the students in the Guided Individual Studies (*Handledda studier*) organised by *Masugnen*, the combination of ICT-supported learning (making it possible to study at home) with the possibility to attend a local learning environment to meet and talk to other students and teachers, was presented as the most important quality of the course.

The case of *Masugnen* illustrated the importance of balancing different learning methodologies. While there is no doubt that ICT-based learning has a great potential in terms of flexibility, this should not lead to an underestimation of the role of physical and social learning environments. As illustrated in our discussion of the Study Circles and their qualities, the social and communicative aspects of learning are

important. While these qualities partly can be developed through media like the Internet and video-conferencing, students themselves tend to underline the importance of actually meeting face to face. Local learning centres can potentially fulfil both these roles; provide flexible distance learning and a physical meeting place for learning.

Box 4: The local learning centre

Masugnen (the Blast Furnace) is a learning centre established in the Municipality of *Lindesberg* to serve local and regional education, training and learning needs. The municipality, with a current population of 23 000, has traditionally been dependent on mining and metalworking. These industries have gradually been replaced with a broad variety of small and medium sized industry and service enterprises as well as by a substantial amount of public sector institutions. This new situation has created a need for flexible and varied provision of adult education and training, frequently targeting specific needs in the local economy. The centre has been designed according to the objective of flexible learning: individuals and enterprises should be able combine the services of the centre with their daily activities. An individual employee wanting to study a certain subject should be able to do this without having to leave his or her job. An enterprise should, in the same manner, be able to pursue staff updating and training without major disruptions in ordinary activities. The centre underlines the importance of IT-supported learning for achieving these flexibility gains. Another important aim of the centre is to mobilise local knowledge and competence resources. While on the one hand saving costs, using local resources is a way of establishing and strengthening local learning-networks. So far, *Masugnen* is one of the few centres of this kind established in Sweden. The model is interesting as it illustrates the potential of local learning centres, as well as the problems facing them.

5.3 Linking education and work -- Advanced vocational education

We have described the Swedish 'system' as heavily school-based, using the examples of upper secondary school and *Komvux*. The dual-system model developed in many other countries based on an integration of education in schools and training in enterprises, does not play an important role in Swedish education. This has changed somewhat through the development (since 1996, 12 000 places) of a new form of education, the Advanced Vocational Education. The experiences have been so positive that the programme was prolonged and now constitutes a permanent part of the public education system.

Advanced Vocational Education is located above upper secondary school and resembles to a certain degree what in Germany is termed *Fachhochschulen*. There are a broad range of providers such as universities, university colleges, municipalities and private companies. Exemplified by *Miljöcentrum* in Gothenburg, a typical year of study will consist of as much as 27 weeks of practise in an enterprise or some other relevant institution. Work-place learning is to a large extent project based, giving the student the possibility to work in teams. Instructors/teachers consist of a mixture of professional teachers and people with direct, professional experience from the field in question. An average student is approximate 27 years of age and has at least 4 years of occupational experience to build on. Three out of four students who finished their education during the year 2000 passed their examination and 74% knew they would be employed within 3 months of their exams.

Talking to teachers as well as students, the feed back to the OECD team was very positive. This education seems to have met a need not fulfilled earlier by any part of the Swedish system. The link to working life is appreciated as a major strength, not only allowing for learning in 'real life', but also as a form of personal networking, making the transfer from school to work easier. The example of Advanced Vocational Education is interesting as it shows that it is possible, in a practical and pedagogical way, to link education and work closer together than what has been the case so far. Advanced Vocational education is, however, not the only example of efforts towards a closer linking adult education and work in Sweden.

5.4 *Targeting skills-mismatches -- SWIT*

Already discussed in previous chapters, the Swedish IT-programme (SWIT) was initiated to meet urgent labour shortages in the field of Information Technologies. The Ministry of Industry put a total of 875 million SEK into a 2-year programme. The management of the programme was based on close co-operation between labour market authorities and various branches of industry, both at national and local level. Detailed profiles of competence-needs were gathered from different branches, leading to the development of detailed job and training profiles.

A non-profit association with a relatively small management was set up to manage the process. A total of 80 000 individuals applied for training within the scheme, out of which approximately 11 000 were selected and eventually trained. The programme was organised according to an objective saying that 80% should be employed within 6 weeks after having completed training. More than 600 different training modules were developed to cope with the demands. Courses lasted for 20 weeks, to a large extent based on distance and interactive learning combined with a number of 2-days group-sessions. Results are impressive: 90% of participants completed the course and out of these 99% passed the final exam. The employment objective (80%) was almost reached¹⁸.

As in the case of Advanced Vocational Education, this is an example a strong involvement of working life in adult education, training and learning. In terms of identifying competence needs and recruiting motivated participants, SWIT must be described as a success. Programmes like SWIT can not replace ordinary, permanent education and training. But as a model aimed at meeting particular competence-shortages in the labour market, the approach seems to be interesting and may be relevant outside Sweden. Compared to the labour market training pursued during the nineties, the efficiency of tailored approaches like SWIT is clearly better. The SWIT-approach can to a certain degree be described as 'cherry-picking' among the best qualified from those unemployed. A counter argument against this, applicable to SWIT, is that helping this 'top-group' into employment will release time and resources for those worse off. It could also be argued, from the enterprise point of view, that such targeted programmes are instrumental to meet skills-mismatches which can not be solved by single enterprises or branches.

5.5 *Targeting local needs -- Vaggeryd*

The *Vaggeryd* model for labour market training (named after the municipality where it was originally developed) can be described as 'modular work place training', varying according to the design of each course. Rotation in local enterprises is basic to the model and each scheme has from 2 to 5 enterprises participating. As in the case of SWIT, the model requires a careful analysis of skills needs in enterprises, in this case limited to enterprises in the municipality. Different from SWIT, the *Vaggeryd* model addresses the category of unemployed encountering the biggest problems (long term unemployed, immigrants).

The strength of the programme lies in the diversity of learning-environments experienced by the participants. Instead of having one or two instructors, as is the case in traditional, school based learning, the participant will have to relate to a much higher number of instructors in a variety of contexts. As it is admitted that this can be both a strength and a weakness, tutors responsible for the trainee are appointed in each company.

18. It fell short of its target by about 100.

The strength of the model is that designs training courses according to particular skills needs at local level. For the participants this is clearly a positive thing, they will be trained in areas where there is a demand for labour.

The networking effect of the scheme is also substantial, linking participants to potential employers. The model might, however, be looked upon as somewhat narrow. No link to the formal education system has been established and there will be a limited possibility to use this training as a basis to build on. The general impression, however, is that the model is filling a vacuum so far not met by the traditional system. In this way it is a supplement, some elements (using the local working life as an arena for learning) can clearly be utilised more generally in the Swedish system. The model has received substantial attention in several Swedish municipalities and is currently being applied in parts of the municipality of Stockholm.

