CONTENTS

Editorial 3

BASIC EDUCATION AND LITERACY

George Openjuru
Adult Literacy and Development Link: A Perspective from a Non-Literate’s Literacy Practices and Environment 7

Arame Fal
A Literacy Strategy for Two Million People 19

Abdul Moktader Mamoon
An Example of Workplace Literacy 29

Snoeks Desmond
Family Literacy Project 35

Kazi Rafiqul Alam
Operational Definition of Literacy for Assessment Purposes: Literacy to Meet Basic Learning Needs 41

Eustella Peter Bhalalusesa
Towards Sustainable Development through REFLECT Methodology in Tanzania: Major Trends and Lessons 51

Alan Rogers
Adult Literacy – Adult Motivation 61

Christian Fiebig
E-Literacy: Learning to Write via the Internet 73

LEARNING IS FOR EVERYONE

Akanisi Kedrayate
Learning in Traditional Societies in the South Pacific: A Personal Reflection 81

Dickson M. Mwansa
Demystifying Learning and Knowledge: Extending the Scope of Literacy 87

A. Semchenko
The Labour Market and the Vocational Education and Training System: Possible Approaches to Cooperation 99

Interview with Peter Radtke
Our Lives Are Invariably Some Form of Compromise 113
<table>
<thead>
<tr>
<th>CONFERENCES AND DECLARATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successor Conference to CONFINTEA V, Sept. 6–11, 2003, Bangkok, Thailand</td>
</tr>
<tr>
<td>Synthesis Report</td>
</tr>
<tr>
<td><strong>Recommitting to Adult Education and Learning</strong> 125</td>
</tr>
<tr>
<td>Invitation to the Workshop on Theme 10</td>
</tr>
<tr>
<td><strong>Enhancing International Cooperation and Solidarity</strong> 149</td>
</tr>
<tr>
<td>Report and Recommendations from the Workshop on Theme 10</td>
</tr>
<tr>
<td><strong>151</strong></td>
</tr>
<tr>
<td>Mediterranean Conference on Adult Learning, Malta, 13–15 September, 2003</td>
</tr>
<tr>
<td>Michael Samlowski</td>
</tr>
<tr>
<td><strong>Introductory Welcome</strong> 155</td>
</tr>
<tr>
<td><strong>Declaration</strong> 163</td>
</tr>
<tr>
<td>Regional Festival on Learning, 16–19 October, 2003, Skopje, Macedonia</td>
</tr>
<tr>
<td>Rita Süssmuth</td>
</tr>
<tr>
<td><strong>Lifelong Learning, Adult Education, Employability</strong> 165</td>
</tr>
<tr>
<td>The Ministers of Education and Higher Education of South Eastern Europe</td>
</tr>
<tr>
<td><strong>Declaration</strong> 177</td>
</tr>
</tbody>
</table>
Editorial

Once again literacy is the main theme, many readers of the journal will no doubt say. But this time there is less emphasis on theory and concepts. The focus is on practical experiences in a wide range of countries and contexts. There are plenty of good reasons for this:

- No one has yet dared to put the number of adults now living in the world who have some sort of problem with reading and writing – from functional illiterates or semi-literates to those who have never in their lives attended a school or an adult education course – at much under the figure of 900 million that has been accepted for some time. The task for everyone therefore remains huge, and not just in the education sector.
- It is obvious to us who work in adult education that by far the greatest attention given so far to the programme of Education for All has been directed at urgently increasing the number of places for children and young people in compulsory state education. At the same time, the importance of obtaining a school-leaving qualification is being stressed; a criterion of quality has therefore been added.
- Is there no longer any point in trying to achieve a greater balance in literacy provision for all children, young people and adults? The positive discovery that children gain from a literate environment in the parental home, and that those who are now succeeding in earning a livelihood, and will need to do so for decades to come, are adults, unfortunately has only limited impact.

Among the contributions, the paper about the use of computers in literacy in Germany stands out. For the last few weeks a variety of awareness-raising advertisements have been shown on television – a young girl has to get her friend to read her love letter; a father cannot help his daughter with her homework; a worker causes an accident in a factory because he cannot understand an instruction notice. Viewers have learnt that in one of the richest industrialized countries, which has moreover had compulsory schooling for 100 years, there
are around four million young people and adults who find difficulty with reading and writing. Each of the advertisements ends with the sentence: “Don’t write yourself off – please contact...” and then follows the telephone number of the national literacy association. Can computer-based programmes help?

In 2003, this Institute was involved in a large number of major conferences. In preparing for these and following them up we made extensive use of our website, www.iiz-dvv.de

Documents were made available beforehand, and immediately afterwards, the declarations, the most important speeches and the most useful materials and studies were put on the net. However, we knew that only a small proportion of the readers of this journal have easy access to the Internet. We therefore print these documents here and state in the text where further material can be obtained.

Heribert Hinzen
Is the mere fact that one can read books and express oneself in writing the key to a job, wealth and personal independence? The notion that “literate = well-off” is widely held but cannot be entirely justified. Using the example of the working career of an illiterate 24-year old, Kasule, Openjuru stresses the importance of seeing literacy in the context of the life of the individual. Literacy only succeeds if it is adapted to people’s actual needs and requirements. Only then can it improve living conditions and contribute to independence. The author is a Lecturer and Head of the Department of Community Education, Institute of Adult and Continuing Education, Makerere University, Uganda.