5.6 *Flexible learning -- an appropriate guiding principle?*

Even though the Swedish adult education and learning can be described as complex and partly fragmented 'system', the demand for *flexibility of learning forms* was expressed by all players, irrespective of sector or system. The proposal from the Swedish government on 'Adult learning' provides the following preliminary 'definition' of flexibility of learning.

'Flexible learning implies that it should be possible (for the individual) to choose the time and location for learning.'

This 'definition' introduces two central concepts, *time for learning* and *place of learning*. Formulated in another way, flexibility of learning could then be judged according to *when we learn* and *where we learn*. This dichotomy points towards a number of different learning models, illustrating that time and place are indeed important variables in a model for flexible learning. We might actually use it to identify some of the main learning approaches currently present in the Swedish mode.

- Same time, same location: The traditional way of formal education and training where a group of learners receive teaching within a predefined time and at a specific location. The traditional Komvux model illustrates this well.
- Same time, different location: The use of video-conferencing makes it possible to teach geographically scattered groups of individuals. Some of the courses organised by Masugnen illustrate this.
- Different time, same location: The establishment of local learning centres makes it easier for individuals to tailor learning activities according to their own time schedules, not only according to the time schedules of schools and teachers. Both the experiments in Gothenburg and the example provided by Masugnen illustrate this.
- Different time, different location: This would be the totally individualised learning career where each individual personalises his/her own learning career, without following predefined pathways. Various web-based solutions can also serve as illustrations of this.

The discussions on flexible learning, as reflected in concepts like 'distance education', 'e-learning', 'local learning centres' and 'lifelong learning', tend frequently to be based on variations over the aspects of time and location, when and where we learn. While much attention is given to the possibilities offered by the new technologies, basic questions like 'what makes e-learning work' are less frequently asked and at best treated in a very general way. The difficulties involved in going from the mere transfer of information to actual development of knowledge and competencies seem frequently to be underestimated.

Standing alone, the criteria of when and where are insufficient. A more complete understanding of flexible learning implies that the questions of *how to learn* and *what to learn* are properly addressed. While many (implicitly) tend to assume that advanced instruments (ICT in particular) lead to high quality learning, this is obviously not automatically the case. Sometimes we are blinded by the potential of the new information technologies, failing to see that processing information is only a first, although important step on the way towards knowledge and competencies.

The question of 'how to learn' implies that we consider pedagogical experiences from a wide range of settings; from formal schooling as well as from the workplace, from training enterprises as well as from distance education, from e-learning approaches as well as from Study Circles. Using the various examples discussed previously, there's little doubt that an enormous amount of experience on various approaches to adult education exists in Sweden. The link between these experiences and the new ICT-supported learning technologies has not, however, been pursued in a very systematic way.

The question of 'what to learn' is, obviously, crucial when considering the issue of flexible learning and requires a discussion of concepts like 'learning to learn', basic skills, social skills, key qualifications, key competencies, generic skills, problem solving capability'. All these concepts point towards the dilemma of setting precise learning targets in a situation of rapid and unpredictable change. All these 'catchwords' point towards challenges where ICT-supported learning can be supportive, but cannot carry the burden alone.

These general considerations are highly relevant in the Swedish context. The tension between a belief in the potential of ICT-supported learning on the one hand and the immense challenges related to the promotion of 'learning to learn' on the other hand, was frequently felt to be very strong during various visits and discussions. We are convinced that this reflects a general problem, how to organise flexible learning where not only where and when are considered, but also how and what. It seems that the new government bill Adult Learning and the Development of Adult Education (prop. 2000/01:72) has somewhat targeted these concerns. It stresses the need for future adult education to take the route of providing the individual with the capability of learning to learn and regarding ICT as a tool for learning together with personal meetings between students and staff.

5.7 *Training of trainers and research; the lack of a systematic focus on adult learning*

Discussions so far have illustrated that increased attention is given to adult learning and that numerous new approaches have been developed, not least building on a combination of theoretical and practical education and training. Adult education and training, practitioners in the field commonly assert, requires other approaches and methodologies than those applied in initial education and training. Adults will generally be able to draw on a much larger stock of experiences and successful learning. Teachers and trainers must be able to develop and adapt instruction-material in a way which reflects the needs of the students, not least because books etc. have been developed for children or youngsters. The role will furthermore require a careful balancing of instructions and the facilitation of autonomous learning, alone or in a group.

The challenges facing teachers and trainers in adult education and training are substantial. So far, these have not been reflected in the education of teachers and the training of trainers¹⁹. Sweden has one

19. This might change in the coming period. According to the the Ministry of Education and Science a new teacher education/training has been introduced from fall 2001. One of the cornerstones in this initiative, it is stated, is to emphasise research on learning. Another recent action (2001) is to give the high number of unauthorized teachers (4000) the possibility to take part in training aiming at authorization.

teacher-education institution that offers a specialised course for teachers in adult education (with 10 places available a year). This is clearly insufficient to cover the growing needs for pedagogical competencies in this field. A successful development of adult education and learning depends on a long-term development where not only institutional development and methodological experimentation is supported, as in the cases discussed previously, but where the crucial function of teachers and trainers is appreciated and promoted.

The weak attention given to adult pedagogy and the competencies of teachers and trainers finds its parallel in the field of research on methodologies and approaches to adult training and learning. Until now, this has been an area given low priority²⁰. The evaluation-projects conducted within the framework of (for example) the Adult Education Initiative contribute to a certain degree to development of knowledge in this field. Evaluations can not, however, replace systematic, autonomous and long-term research on these issues. This is even more the case in a situation where lifelong learning is being contemplated and where the linking of various areas of learning increasingly is becoming necessary.

5.8 Preliminary conclusions

The examples presented in this chapter illustrate that Swedish adult education and training is moving towards an increasingly diversified approach in terms of learning modes and methods. An important feature is the tendency to develop education and training models where schools and work places are linked closer together, illustrated through Advanced Vocational Education and the SWIT-programme. These different approaches reveal the willingness to experiment and find effective programmes and learning methods for adults. It also shows the opening up of a rigid provision of adult education to a broader provision.

In terms of educational methods directed towards adults, the emphasis on flexible learning, basically opening up for initiatives where the individual to a larger extent than before can choose time and place for learning is equally important. While an important objective, a too narrow focus on the when and where of learning can be dangerous. The questions of how and what to learn are equally important.

The discussion on diversity and flexibility of learning modes and methods points towards the issue of quality of teaching, training and learning. Quality assurance was a topic only marginally and mostly indirectly touched upon during the visit of the OECD team to Sweden. It is our impression that locally based quality assurance rather than centrally initiated quality control (inspection) is pursued. Quality issues and strategies can thus not be separated from the issues of local and institutional autonomy, but are promoted as an integral part of the strive for decentralisation. The experiences from the Adult Education Initiative are positive in this sense, showing that the local level, given the right conditions, is willing and able to pursue quality development and assurance. The overall success will depend on the balance between local and central level (see Chapter 6), not least the interrelation between goals formulated at central level and the room these leave for local governance.

20. The OECD terms of reference addresses this issue explicitly in theme 4, 'Improving policy coherence and effectiveness'. It is indirectly treated in theme 2, 'An integrated approach to provision of, and participation in, adult learning.'

6. POLICY COHERENCE AND EFFECTIVENESS; STEERING AND GOVERNANCE OF SWEDISH ADULT EDUCATION AND LEARNING²¹

Much of the discussion on Swedish adult education policies has focused on the tension between centralised and decentralised forms of governance. There's also an increasing attention towards the danger of fragmentation, how to avoid that a more and more specialised structure leads to inefficiency, duplication of work and provisions organised according to contradictory objectives

This chapter will address these questions of steering and governance. In addition to treating main lines of division, we will also discuss the increasing use evaluations and whether this contributes to a more optimal division of labour and use of resources.

6.1 *Decentralisation of steering and governance*

The strengthening of local autonomy has been an important part of Swedish education and training since the early 1980s (see Lindensjö and Lundgren, 1987). This emphasis on decentralisation of decisions and responsibilities reflects a growing attention towards the limits of centrally located bureaucracy and its ability to identify and respond to needs at local level.

Decentralisation is also a principle pursued within adult education and training. To a certain degree we can say that popular education (Folk High Schools and Study Circles) always has operated according to a principle of decentralisation. A certain autonomy in the choice of subjects and teaching/learning methodologies has been fundamental. The other parts of adult education, notably *Komvux*, have enjoyed a less autonomous position. Even though the responsibility of providing this education has been a municipal responsibility for a long time, the room for local adaptation of content and pedagogy has been relatively limited.

This rigidity has increasingly been perceived as a problem, and the need to develop general adult education into a more efficient competence-development "tool" at local level lay behind the Adult Education Initiative started in 1997 and scheduled to be finished by 2002. The programme is described as the largest ever run in Sweden so far (approximate 800 000 persons are expected to have participated in some form or another when it is concluded in 2002) and main responsibility for implementation was given to the municipalities.

It seems clear that the Adult Education Initiative has increased experimentation and involvement at the local level, not limited to the technical allocation of resources. An important effect of the programme is that a number of municipalities have taken initiatives to bridge different systems of provision. While we still can observe "walls" between sub-systems at central level (see section 5.2), some local authorities have concluded that these walls are counter-productive to an efficient use of resources at local level. The urge of municipalities to tear down walls seems to be based on the analysis of local needs conducted at the start of the programme. Local needs, it was discovered, do not necessarily follow the dividing lines of the existing institutional infrastructure, but will frequently require solutions where elements of the different systems are combined.

The experimentation in the municipality of Gothenburg is a good example of the innovative role potentially to be played by local authorities. Stimulated by the start up of the Adult Education Initiative,

21 . The OECD terms of reference address this issue explicitly in theme 4, 'Improving policy coherence and effectiveness'. It is indirectly treated in theme 2 'An integrated approach to provision of, and participation in, adult learning.

the municipality decided to develop an entirely new organisational framework for adult education and training. The starting point was that this framework should be better suited to address individual needs. It was assumed that this strategy would have the additional effect of a better overall utilisation of available resources, financial and human. The new framework not only includes those strands of public adult education and training previously described (Chapter 2), but includes a variety of guidance and information services, link to social services and, not least, a stronger link to working life.

While the opportunity to enter into wide-ranging reforms was provided by the AEI, the local initiative (from the local Adult Education Board) was designed to respond to a situation with high unemployment and (in some townships) a high percentage of immigrants with limited knowledge of Swedish (but in many cases with a high level of education from their native countries). The systematic co-ordination of diverse bodies seems to have resulted in more efficient and user-focused service. This has not been done through the establishment of new and heavy institutions, a lighter network-based model has been applied. This makes it possible to overview existing resources (in terms of money and knowledge) and link them to the needs and expectations expressed by the users. Such a model requires that providers are able to communicate with individual and institutional users in an efficient way. It also presupposes that the individual users are made aware of what is on offer and what is relevant to their specific situation. An important element introduced in the model was thus the reorganisation of guidance and counselling services.

A new guidance/counselling centre was established as a part of the overall framework from the beginning and aimed at linking together all counselling resources related to adult learning. Also here a “networking” solution has been developed where educational guidance, labour market counselling and social service counselling are linked together. Confronting the services involved with a totally new challenge of cross-sectoral counselling, a substantial amount of time has been used for gradual testing of the approach. The services offered vary considerably according to individual needs. In some cases assistance to the individual is given in the form of traditional study and career plans, in other cases “deeper” counselling will be offered, sometimes involving psychologists and teachers. Methodologies for identification and assessment of prior learning have been introduced; although still at an experimental basis (see also section 4.3). The strength of the model lies in the fact that it addresses both low and high achievers.

The example of Gothenburg is interesting as it presents us with a model for steering/co-ordination of adult learning at local level. The strong emphasis on individual counselling and learning needs leads, when taken seriously, to a “flexible” and ‘holistic’ provision based on the co-ordination of services. The example of Gothenburg illustrates that Swedish adult education and learning is “rich” in the sense that the amount of financial and human resources put into the system very high. The same applies to the diversity of resources, the number of functions fulfilled at local level is impressive. In general, the problem seems to be to link these resources together in a more efficient way and reorient them according to the needs articulated by individuals rather than by the system itself.

Gothenburg is not alone to experiment in this field. Existing evaluations indicate that most municipalities have entered into some form of organisational change in this field. From the individual point of view, and also from the perspective of the enterprises, this is a positive development. Many of these experiments can be looked upon as “best-practises”, of high relevance also outside Sweden.

The Adult Education Initiative confirms the potential for innovation that exists at the local level. This potential can not, however, be released without a clear division of work with the central level. For the local level to succeed with individually tailored solutions based on the broad local co-operation, the distinctions between programmes at national level have to be reduced and made easier to cross.

6.2 *Specialisation or fragmentation?*

One of the representatives of the Swedish Ministry of Education and Science summarised what he saw as main challenges in the time to come:

We have a lot of resources, but in different systems. The challenge is therefore not so much to increase the amount of resources as it is to develop an infrastructure and a legislation which makes it possible to use the resources in the best way. Today there are too many walls, we need an infrastructure for lifelong learning.

These “walls” are best illustrated through the dividing line drawn between the activities of the Ministry of Education and Science on the one hand and those of the Ministry of Industry on the other hand. This division of labour between general adult education and labour market training is consequential, as these two sub-systems seem to develop according to somewhat different objectives. A certain division of labour market and specialisation is of course necessary. The main question is however; does the current approach lead to a fragmented delivery of services at individual and local level, or is it more a question of offering a positive diversity of learning opportunities meeting a broad spectrum of needs?