George Openjuru

Adult Literacy and Development Link: A Perspective from a Non-Literate’s Literacy Practices and Environment

Background of the Non-Literate

The non-literate involved in this study was a 24-year-old man who works as a gardener, popularly known in Uganda as a “Samba boy.” He comes from a poor background and his parents, who did not go
to school, were also not able to send him to school. Fortunately his half-sisters (the same mother) were able to take advantage of the Universal Primary Education (UPE) policy and go to school so that they are able to read and write. As he is a casual labourer, some of his employers pay him a monthly wage, others pay him for the piece of work done when they need his services. In this way, he is able to raise some money to help his mother with family upkeep. He is not married, and he has no children and is still staying with his mother, who is a single parent.

The Literacy Practices of Kasule

Kasule depends on literacy mediators, who are either his half-sisters or any other persons, to read and write for him. He says people are always available and willing to help him with his reading and writing needs. He also rarely gets involved with literacy events beyond his literacy abilities. So literacy instances (events) which do not give him time to refer to his literacy mediators will be avoided.

Kasule is numerate, he is able to count his money and to find out how much he has been paid for the work he has done and if it is the amount of money agreed upon. He is able to buy things from the market or shops and get his change without help. His numeracy skills were acquired informally without any formal or non-formal learning arrangements. He only has problems if the transaction becomes too complicated, involving a large amount of money spread over many activities. However, he said he rarely gets involved with such complicated financial transactions. His level of activities does not call for such complex transactions. He said that in his life he only handles small amounts of money, which he can deal with without any problem. So for the moment there is no need for that level of complication.

The Benefits of Literacy According to Kasule

According to Kasule, literacy helps a person to move around independently, read his own personal documents and look for jobs in big
offices without fear. He would also have enough confidence to do many other things in his life. When he was informed that there are some graduates who are completely jobless and cannot even get the kind of money he is earning he maintained that even if graduates are jobless or doing the kind of work he does, and have no money, they still have a better chance than him of getting a good job any time. He believes that people like him are “condemned to poverty” because they cannot do much on their own. When I informed him that there are some people who are very rich but cannot even write their names, he could not believe that there are such people. To him it is impossible for anybody to become rich if they cannot read and write. He said, “such people are thieves.”

When I asked him to tell me what he thinks people who are educated think about people like him, he said, “people who are educated and able to read and write despise people like me. They look at us like ‘bayaye’ (rogue people).” On the other hand, he feels very sorry for those people who are like him, because he understands the kind of problem they are facing. He looks at people who are educated as very superior to him, and he admires and envies them so much.

What Kasule Would Like to Learn

When asked what he would like to learn if given a chance, instead of literacy, he preferred to learn motor mechanics, and/or driving, which could allow him to earn a better income. He preferred to learn by apprenticeship. He said he only lacked money to go for such training. When he was informed that apprenticeship under the tutelage of a motor mechanic might not require tuition fees, he said he had not found anybody willing to teach him for free.

He rejected the idea of going to a formal college such as a driving or a technical school, because according to him it requires a lot of money and the ability to read and write. He is not interested in such an arrangement because according to him he is too old for that now. His view of starting to learn, especially reading and writing, is about
going to a primary school, which is for children not people as old as him. On the other hand going to college is only for people who are able to read and write. This opinion seems to be informed by the popular perception of learning to read and write as a learning activity meant for children, and his personal ignorance about opportunities for adult literacy programmes.¹

**Analysis of Kasule’s View in Terms of the Literacy and Development Link Debate**

This will start with a look at the definition of “literacy” and “development”, which are both concepts that are difficult to define. Two perspectives of literacy are used (the new literacy studies perspective and the autonomous model) to understand Kasule’s view of literacy. An attempt will be made to set this view against the literacy and development link debate.

**Literacy According to the New Literacy Studies (Ideological) Model**

Literacy is generally defined as the ability to read, write, and do simple calculations with understanding. According to the New Literacy Studies (NLS) or the ideological model, literacy is a continuum with no single, simple, individual competency which can be called literacy. In this model literacy is a social practice in which people engage in their own different cultural ways. According to this definition, a person can be classified as literate so long as they have acquired mastery over a secondary discourse that need not involve printed materials. It could involve the ability to read and follow directions, to make predictions, to explain events, and to interact in social settings involving non-verbal communication, including sign language, Braille and any other symbols and signs. This is a very unlimited definition of literacy that could be difficult to deal with.

¹ There are practically no adult literacy programmes for the urban poor in Uganda.
Literacy According to the Autonomous Model

On the other hand, the “autonomous” model looks at literacy as a single technical skill, which is the same across different cultures. It associates literacy with progress, civilisation, individual liberty, and social mobility. It sees the consequences of literacy in terms of economic development, and the development of cognitive skills. In this model actual reading, writing and counting are what matter most, not just relations with written materials, signs and symbols.