The Ministry of Education and Science, in its recent proposal to the Parliament (2000/2001:72, ‘The learning of adults’), discusses how the existing elements of general adult education can be co-ordinated in such a way that the general aim of supporting lifelong learning can be realised. The proposal is the direct follow up of the Adult Education Initiative and outlines how the positive experiences of this programme can be transformed into permanent arrangements. This is done in a partly self-contradictory way: While on the one hand it presents an advanced and sophisticated vision of how to realise lifelong learning (individual focus, cross-sectoral provision), only those parts of the Swedish system formally defined as the responsibility of the Ministry of Education and Science are addressed. Adult learning covered by the Ministry of Industry, in the form of labour market training, is not discussed at all (except in the form of a general objective; to support employment), neither is the crucial role of enterprises. This is surprising as the ambitions of the proposal are to transcend a fragmented approach towards adult learning. This omission shows that positive experiences from one programme (even if it is big) do not automatically and immediately result in a different division of labour and responsibilities (and influence) in the permanent bureaucracy.

The walls between the two main public “systems” of adult education and training become even more striking when we look into the objectives currently guiding the activities of general adult education and labour market training. General adult education pursues an extremely broad range of objectives and is supposed to lead to ‘personal development, democracy, equality, economic growth, employment as well as fair distribution of resources’. In clear contrast to this, labour market training works on the basis of a new quantitative objective saying that 70% of those having concluded a labour market course should be employed within 90 days. It is obvious that these different objectives will influence the way education and training is designed and carried out. The main objective of the labour market training is however to give those with lower skills a prompt access to the labour market. Most of the unemployed need to improve their education on basic education or upper secondary education level to strengthen their position in the labour market. The Adult Education Initiative was primarily aimed at adults unemployed or lacking full three-year upper secondary qualification.

The new objective of labour market training is indeed taken seriously and systematically pursued. From an external point of view this might become a ‘double-edged sword’ possibly leading towards a kind of ‘cherry-picking’ situation where only those best skilled and most employable are recruited for labour market training. This could leave those with lower skills and a weaker point of departure, notably long-

time unemployed, totally uncovered. Our visit to Sweden gave us no indication that this danger is counteracted or balanced through a co-operation with the general system.

The Ministry of Education and Science has however informed us that there are examples of cooperation between the policy areas. One of these is the Initiative that was mainly financed by re-allocating funds earmarked for passive measures in the then Ministry of Labour's chief policy area to active education and training programmes in the Ministry of Education and Science's main area of operation. There was a consensus that unemployed who lacked upper secondary school competence needed education in order to acquire a stronger position on the labour market. For this reason they have access to educational opportunities in the first instance, and not unemployment benefits. Another example is the duty of municipalities to provide basic adult education (corresponding to the nine-year compulsory basic school) to adults who have not achieved the compulsory basic school leaving certificate. Outreach activities (communities in cooperation with unions) in order to motivate people to undertake further learning is another example is an additional example.

The '70/90-target' is an interesting example of 'steering through objectives'. From the perspective of the Ministry of Industry it is reasonable and highly legitimate to require clear effects of the investments in training. Recent examples of labour market training indicate that this target has changed the focus and direction of courses considerably. Big-scale projects like the Swedish IT (SWIT) programme are impressive in terms of employment-effect (see section 4.3. for a discussion of this), but also confirming the in-built bias towards the 'top range' of unemployed. As SWIT illustrates, employment services have introduced a much stronger and rigid selection of participants to their courses to reach the 70/90-target. SWIT received more than 90 000 applications and ended up training 11 000. The success in terms of employment after ended training is obviously related to this selection process. In a situation where unemployment has dropped considerably it can be questioned whether the most important challenge is addressed. It is possible, although difficult to prove, that those recruited to SWIT (as an example) would have been able to find training and employment on their own, without the help of labour market training. Our point is not to criticise the achievements of labour market training in general or SWIT in particular (as we will see later, some of these are extraordinary). We have used this example to illustrate how steering through more or less narrow sector-targets easily create contradictory and potentially negative results for groups of individuals. It is possible that these consequences could have been diminished by pursuing a cross-sectoral policy, forcing the various players to play at the same stage.

Talking to representatives of the two main systems, the OECD team got unclear feedback on the quality and extent of co-operation although both ministries thought that such co-ordination is important. The actual mechanisms (and traditions) for policy-co-ordination seems still to be relatively weakly developed. The positive tendencies at local, not least through the Adult Education initiative, may require increased policy co-ordination also at central level.

The division between general adult education and labour market training is nothing special to Sweden. It can be observed in most other OECD countries. This division accentuates, however, one of the main challenges facing a realistic strategy for life-long learning: Can the different sub-systems of learning be linked together in such a way that those individuals most in need for education and training, low skilled and long-time unemployed, also are served?

This dilemma of policy co-ordination between the different parts of the public system can also be observed between those sub-systems administered by the Ministry of Education and Science. Current plans, not least expressed in the proposal on Adult learning are addressing this problem and we can observe a tendency towards more coherent policy formulation, linking various parts together within a lifelong learning perspective.

Considering the high amount of resources put into public adult education and learning, Sweden is clearly one of the OECD countries best placed to realise a coherent policy of lifelong learning. If linked together in a more efficient way, public resources can be made to meet the needs of individuals and enterprises in a more efficient and flexible way than is the case today. The division between general and labour market related education and training illustrates that there's still room for improvement.

The OECD team was introduced to the idea of establishing a co-ordination function for lifelong learning under the direct responsibility of the Prime Minister. This could be one way of signalling the political priority given to the issue as well as introducing a steering at central level supporting consistency/co-ordination between the different parts of the system. The role of the Social Partners have, however, to be carefully considered in view of the need of a better link between public and private initiatives.

6.3 *The role of working life in the steering and governance of adult education and learning*

The role of working life in Swedish adult education and learning can be approached in two ways. First by considering the influence of the social partners, employer and employee representatives on the public provisions of adult education and training: The role of the social partners has traditionally been very strong, not only at central, but also at regional and local level. This influence still seems to be considerable, although somewhat changed in form. Second by considering the level of integration of public and private (enterprise-based training and learning) provisions and how such an integration is supported by current policy initiatives.

Both aspects are important in order to understand the current state of affairs of adult education and learning in Sweden. This is of particular importance since Swedish education in general, more than many other comparable countries can be described as 'school based'. This is well illustrated by vocational training where the vast majority of candidates receive their training at schools, spending a relatively small proportion of their training-time in real-life working settings (up to 20% according to current regulations). The involvement of social partners at all levels can thus be looked upon as way of securing the perspectives and interests of working life in important parts of vocational and adult education and training.

The involvement of the social partners in matters of education and training has a long history in Sweden. The form of this influence has changed somewhat during the years. A highly institutionalised system where tripartite-representation was assured at all levels and in all parts of the system has been replaced through more focused co-operation related to specific programmes and initiatives. During the discussions with the OECD team, representatives of employer as well as employee-confederations underlined that this change has not reduced their influence. Their general feeling is that involvement has been made less bureaucratic, enabling them to react to policies rather than administrative issues. Examples of initiatives and areas where the social partners role have been of particular importance is the Adult Education Initiative, the Advanced Vocational Education and, not least, labour market training. Especially the Adult Education Initiative points to a renewal of the role of social partners in the sense that practical involvement of local working life has required a high degree of participation from the social partners. Participation of social partners is thus not only a question of right to participation, but also a question of responsibilities and of renewal of roles. Increased involvement of social partners on local level will require, it was underlined, a clear national policy on lifelong learning, linking the different ministries, sectors and policies together in a better way than today. While experimental programmes like the Adult Education Initiative has contributed positively to the involvement and influence of social partners at local level, a sustainable development requires clear national signals assuring that positive trend is prolonged and transformed into permanent arrangements.

It is interesting to note that social partner representatives at national level seem to agree on basic priorities. Representatives of SAF, TCO and LO emphasised the importance of a lifelong learning approach enabling people to combine learning in school and at work in a more flexible way, but within a framework where the quality of learning is assured. A disagreement on financing is, however, apparent. The question is how big a part of the total burden of adult education and learning should be carried by the enterprises themselves, compared to the contribution of public authorities. What is said above indicates a strong involvement of social partners in the field. Representatives of employers and employees express a high degree of satisfaction with their possibility to influence decisions and their involvement at local level seems to have been strengthened.

The main problem seems to be that too few bridges exist between the different public providers on the one side and the work internal, in-company training on the other hand. This was reflected in the programme of visits prepared for the OECD team where the structure and content of in-company training basically was left out. This confirms, in our view, a tendency to overlook the important contributions made by enterprises in the field of adult learning. The problem is thus (see also section 6.3) not only how to identify, assess and recognise these informal non-formal competencies, but how to link them to other forms of learning in a more systematic and structured way. Statistics Sweden has, on the basis of their Labour Force Survey, made a calculation on how much public and private education and training providers contribute in terms of full-time places. While the contribution of *Komvux* is (approximately) 220 000 places, the Study Circles 40 000 places and the Folk High Schools 15 000 places, in-company training in Sweden approximates to 200 000 places. Although there seems to be an increasing amount of co-operation between enterprises and educational institutions at local level, the crucial role of the enterprises in developing a Swedish approach to lifelong learning is generally speaking not an active policy issue. The role of enterprises in adult education and learning is to a certain extent treated as a 'black box', -everybody knows it is important, but few know why, how and to what extent this is the case.

6.4 *The role of evaluations in steering adult education and training*

A stronger involvement of the local level in the formation of adult education and training policies implies that the central steering level, represented by the ministries and their agencies, has to develop a new role. Centred on the principle of "steering through objectives" the central level faces a series of challenges:

- Can objectives be formulated in such a way that they allow local initiative and autonomy, but at the same time guarantee a clear direction and focus at national level?
- How can the central level assure a reliable feedback in order to be able to adjust and reformulate general policies?

Again we face the dilemma of local autonomy versus central control, the balance of which decides whether we have genuine or just 'fake' decentralisation. And as we have commented in our discussions on the co-ordination between general adult education and labour market training, a formulation of objectives limited to narrow sub-sectors may lead to contradictory and fragmented policies at national level.

Evaluations (conducted by institutions external to the policy process in question) have gradually come to play a significant role in this setting. Almost any public programme or reform is nowadays accompanied by some sort of evaluation. Adult education and learning is not an exception to this and the OECD team was frequently confronted with findings of various evaluation projects.

The literature on evaluation often points to the tension between the instrumental and the symbolic functions fulfilled. An instrumentally oriented evaluation will try to document whether the results of a particular project is in accordance with the objectives set and whether clear criteria for success or failure can be identified. Whether this role actually is fulfilled depends on the utilisation of the results and conclusions by the body ordering the study. The symbolic character and function is apparent when an evaluation is carried out in isolation from the practical and political processes of development and implementation. In 'real life', evaluations will tend to combine these two extremes in various ways, leaning to one or the other side.

The OECD team was presented with a number of different evaluation-reports produced in the period 1997-2000, all covering different aspects of adult learning. Half of the reports had been commissioned by ministries, half by agencies operating at national level. Without entering into a detailed discussion on each single report, certain conclusions can be drawn on their general contributions. A striking feature is that several of the reports seem to be unwilling or unable to draw clear conclusions on what they regard as good or bad practises. Even though it in many cases will be difficult to identify and develop clear criteria and indicators for success or failure, the ability and willingness to elaborate on questions of success and failure, efficiency and legitimacy is very important. Being outside the actual process of reform and experimentation, evaluators might be able to contribute with important, additional perspectives and viewpoints, improving the quality of the feedback to the policy-makers.

The ministerial proposal on Adult learning previously referred to, illustrates the degree to which conclusions of evaluations (in this case on the Adult Education Initiative) actually are integrated into policy recommendations. The impact appears limited. One page of the proposal discusses the conclusions of the various reports, emphasising positive findings (90% of participants are satisfied with the initiative, a high proportion of participants have been employed after completed training). In addition to this, and scattered around in the document, conclusions of evaluations are used to support particular strings of argument. Evaluations could potentially operate as critical and autonomous voices helping to identify different options and dilemmas. This would probably have been very helpful when building the basis for a lifelong learning approach, as far as we are able to see, existing evaluations have only partly worked according to such a critical and autonomous model.

Based on the material available to us it can be questioned whether current evaluations fulfil the ambitious role they should be given in a system emphasising "steering by objectives" and local autonomy. It is possible that the constructive role of evaluations can be strengthened through systematic refinements of methodologies and training of evaluators. There is also a need for co-ordination of evaluation projects. Two evaluations of popular education seem to have been conducted at the same time and with overlapping objectives, but without referring to each other.

Evaluations, in the sense discussed above, are of course not the only feedback mechanism applied. Swedish authorities have emphasised the need to distinguish between evaluations on the one hand and follow-up on the other hand. By follow-up, here implies the regular collection of data at all levels of the system (school, municipality, county etc.). These data are supposed to lead to regular adjustments of policies and practises, and can to a certain extent be understood as part of a quality-assurance approach. It is not clear to the OECD team how well this follow-up has been implemented. An optimal use of this system requires a discussion on the indicators applied, on the quality of the reporting/measurement conducted, on the transparency of the system (are potential users aware of these data?) and on the overall use of this information (is information from the different institutions, levels and sub-systems comparable?).

6.5 Preliminary conclusions -- A consistent Swedish approach to steering and governance of Swedish Adult Education and learning?