Definition of Development

Development can be defined as the general improvement in economic, social, and political conditions of the whole society in terms of reduction or elimination of poverty, inequality, injustice, insecurity, ecological imbalance, and unemployment within the context of a growing economy. Equitable distribution of the Gross National Product (GNP) is one of the factors, which can ensure development. Development includes economic development measured by an increase in the GNP of a country, social development measured in terms of social well-being, and political development measured in terms of good democratic practices. Development can also be defined in terms of physical needs and self-fulfilment. Development is a way of life, which can be seen in the life pattern of the entire society. At the individual level development can be seen in terms of meeting the basic individual needs that improve personal skills and income, leading to improved family and personal well-being. This should also translate to individual liberty and ability to participate and become part of the wider society.

Analysis of Kasule’s Benefits from Literacy

Kasule associates literacy with improved personal welfare in terms of improved job opportunities, personal independence in terms of freedom of movement and interaction with important people, i.e. people who can give him jobs, confidence, and personal self-worth. Getting a job was one of his major concerns; he is not convinced that it is difficult even for people who are not only able to read and write but well
educated to get jobs. Kasule’s faith in the possibility of getting a job if he is able to read and write is one that is bound to lead to frustration. This is true because the Ugandan economy is characterised by high unemployment even for highly educated people. There is no chance for Kasule in the Ugandan job market what ever the job is; it will not be better than his present work.

Analysis of Kasule’s Background
Kasule comes from a generally poor economic and social background. Most people who are not able to read and write usually come from such similar backgrounds. Coming from poor parents leaves the child to grow up as a non-literate person adding to the large army of people who are not literate. Poverty is then the cause of illiteracy and illiteracy is a symptom of poverty and not vice versa. Kasule is a non-literate because his parents were poor. Now he thinks his non-literacy is the reason why he is poor. This is not very correct because there are a lot of people in Uganda who have completed secondary education but are just as poor, and on the other hand there are others who are illiterate yet they are very rich businessmen. So literacy alone is not a sufficient reason to explain poverty.

Kasule works as a manual labourer, which by its very nature requires very few literacy skills for him to perform well. His type of job has few complicated literacy events and practices. He personally said that he seldom initiates or gets involved in activities that involve too much reading and writing. This shows that his life is structured around social and economic circles whose literacy practices he can participate in comfortably. Such practices include the use of literacy mediators in the person of his sisters and getting involved with transactions that involves small amounts of money, and reading or interpreting road signs when he moves outside his workplace. It is not possible to know if knowledge of literacy can help him to come out of this level of interaction because this is currently his way of life. His way of life gives a very low value literacy, and his current literacy practices are serving him well.
Analysis of Kasule’s Learning Interest

Again, Kasule is interested in job training and not literacy. Although he admits that reading and writing are very important, for obvious reasons he prefers job training to learning new literacy skills that could involve him in actual reading and writing. His choice to learn driving and/or motor mechanics is based on the confidence he has built around his present literacy practices or working with the written world. According to him he can easily became a driver because it does not require elaborate reading and writing compared to working as an office filing clerk or records assistant. It could be true that becoming a motor mechanic or driver could improve his condition of life by improving his financial position. In his view, he is able to cope with the literacy practices required of a driver or motor mechanic. He observed that those occupations do not involve a lot of complicated literacy practices. He could continue to depend on his present literacy practices while improving his well-being. To Kasule literacy is for the moment and the near future irrelevant as a tool for improving his personal well-being.

Constructing a house  
Source: George Openjuru
His choice of apprenticeship was a very careful one because apprenticeship does away with complicated literacy practices involving actual reading and writing when learning. Apprenticeships only require an ability to observe and practice what has been observed with greater reliance on the mastery of the process being observed. In most cases it is a one on one method of training, which creates a greater closeness between the learner and the mentor/tutor, who can easily act as a literacy mediator in the literacy practices of their trade. This may save the learner from learning nonsensical literacy not relevant for his/her work. Take note that the process of learning literacy in this case would be informal, practised as part of the apprenticeship and not a special programme. In this way he can learn the literacy practices associated with driving such as reading the driving rules, interpreting road signs, processing vehicle documents, renewing his road licence and driving permits, etc., which can easily be mastered without the necessity for him technically getting involved with literacy. It can also be done through a literacy mediator.

Already from his daily experience of moving around town, he has mastered the road signs and regulations enough to enable him to operate as a driver. He has confidence in his ability to perform the above task or to learn the literacy tasks associated with the job quickly. He does not actually need to be technically literate in terms of actual reading and writing to be able to demonstrate his economic usefulness as a driver or motor mechanic or both. This emphasises the point that literacy is presently not very relevant for improving his economic well-being.

Analysis of Kasule’s Literacy Practices

When it comes to handling situations which demand reading and writing he depends on his half-sisters as his literacy mediators. Again, this is not very unusual because most people who are not able to read and write do likewise. This however leaves one problem of personal independence or privacy for a non-literate, and this could explain why his single most important benefit of literacy is independence.
For example, he would like to be able to read a medical document\(^2\) without referring it to another person, and to be able to move around freely without seeking help from another person. This independence could also help him to obtain a job. His prime concern is personal economic well-being and freedom. It could also be true that his choice of job training could have been influenced by his present situation of poverty. In such a situation, the need for survival is more crucial than educational needs.