Our analysis of steering and governance has been concentrated around the questions of *fragmentation, decentralisation, the integration of working life and the role of evaluations*. Even though we can observe initiatives to avoid fragmented policy making, there are still important walls between “sub-systems”, making a full utilisation of existing resources difficult. If the “final” objective is to establish a basis for lifelong learning, a priority must be to overcome this fragmentation of objectives and provisions. The challenge is to balance (necessary) specialisation with appropriate overview and co-ordination.

The danger of fragmentation is also apparent when looking into the relation between the two main providers of adult education and training, the public ‘sub-systems’ and the substantial enterprise-internal activities. While social partners are well integrated in the steering of the public provisions, and influence this in a substantial way, the link between the activities of the enterprises and the activities of the public systems is weak. One of the main challenges of Swedish adult education is to strengthen this link. This could contribute to a better co-ordination of efforts and a better utilisation of existing resources.

Even though we can observe differences between different municipalities in the way they have utilised the AEI, the local level must, and will, play an important role in realising the general objective of lifelong learning. The various experiments at local level indicate that it is possible to overcome some of the weaknesses caused by fragmentation of roles and weak overall co-ordination at central, national level. The local level can not do this alone, and the idea of introducing a lifelong learning policy co-ordination function at national level, possibly linked to the office of the prime minister, could be one way to do this. The experiences at local level, not least through the Adult Education Initiative, are impressive and deserve to be disseminated widely, also outside Sweden.

7. CONCLUSIONS

7.1 Towards a system for lifelong learning?

The notion of a single comprehensive Swedish adult education and learning system is challenged by the fact that formal and public education and training provisions (irrespective of whether they belong to Ministry of Education and Science or Ministry of Industry) do not have a monopoly on adult learning. Swedish working life, through the daily activities of big as well as small enterprises, plays a crucial role in adult learning.

To a certain degree, and in particular from the perspective of the public organisers and providers of education and training, this has been perceived as something less important, less systematic and less influential than the ‘real’ education and training taking place in schools and classrooms. This perspective seems gradually to lose its attraction, and those responsible for Swedish adult education, training and learning will increasingly have to consider how a synergy between this diversity of learning provisions and providers best can be achieved. Two important conclusions can be drawn from this:

- Policies on adult education, training and learning must increasingly focus on how in-company and work based learning can be better co-ordinated with public adult education and training provisions; and
- How to link formal and non-formal learning closer together.

An important question is thus whether current policies are able to mobilise and utilise the vast learning efforts taking place outside the formal systems. The way this challenge is treated tells us something about the scope of Swedish policies in this field: Do we talk of a narrow administration of public institutions and sub-systems, or can we see the outline of a broader strategy for lifelong learning where bridging formal and non formal learning has become a priority? No clear answer can be given to this question for the moment. Tendencies point in different directions, policies pursuing narrow sector objectives and policies pursuing broader targets seem to a certain extent to co-exist. This co-existence, sometimes taking the form of tensions, leads to a series of policy-questions and challenges which needs to be considered in the near future:

- How should the tension between (a necessary) specialisation in tasks and a negative fragmentation of functions be approached?
- How can a national policy co-ordination, transcending the numerous sub-systems of adult education and aiming at lifelong learning be developed?
- How can the enormous potential existing at local level be released, and what is the proper balance between local autonomy and central control?

Perhaps more than in most other policy-areas, education and learning policies must be based on a clear understanding of their limitations. High quality learning outcomes, in the form of knowledge and competencies, rely on partly autonomous learning processes at individual and organisational level. Experience shows that it can be counter-productive to try to control and steer these too much; at least if the objective is to support creation of new knowledge or the ability to respond to unexpected problems and challenges in an independent and innovative way. Education and learning policies must thus be able to balance two seemingly contradictory principles. They have on the one hand to be able to allocate and administrate resources in the most efficient way. This implies a highly sophisticated division of responsibilities, resulting in the best possible overarching framework for education, training and learning. Policies must on the other hand be able to support a minimum of autonomy, required by both individuals and institutions if they are to be successful in their learning activities. In the Swedish case, this balancing-act between control and autonomy has been pursued through an insistence on decentralisation of education and training policies.

146. Few countries can compete with Sweden when it comes to resources put into adult education and learning. This seems to be based on a very strong consensus saying that learning is important, necessary and frequently quite fun. The number of people attending Study Circles every year is perhaps the best example of this, showing that education and learning is not conceived as a pure instrumental activity related to narrow occupational purposes but as a broad activity linked to a far wider spectrum of purposes and values. It is very possible that this 'taken for granted' appreciation of education and learning is the most important quality of Swedish adult learning. It is also possible that this provides a very strong basis for developing:

- a lifelong learning approach where individuals are enabled to accumulate learning outcomes from a variety of settings, and
- where these outcomes are appropriately recognised by employers, educational institutions as well as in society at large.

To this extent, it is important to note that although Sweden ranks high in terms of the supply of and access to learning, it continues to invest and search for new modes and methods of adult learning. However, it is also necessary to take into consideration the fact that there can be a risk of over-provision of adult education.

7.2 Recommendations

This section highlights some of the recommendations made throughout the text in the context of the themes that are addressed in the OECD Thematic Review on Adult Learning.

Theme 1: Improving motivation and incentives

The Swedish system has several attractive features to improve motivation towards learning. These include: *(i)* free adult education at upper secondary level for suitably qualified individuals, *(ii)* good financial support for students, *(iii)* courses that are readily available to many individuals and *(iv)* a variety of providers with different approaches to the delivery of education.

New mechanisms, such as Individual Competence Accounts, are being discussed. This requires, however, that flexibility of working conditions is considered. The ability of individuals to alternate between education, training and work will not only depend on the direct financial support they receive, but perhaps even more on questions of working hours, work organisation and taxation. This will require a much closer co-operation within the public sector where services previously only marginally involved in questions of education and training must be brought into the development and implementation of a lifelong learning policy. The co-operation between public and private sector is furthermore of crucial importance. It is difficult to see how new incentives to adult learning, like the Individual Competence Accounts can be introduced without a strong commitment from the social partners.

Validation of non-formal or informal learning should be looked upon as one of the key-instruments for increasing the value of learning taking place outside formal education and training. For it to be effective, the future role of non-formal learning in the Swedish approach to lifelong learning has to be clearly defined. If outcomes from different learning settings are to be assessed and recognised according to a common reference point and/or a common value standard, it should be based on the input from different actors. The involvement of the social partners in the practical development of methodologies and systems for identification, assessment and recognition of non-formal learning has to be strengthened.

Theme 2: Integrated approach to provision and participation

The range of adult education, training and learning provision in Sweden has been broadened during recent years through various pilot programmes, some of which eventually have been mainstreamed. The core programme of adult basic education gives adults a second chance to improve their skills, and further education programmes serve vocational as well as leisure purposes. Traditionally, the public supply of adult education has been somewhat rigid. The broadening of provisions has led to greater variety and a somewhat more flexible provision. The Adult Education Initiative, the new Advanced Vocational Education, the efforts to develop local learning centres, the Swedish IT programme, the *Vaggeryd* model for labour market training and a number of other initiatives points towards a different and more flexible and varied way of organising adult learning. This reflects the high degree of experimentation that the Swedish are willing to pursue to find solutions and effective practices to increase participation.