**Analysis of Kasule’s Working and Living Environment**

It would be good to observe that the conversation revealed that the young man comes from a home and goes to work in a job that does not involve a lot of written materials. In addition he would prefer to do that type of work which will not involve a lot of written material (driving and motor mechanics). Finally, he operates in an economy, which is characterised by unemployment even for degree holders. In this kind of environment what chances are there for literacy to make any sensible contribution to his personal welfare and development? He does not come from a sophisticated background (most people in the family are not educated). He currently conducts himself in an unsophisticated ways (that is, he does not come into contact with printed matters and his life style does not encourage the use of such material). Literacy will therefore make very little difference for him. Effectively he rarely encounters frustration from being a non-literate. The chance is that he will not be able to sustain any literacy skill since there seems to be no pent-up energy waiting to be unleashed into action by acquiring literacy skills. He personally makes no pretence of this and his lack of interest in literacy shows it. This is what happens with most participants of some literacy programmes or with people who drop out of school early. This shows that the environment for practising literacy and the socio-economic conditions in which the literacy is going to be used are more important than the literacy skills themselves.

\(^2\) Kasule is not aware that the literacy practices in the hospital are illegible for most non-medical people.
Analysis of Kasule’s Thinking about the Literate, the Non-literate, and Literacy

Kasule thinks those who are educated and able to read and write despise those who are not able to read and write. He also said that even if a graduate is jobless such a person is still better than he is. On his part he both admires and envies those who are educated and are able to read and write (literate). He feels very sorry for people who are like him. He perceives lack of reading and writing skills as being a disadvantageous and inferior position. This thinking is most likely an outcome of his reflection on the way society treats people who are not able to read and write (non-literate). This kind of thinking can be located within the autonomous model of literacy. The thinking within the autonomous model believes that economic progress can be made only at a certain level of literacy in the society. This is the dominant way of understanding literacy in Uganda currently. The evidence of this school of thought in Uganda can be seen in the government’s choice of approach for a literacy programme being implemented by the Ministry of Gender, Labour and Social Development. The functional literacy approach to literacy is being used to implement the government literacy project. Okech (1999, p. 9) expressed this very clearly when he said as much in his evaluation report: “Illiteracy reduces whatever few chances are available for employment.” He went further, making the situation of the illiterate even more bleak when he said, “it (illiteracy) makes self-employment difficult since literacy and numerical skills are needed in order for one to run a successful business.” This is a very typical attitude of the autonomous model of literacy, which sees the consequence of literacy in terms of economic development. This perception makes the non-literate look at themselves as inferior beings, really unfortunate, needing help and not very useful to the economy of their country.

This is a very unfortunate perception of the literacy problem, and it is being perpetuated by the very system that purports to be solving the problem. All the time people who are not able to read and write are being informed generally by society and by the programmes which are designed to “save them from condemnation” that they have no
way out except to learn how to read and write. This was properly ex-
pressed during the conversation when Kasule constantly maintained,
sometimes with very strong sentimental statements, that those who
are not able to read and write are condemned to poverty, and that no
illiterate persons can become rich unless they are thieves. He feels so
unhappy with his situation and for people who are in his kind of situa-
tion as well. It is incredibly amazing how a particular thought pattern
pervades an entire community and informs all programme provision in
some kind of self-destructive design. There is a possibility of non-liter-
ates sitting back in resignation and self-condemnation in the name of
literacy. Literacy, in this perception, is counter-productive for develop-
ment, which it purports to serve most. This school of thought, in ad-
dition to asserting that economic development is strongly dependent
on literacy, also looks at cultures which are based on non-reading and
writing literacy practices as inferior. It also excludes those who are not
physically able to read and write from participation in the economic
activities of their nations.

**Recommendations Based on Literacy, Development, and the
Socio-economic Environment from the Perspective of the
Ideological Model of Literacy**

To avoid this scenario, literacy and literacy practices must first be
properly infused into the community’s way of life before they can
become relevant as a tool for development in that community. Of the
two, literacy practices are the more important because naked literacy
is not of any use to a person and therefore to development. So, in-
stead of worrying about literacy it would be better to encourage the
integration of literacy practices into the life of the community before
commencing any literacy programmes. In other words, creating a liter-
ate environment is more important than creating literate people and
throwing them into a literary desert. For example, computer literacy
without the culture of using computers will atrophy, rendering the
knowledge irrelevant to any human activity.

This means that literacy can only have meaning in a society that has
fully incorporated literacy into its culture, especially rural life. That is,
the culture is such that literacy is incorporated into its functioning or operations. In this way, a small dose of literacy skill will be enhanced by the participation of neo-literates in daily life which involves a lot of reading and writing. They will also have their capacity to participate in the development of the community improved. Literacy will only be a catalytic factor or a stimulant, and not a generator of development as is argued by the (autonomist) autonomous model of literacy.

These changes should be accompanied by addressing some of the inherent structural problems which affect productivity and the distribution of resources within the economy, and other such factors that cause socio-economic inequalities and unemployment. If they are not eliminated, they will act as an impediment to literacy programme efforts. Literacy can then be introduced to facilitate egalitarian participation in the economy.

**Conclusion**

I now firmly conclude that literacy has no fixed definition and that its definition varies with the culture and that even within the same culture. The definition of literacy goes on changing over time as the society progresses culturally. Most intriguing is that even within the same time and culture, literacy can be defined differently by different literacy programme providers depending on the availability of resources for implementing the literacy programme. For example, it can be as simple as encouraging the development of mediator literacy networks, which will enable a particular community to access and share some useful information. Finally, there seems to be very little direct connection between literacy and development. Between the two, I would say that development promotes the literacy and literacy does not promote development. To help the Kasule’s we need to promote development based on sound literacy practices. This will naturally attract Kasule to literacy and we may not need to intimidate him into learning literacy.

**Reference**

How can a project which aims to make two million people literate in one year succeed when the results of the many literacy programmes already carried out in Senegal can only be described as meagre? Arame provides reasons and suggests a new approach, ranging from a variety of different courses, development of new learning materials, etc., to the use of new information and communication media, including radio and television, PCs and distance learning. Arame Fal is a retired linguist who worked for over 30 years at the Cheikh Anta DIOP Fundamental Institute of Black Africa (IFAN) in Dakar. She is also a founder member of the Senegalese Development Support Organisation (OSAD), which is concerned with formal and non-formal education. This paper was given in Dakar in 2002 at the conference entitled “Workshop to capitalize on ANFA literacy experiences” (ANFA = National Association for Literacy and Adult Education), which was supported by the IIZ/DVV.

Arame Fal

A Literacy Strategy for Two Million People

1. The Poor Results of Literacy

In the absence of any independent evaluation, it is difficult to arrive at an objective assessment of the results of literacy teaching, but what is certain is that the facts observed periodically on the ground suggest a rather meagre impact.
The voting slips used in the general election of 29 April 2001 relied more heavily on symbols and effigies than on the written word. There is therefore no escaping the question of what are the palpable results of thirty years of literacy if the overwhelming majority of Senegalese cannot even read the names of their leaders and their political allegiances.

Ten years ago, Ms Mariétou Diongue Diop posed the same question, referring more particularly to newspapers. In Le Soleil of 23 September 1991, she commented thus on an article entitled *mok pothie (mokk pooj):¹ “... one legitimate question that must be asked is how two decades of literacy can have had no impact on our national journalists!”

It must be said, with regret, that mistakes in orthography are almost the norm, and researchers, writers, musicians, politicians and publicists write as best they can without feeling any need to check. To take merely the case of Wolof, the language in which most messages are written, the following hodge-podge can be found:

\[
\text{baara-yëggo, tek-teggi, rof dafa saf, kër gu set te xëgn, wax sa-wax, niaxx jariñu, yaatal gueew, joko, kër gi mo nekh, mew bi woor,² xaware and khaware, reew ken du ko pàccoo, danu koy penco, sen-too, etc., where these should read respectively: baara-ëggo, teg / teggi, roof dafa saf, kër... xeeñ, wax sa wax, ñaq gëew, jokkoo, moo neex, meew mi wôor, xawaare, réew kenn du ko pàccoo, dañu koy péncoo, séentu or sééntoo, etc.}
\]

However, there has been no shortage of literacy programmes; they appear, disappear and reappear under different names, with substantial funding and national, sub-regional, regional and international seminars, workshops and colloquia. As a consequence, Senegal is caught in a vicious circle of literacy – (experimental) post-literacy – return to illiteracy (because of lack of real application) – another round of literacy and so on.

¹ For a woman, the art of knowing how to keep her husband.
² Meew mi woor “*milk which has fasted”, meew mi wôor “milk which is safe”.
It has to be said that literacy has always lagged behind the evils that considerably restrict its results. Some of these will be listed in what follows.

**Neo-literates unable to apply what they have learnt**
Since the national languages are confined within the closed world of literacy, with no overlap with public life, which is still conducted exclusively in French, neo-literates cannot apply in practice the knowledge that they have acquired during their course (by sending a letter to the administrative authorities, drafting a complaint, being able to fulfil their full duty as citizens by voting responsibly, reading a newspaper, looking up articles in the Constitution or the Forestry Code, and so on). This being the case, relapse into illiteracy into almost inevitable.

**The lack of a clear definition of the very notion of literacy**
This is reflected in the presence in one and the same class of learners at very different levels (illiterates, former elementary school pupils, pupils from Arabic language schools, etc.).

We believe that literacy, the first milestone in basic education, should apply strictly to **00 illiterates** – to use the term current in the environment concerned to designate those who can neither read nor write – so that they can acquire the basic instrumental skills of writing, reading and calculation in a language with which they are already familiar. All those who do not meet this criterion should be directed into the appropriate pathways. Many learners sitting in literacy classes belong in courses teaching how to write national languages because they are already literate in French or Arabic.

The learners are the first to feel this need for segregation, as was apparent in the statement by a lady interviewed in 1996 during a field visit: “being in the same class as my daughter, who has completed secondary school, I cannot keep up, the levels should be separated”. Separation of levels is needed not only for the reason mentioned above but also to avoid wastage, since only 30 hours are needed for
an introduction to writing a national language, while 100 hours are required for literacy in the true sense of the term.