The Adult Education Initiative has contributed to examine different models of provision and to put into practice systems that are adapted to the local needs. By enabling local municipalities to tailor their systems according to locally defined needs and objectives, it has contributed to a more flexible provision of education and training. Some municipalities have set into motion effective organisational frameworks for adult education and training to target individual needs. The example of Gothenburg offers one interesting model for steering and co-ordination of adult learning at local level, including a cross-sectoral guidance and counselling service that targets the specific needs of individuals. However, opening up for local solutions can easily result in a fragmented and unclear provision of services making it difficult for first-time users to make full use of the system.

Theme 3: Improving quality, pedagogy and variety of provision

Even though the Swedish adult education and learning can be described as complex and partly fragmented 'system', the demand for flexibility of learning forms was expressed by all players, irrespective of sector or system.

In terms of pedagogical principles, Study Circles represent an interesting alternative to traditional teaching and instruction based models for adults. And while the model can not be transferred fully into all parts of adult education, at least some of the elements should be considered. This is supported by the fact that concepts like co-operative, self-managed and autonomous learning have become important reference points in the discussions on how to organise work-internal learning.

Pedagogical approaches building on a combination of instruction in schools and learning at work have become increasingly important in Sweden during recent years. Advanced Vocational Education is perhaps the best example of this tendency, indicating that high quality adult learning may be developed through combinations of learning forms and learning contexts. Pursuing and developing such a strategy implies a focus where the question of pedagogical methodologies is combined with a focus on organisational and institutional preconditions for learning.

To be able to further develop methods as well as modes of adult learning, a much stronger attention to the training of teachers is required. Taking adult and lifelong learning seriously implies to give stronger attention to the specific needs of adults. The fact that adult learning will take place in a variety of learning contexts, in school as well as at work and in leisure time settings, needs also to be given increased attention. There are clear indications towards an increased tension between instruction on the one hand and learning on the other hand. This tension must be reflected in the Swedish approach to training of trainers and teachers.

The development of adult learning requires systematic research on pedagogical as well as institutional matters. While research-based evaluations, as in the case of the Adult Education Initiative, may prove useful, it should be supplemented by independent and long-term research. The tension between instruction and learning presents itself as an important overarching topic, covering learning conditions at school as well as at work and in leisure time. The future role of evaluations must be considered. Strong efforts are made towards evaluation of different programmes. However, several of the reports brought to our attention seem to be unable to draw clear conclusions on what they regard as good or bad practises. Even though it in many cases will be difficult to identify and develop clear criteria, the ability and willingness to elaborate on questions of success and failure, efficiency and legitimacy is very important. Being outside the actual process of reform and experimentation, evaluators can contribute with important, additional perspectives and viewpoints, improving the quality of the feedback to the policy-makers.

Theme 4: Policy coherence and effectiveness

Much of the discussion on Swedish adult education policies has focused on the tension between centralised and decentralised forms of governance. There's also an increasing attention towards the danger of fragmentation, how to avoid that a more and more specialised structure leads to inefficiency, duplication of work and provisions organised according to contradictory objectives.

Even though initiatives have been taken to reduce the barriers at horizontal (between ministries and functional areas) and vertical (central and local) levels, co-ordination is still, in many cases, insufficient. This makes it difficult to achieve an optimal utilisation of resources. Particular attention should be given to the division of labour between Ministries of Education and Industry. A true lifelong learning policy requires, however, an even broader co-operation where issues related to flexibility of work, taxation and social security (for example) are considered. Improved horizontal co-ordination must,

however, be combined with a balancing of central steering versus local autonomy. Recent developments at local level indicate that the local level is able to fulfil a more important role than previously; not least by providing services better tailored to local and individual needs.

The division of labour between public and private providers of adult education, training and learning requires closer attention. The current situation is negative, with insufficient links between the public school system and the enterprise-internal training and learning. A full utilisation of the resources currently put into Swedish adult education, training and learning requires that the division of labour between public adult education and private, enterprise-internal training is elaborated within a framework where the question of how to enable lifelong as well as life-wide (in school, work, leisure time) learning is addressed.

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ANNEX 1
Steering Group, Background Report Author and Co-ordinator

Steering Group

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Dan Fagerlund	Expert, National Agency for Education
Henrik Gorbow	Special Adviser for the Review, Ministry of Education and Science, Division for Adult Education
Eric Persson	Administrative Secretary, The Swedish National Council of Adult Education, The National Agency for Higher Education
Eva Oscarsson	Senior Administrative Officer, Ministry of Industry
Anna Rudéus	KY (Advanced Vocational Education)
Mats Söderberg	Secretary, Swedish Association of Local Authorities
Viveka Wetterberg	Special Adviser for the Review, Ministry of Education and Science and Science, Division for Adult Education

Background Report

Nils Friberg	Author of the Background Report
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ANNEX 2
OECD Review Team

Jens Bjørnåvold (Rapporteur)	European Centre for the Development of Vocational Training (Cedefop), Thessaloniki, Greece and (from 1 st of September 2000) European Commission, DG Education and Culture, Brussels, Belgium
Marie Lavoie	Senior Economist, Strategic Policy, Human Resources Development Canada, Ontario, Canada
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Beatriz Pont	Education and Training Division, Directorate for Education, Employment, Labour and Social Affairs (DEELSA), OECD, Paris, France
Patrick Werquin	Education and Training Division, Directorate for Education, Employment, Labour and Social Affairs (DEELSA), OECD, Paris, France

ANNEX 3
Programme of the visit

Wednesday 3 May – Stockholm

- 09.00–11.00 *Meeting with the Steering Group in the Ministry of Education and Science*
Review of the Report
From the Ministry of Education and Science, Division for Adult Education
Anders Franzén
Henrik Gorbow
Carina Lindén
Stefan Löfkvist
Kerstin Molander
Kerstin Svensson
Maria Tilly
Viveka Wetterberg
- 11.00–13.00 *Overview of Adult Education in Sweden*
From the National Agency for Education
Dan Fagerlund, expert
From the National Board of Student Aid
Magnus Fors
Robert Modlitba, Senior Administrative Officer, Ministry of Education and Science
From the Swedish Association of Local Authorities
Mats Söderberg, Secretary
- 14.00–15.00 *Current issues and problems*
From the Ministry of Industry, Employment and Communications
Carina Cronstioe, Senior Administrative Officer
Eva Oscarsson, Senior Administrative Officer
From the National Labour Market Board (AMS)
Levi Svenningsson, Head of Labour Market Programme
- 15.00–17.00 *Trade unions, LO and TCO and Employers federation, SAF responsible for education*
From LO (Swedish Trade Union Confederation)
Gudmund Larsson
From SAF (Swedish Employers Confederation)
Ulla Eriksson
Christer Wikfeldt
From TCO (Swedish Confederation of Professional Employees)
Mats Essemyr
Thomas Jansson