**Too restrictive an acceptance of functionality**

In some cases this leads to a productivist, utilitarian approach, which pays little attention – if any – to correct mastery of reading and writing, which are the gateways to other types of knowledge and self-learning from books. If a narrow vision is adopted, projects solely concerned with management, for example, will not deal with handbooks on other topics, such as agriculture, citizenship, health, the economy, etc., while literature is widely ignored in literacy programmes even though it plays a substantial part in raising learners’ cultural level through the discussion and debate to which it may give rise about the social issues facing the population.

A further drawback of acceptance of functionality is the huge number of initial reading and writing books that we may call single commodity primers. Each project thinks it needs a primer, the content of which is related to its own field of intervention. This is not necessary, and it is expensive. Without questioning the need for variety, the range could be reduced. A small number of standard primers could be designed for any project in each language, whatever the field of intervention. The vocabulary related to technical specialisms – fishing, the environment, agriculture etc. – could be covered by supporting or “post-literacy” documentation, to use the conventional term.

**A too literal interpretation of post-literacy**

If this is taken to mean “documents to be used after initial literacy learning”, during the first year, the learner has only the primer and the arithmetic book. At a literacy centre in the interior of the country in 1996 we even met what we think was an extreme case, of a lady in her third year of literacy, who was using no book other than the primer and spoke to us as follows: “Please give us simple books that tell us something new.” A literacy tutor at a different centre in the same locality confirmed that lady’s statement: “There has to be a variety of
books because always seeing the same ones demotivates learners.” More generally, there is the poverty of the suggested content, and this is surely the primary cause of dropout. Armed with the knowledge of the language that they already have, learners need to face the challenge of deciphering all kinds of texts in the first few weeks in class: literature, popular technical works, newspapers, adding machines, the telephone, etc. This can only speed up the process of learning and increase learners’ interest.

A school approach
This is the source of much loss of what has been learnt. In effect, literacy reproduces the content, methodological approach and progression of the first few years of old-fashioned primary schooling, even though the target population is very different. In the one case, it is children aged 6–7 years who are for the most part learning the language of instruction – i.e. French – while at the same time acquiring the basics of reading, writing and mathematics. In the other case, it is adults who speak the language perfectly well – sometimes better than the literacy teacher – and can calculate, some of them even being true experts in mental arithmetic. At this level, what matters most is not reciting tables and grammar lessons but training in writing. This is compounded by the pace at which letters are learnt, too slow in our opinion, collective repetition after the literacy teacher, and question and answer sessions that are manifestly too simple for adults. In short, what is needed is not encyclopedic teaching that encourages mechanical memorization but teaching the learner to use documentation and to find the relevant information immediately, always assuming that care has been taken to make sufficient documents available and to update them regularly.

Laxity in follow-up and monitoring
There are other no less important problems, which we shall not go into in detail. We shall merely mention the inadequate training of trainers, the use of teaching material which is not always suitable, the delays in making financial resources available, with unfortunate knock-on
effects on the agreed timetable, absenteeism among teachers and literacy tutors, and lack of rigour in the choice of operatives. All of these reflect a certain laxity in follow-up and monitoring, perhaps for want of funds.

2. The Use of Information and Communication Technologies

The project launched by the President of the Republic aimed at making two million people literate within one year may break the vicious circle to which we referred by setting up a voluntary literacy scheme that measures up to the challenge. At a time when Senegal has only succeeded in reaching one million people in five years, it may admittedly seem at first sight utopian to aim to make twice as many people literate in a year. However, information and communication technologies offer huge potential for the training of trainers, the rapid production of teaching materials and, above all, wide dissemination of knowledge etc. Senegal has long experience of educational radio, through the “Method” for speaking French, and of teaching via television through the experimental introduction of Wolof in elementary schools. Strengthening these institutions and changing their emphasis could help greatly in the implementation of the project at all levels: training of trainers, preparation of learning modules, dissemination of these to cultural centres, women’s centres, youth centres, local authorities, etc. There is also the Centre for Applied Studies and Resources in Distance Learning — CIERENAD — set up at the Ecole Normale Supérieure (the College of Education), with experts capable of supporting those responsible for drafting modules in national languages. Senegal does possess a range of equipment with which to reach mass audiences, from traditional literacy classes via radio and television to the most sophisticated technologies. The rest is largely a matter of rigorous organization, follow-up, monitoring, and so on.
3. The Current Situation in Respect of Trainers and Teaching Material

In these fields, literacy has unquestionable assets which should be used judiciously to best advantage, rather than attempting to reinvent the wheel.

Trainers are grouped into associations and operate in all regions. Le Matin of 10 May 2001 (p. 8) reports 895 trainers / supervisors / literacy tutors in the Region of Fatick alone; there are also the associations of languages, writers and national languages, development companies such as SODEFITEK and others, NGOs working in literacy, etc. Lastly, there is the association of retired teachers, among whom are the pioneers of educational radio and those who conducted national language experiments in schools using teaching by television. In other words, the personnel needed is available and must simply be updated in the light of new directions, both for the “two million literacy” project and for the introduction of writing in national languages.

As regards teaching materials, the Catalogue of non-formal basic education textbooks, published by the Directorate of Literacy and Basic Education (1998 version) lists 330 titles in national languages (and at that date it was far from exhaustive) comprising primers, mathematics textbooks and “post-literacy” documents on health, the environment, literature, citizenship, etc. Although these materials were designed specifically for literacy teaching, they may also be used to introduce writing. If teaching materials need to be developed, these are surely in the languages that have recently been codified. It is nonetheless true, of course, that research is never finished for all languages and must continue with the development of more effective tools, particularly those that will shorten the time needed to learn grammar, orthographic dictionaries, monolingual, bilingual and multilingual dictionaries. This research should involve experienced speakers, so as to carry out the work with rigorous professionalism.
4. University Participation

University institutions need to be more heavily involved: the Department of Linguistics of the Faculty of Letters and Humanities in Dakar, CLAD, IFAN CH. A. DIOP, the Ecole Normale Supérieure in Dakar, Dakar University Press, etc. (essentially for problems associated with linguistic research, the design of orthographic systems, training of trainers, development of teaching tools, publishing, teaching methods, evaluation, etc.).

Besides the University, all African intellectuals need to make a huge investment in the modernization of African languages, each in his or her own field of specialization. This is the path set out by Cheikh Anta Diop, who has enriched the lexis of Wolof in physics. Along this line of thinking, it is worth remembering the activities of the French jurists who made extraordinary efforts at adaptation and enrichment after the proclamation of the Villiers-Côtterêts Order instituting the use of French in the law and the civil administration, in order to transpose into French the law that they had learnt in Latin. This was of benefit to the overwhelming majority of the French population, who did not understand that language.3

5. Participation by the Media and Mass Organizations

What television and radio journalists have done to adapt national languages to the needs of modern communication can be repeated by the written press. There is a large public of economic operators, agriculturalists, stockbreeders, artisans etc., to be won over. While waiting for this to take shape, the competent authorities could request the media to disseminate information about how to write national languages.

3 See 450th anniversary of the Villiers-Côtterêts Order, meeting of 28 September 1989, Académie Française.
The trade unions, political parties, women’s associations, human rights organizations, etc., have a key role to play. The teachers’ unions in particular could take practical steps to prepare effectively for the incorporation of national languages in the education system, which they rightly demand, such as ensuring that all teachers have learnt how to write the national language of their choice. Similarly, they could consider the possibility of making use of the cultural weeks organized traditionally within schools to introduce their pupils to writing national languages. Teachers and their pupils would thus form a valuable reserve of trainers for literacy campaigns. It should be pointed out that orthographic systems have been devised in harmony, so that having learnt how to write one language, it is easy to move on to another language, by making a few modifications.

6. Introducing Public Servants to Writing National Languages

CNREF recommended this step as a complement to mass literacy in order to facilitate formal communication between the staff of various public services and the mass of the population who had learnt to write in national languages. It should be remembered that this recommendation applied not only to government staff but also to students at training colleges (journalism, police, post office, administration, etc.) and to workers in the private sector, notably those arranging seminars in national languages for the non-formal sector (agriculturalists, stockbreeders, fishermen, etc.). A start was made on this in 1994, at the seminar opened by President Abdou Diouf for national government staff, but unfortunately there was no follow-up. It is to be hoped that the desire firmly expressed by the President of the Republic will be translated this time into action that is rigorously carried through.

4 Knowing how to read and write is a human right.
Workplace literacy is not a different stream of education, but a kind of non-formal education in terms of its approach, allowing people to become literate in their own working environments, during their working hours. A workplace literacy course was specifically designed by an international organisation experienced in providing literacy for a group of illiterate workers employed by YOUNGONE (the largest export-oriented sportswear manufacturers in Bangladesh). The idea of workplace literacy is very new in Bangladesh, and has so far only been used in the corporate sector, particularly in garment manufacturing companies. The author is an education coordinator in Dhaka, Bangladesh.

Abdul Moktader Mamoon

An Example of Workplace Literacy

Course Background

The adult literacy rate in Bangladesh is about 41.3% (World Bank Human Development Report, 2001), although government statistics put it at 65.5%. Bangladesh lags behind most other Asian countries in terms of its overall literacy rates. People hold different views regarding the reasons for this poor performance, but poverty has been commonly recognised as the main cause. A large section of the population in Bangladesh has a low standard of living, earns a very meagre income and is illiterate.
YOUNGONE is one of the largest Korean export manufacturers of sportswear in the world. It is also reputedly the largest single foreign investor in Bangladesh. “Nike” is the main buyer of YOUNGONE products, with the bulk of exports going to Western Europe. The YOUNGONE authorities decided to provide basic literacy skills to all of their illiterate workers, in order to attain a fully literate workforce. Initially, the idea of workers’ literacy came from Nike. It was the outcome of a campaign for “clean clothes” by NGOs and activists working in Europe, and a movement for the safety and security of workers in their respective workplaces. Nike committed itself to reforming its existing work practices. This commitment also applied to its subsidiary and contract operations. Nike showed a strong commitment to reform in six key areas: Health & Safety; Child Labour; Independent Monitoring; Worker Education; Micro-enterprise Credit; and Funding for Research on Responsible Business Practices. YOUNGONE, being a producer for Nike, is in the process of fulfilling most of the commitments made by Nike.