Thursday 4 May

- 08.30-10.00 *Discussion on Popular Adult Education*
From the Swedish National Council of Adult Education
Britten Månsson-Wallin, Administrative Director
Eric Persson, Administrative Secretary
- 14.00-15.30 *Folk High School: Classroom Visit*
From Fellingsbro Folk High School
Bo Nilsson, Principal
- 15.30-17.00 *Discussion on adult education associations and folk high schools in the knowledge society*
From Fellingsbro Folk High School
Thomas Eklund, Study Secretary
Ulf Hammarberg, Head of School Development
Bo Nilsson, Principal
Bengt Wentzel, Study Secretary

Friday 5 May

- 09.00-09.10 *Presentation on flexible and distance learning*
From Lindsberg
Conny Johansson, Principal
- 09.10-10.00 *The Learning Centre Concept, Masugnen – a centre for learning and development*
Bengt Björnemalm, President of the municipality of Lindsberg
Lennart Flodman
Erik Majholm, Conny Johansson, Principal, Lärcentrum Masugnen
Maria Olsson
Madeleine Sjöo
Gisela Spak
Blästerugnen - Competence development in working life and development of lifelong learning
- 10.30-12.00 *Individual study plans - strategies for flexible learning*
The Adult Education Initiative
Pupils at work - Computer course
- 13.00-14.00 *Learning centre Vingåker - distance education in languages linked to working life; education in the future - greater demands on higher education, employers and trade union organisations*
Video conference with language students
Ulrika Malmgren, NAMMO Sweden
Hans Wallin, NAMMO Sweden
Kristina Wallin, NAMMO Sweden

- 14.00-15.30 *Discussion on University studies - distance learning through ICT*
From Högskolan Borlänge
 Bengt Löfgren
 From Högskolan Gävle
 Bo Malmström
From Carlstad Universitet
 Theo Arndt
 From Mälardalens Högskola
 Timo Vassfjord
From Örebro University
 Margareta Axelsson
 Magnus Lilja
 Ingela Sjöman
- 15.00-15.30 *Discussion on labour market policy strategies*
 Local ICT centres
- 15.30 *Conclusions*

Monday 8 May – Stockholm

- 09.00–10.30 *Learning for Working Life/Labour market training*
From Semcon Education AB
 Per Lindgren, Regional Executive Officer
- 11.00–13.00 *Visit to Ministry of Industry, Employment and Communications*
 Dan Andersson, State Secretary
 Carina Cronsjö, Senior Administrative Officer
From the Vaggeryd Model
 Bengt-Åke Thelin, Project leader
From SWIT, the National Programme for IT Education
 Carina Brandin-Johannesson, Project leader
- 14.00–16.30 *Discussion on advanced vocational education*
From the Stockholm Environment Centre (Miljöcenter)
 Kjell Carlsson, responsible for education
- 16.30–17.30 *Statistics Sweden*
 Sven Sundin
 Maria Tilly

Tuesday 9 May – Göteborg

The Public Education System for Adults including the Adult Education Initiative

09.00–11.00 *Presentation of the Public Education System for Adults at compulsory and upper secondary levels*

From the Committee of Adult Education

Ulla Carlsson, Administrative Director, North Adult Centre, Vuxia

Lars Hanson, Director of Planning

Eleonor Westling, Principal, Adult Education Initiative

Swedish tuition for immigrants and design of orientation courses in regions

Gunilla Holmberg, Principal

12.30–14.00 *Presentation of school from Municipal Education for Adult with Learning Disabilities (sär vux)*

From Slottsbergsgymnasiet

Tage Gumaelius, Principal (sär vux)

Gunilla Hansson, Adult education tutor

Eleonor Westling, Principal, Adult Education Initiative

14.30–15.45 *Visit to resource centre for information on studies and guidance*

From Kunskapslyftets Hus

Katharina Sjögren, Head of the Resource Centre

16.00 - 17.00 *Work on validation in Göteborg*

Ethel Andersson-Leijon, Developer

Christian Larsson, Developer

Eleonore Westling, Principal

Wednesday 10 May – Göteborg

Research and development projects at university and university colleges including advanced vocational education (KY)

09.00–11.00 *Brief presentation of universities and university colleges
National Evaluation of the Adult Education Initiative*

From Göteborg University

P-O Thång, Dean

Monica Larsson, Researcher

Karin Wass, Researcher

12.00–13.00 *Presentation of Advanced Vocational Education*

Burgårdens Utbildningscentrum (Advanced Vocational Education), Göteborg

Anita Clausson, Principal

Annacarin Engström, Vice-Principal

Ann-Marie Kyrk, Responsible for education, International Co-ordinator

14.30–16.30 *Advanced vocational education in the technological area*
From Hisingen Upper Secondary Adult Education Centre
Bo Carlsson, Principal
Leif Jacobsson, Director of Studies

Thursday 11 May – Stockholm

Adult education in the future

09.00 –11.00 *Ongoing commissions*
From the Commission on Guidance and Counselling
Gunilla Hjort, Secretary
From the Commission on Individual Competence Accounts
Johnny Nilsson, Senior Secretary
From the Commission on More Effective Labour Market Training
Åke Zettermark, Commissioner
From the Commission on Validation
Stefan Löfkvist, Senior Administrative Officer, Ministry of Education and Science

11.00–12.00 *Adult learning in the future: KLK:s report on learning and the forth coming Bill on Adult Education*
From the Commission of the Adult Learning Initiative
Åsa Sohlman, Senior Secretary

Post secondary vocational education

From the Ministry of Education and Science
Johan Stålhammar, Project leader

14.00–16.00 *Competence development in a private company*
From Skandia
Ann Jansson, Competence developer
Leif Hansson, Business developer
Michael Włodarczyk, Director, Knowledge Management

Friday 12 May – Stockholm

Concluding discussions

- 08.30–11.00 *Discussion with researchers in adult education*
From the Council for Work Life Research
Kenneth Abrahamsson, Director of Programmes
From Göteborg University
P O Thång, Dean
From Stockholm University
Albert Tuijnman, Professor
- 11.00–12.00 *Discussion with Steering Group for the Thematic OECD Report*
From the Ministry of Education and Science
Anders Franzén
Nils Friberg
Henrik Gorbow
Viveka Wetterberg
From the Ministry of Industry
Eva Oscarsson, Senior Administrative Officer
From the National Agency for Education
Dan Fagerlund, Expert
From the National Agency for Higher Education
Anna Rudéus, KY (Advanced Vocational Education)
From the Swedish Association of Local Authorities
Mats Söderberg, Secretary
Form the Swedish National Council of Adult
Eric Persson, Administrative Secretary