YOUNGONE operates seven factories in Bangladesh, with approximately 20,000 workers. Through a literacy base-line survey, YOUNGONE discovered that more than 20% of its total workforce was illiterate. The company authorities then selected illiterate workers, and invited Concern (an international NGO working in Bangladesh on health, education, and community development) to design and facilitate a literacy course. Concern designed a six-month literacy course for 3,600 workers in factories in both Dhaka and Chittagong.

**Workers’ Background**

Most of the workers at YOUNGONE are women from poor families, with an age range of 15 to 35. The illiterate workers had never attended school in childhood, due to poverty and other social barriers. They were fortunate to get jobs in factories without any literacy skills, as there are millions of literate jobless people in the country.
Course Implementation

Course Curriculum

The curriculum of the workplace literacy course was especially designed for the workers, using the Language Experience Approach (LEA). No printed materials were used in this literacy approach, and instead, the teachers encouraged the participants to identify words, phrases, and numerical terms widely used in YOUNGONE factories, specific to the participants’ own literacy needs. The terminology taught on the course thus reflected issues from the daily lives of the students, their employment context, and the code of conduct of the factory premises, including notices, instructions, directions, labels and packets of products, and the language widely used inside the factories.

Student Selection

In accordance with the agreement between Concern and YOUNGONE, Concern selected the students through a process called a “gentle test”. The test gave an impression of the actual literacy level of the workers and it was helpful in the formation of groups with common learning needs. Concern also selected the literacy facilitators through interviews, and organised a five-day training course for the teachers, aiming to provide orientation on curriculum, classroom organisation, the teaching-learning process, and student progress assessment.

Course Competencies

The course comprised basic literacy skills, along with some numerical skills, including the following:

Reading

● Read and understand 4-letter words using different letters in Bangla (national language of Bangladesh) and selected key words in English, as relevant to their job

1 A student-centred learning system that facilitates the learning context with the students’ own language pattern.
• Read sentences of up to 6 words in Bangla
• Read numbers from 1 to 100 in both Bangla and English

**Writing**
• From dictation, write words which they had read in both Bangla and English
• Write at least 3 sentences of their own formation in Bangla
• From dictation, write the numbers 1-100 in both Bangla and English (numerical form)

**Mathematics**
• Add 2 lines with 2 digits, and subtract 2 lines
• Be acquainted with the place of units, tens and hundreds
• Acquire a basic idea of multiplication, division and measurement units

**Class Organisation**
120 classes were organised, with 20 participants in each class. Through this system, a total of 120 sessions were held every day. Each student had to come to class on alternate days, and s/he received a total of 72 hours of teaching.

**Learning Process**
As mentioned above, the Language Experience Approach was followed in the literacy classes. This approach allows students to start learning a language through their own vocabulary and language pattern. The students have a choice of learning contexts, which can be words or sentences. At first they become familiar with the context, and then they start to learn letters and vowel signs. When they have learned a few letters, they construct new words using them. In that way, they learn the basic skills of reading and writing. They also learn numbers and simple calculation, using real-life examples.
Operational Support

Concern provided technical assistance in the form of supervision and monitoring of the programme. The programme started in September 2001 and ended in April 2002. Concern ensured course supervision by deploying an experienced supervisor for seven months during the organisation, implementation and evaluation of the course. The supervisor visited the literacy classes daily, to observe the learning process and the progress of the students, and to provide immediate support to the teachers. YOUNGONE authorities provided administrative and logistical support through counsellors, ensured regular attendance at classes, and offered follow-up support.

Course Assessment

After the completion of all the courses, a course assessment took place, which included a written and oral test for each student, interviews with teachers and counsellors, and an analysis of monitoring documents.

Assessment Findings

Attendance rate and test results

In the workplace literacy assessment, the correlation between attendance rates and test results was analysed from a statistical perspective. A positive correlation of 0.7459813 was established.

Student results obtained in different categories

The test results were categorised into 4 different grades, according to mark ranges:

- 28% of students obtained 80 to 100% (‘A’ grade)
- 24% of students obtained 60 to 79% (‘B’ grade)
- 29% of students obtained 40 to 59% (‘C’ grade)
- 84 students obtained less than 40% (‘D’ grade)
**Attendance**

1. The overall attendance rate was quite poor, averaging 31%.
2. During the off-peak season, attendance was higher than during the peak season, which indicated that production pressure was the major cause of poor attendance rates.

**Competency test**

1. Students performed better in the mathematics component than in oral and written skills in both Bangla and English.
2. Students were good at calculations, but weak at descriptive writing.
3. The overall performance of students was good (61%), considering their attendance rates, and would have been better if they had attended classes on a more regular basis.
4. A significant number of students obtained over 80%.

**Sustainability**

The sustainability of literacy skills depends entirely on opportunities to practise. There is some scope for the neoliterates to practise their literacy skills in YOUNGONE factory premises, so the positive results of this project should be sustainable.

**Conclusion**

This project on workplace literacy indicates that if the relevant authorities are willing to take the initiative, they can support the development of their staff. YOUNGONE is one such manufacturing company, which is trying to ameliorate the situation in its factories. Other manufacturers within Bangladesh can learn from YOUNGONE how to establish a healthy environment in their factories. Workplace literacy is an attempt to provide educational opportunities to workers, and could be widely replicated throughout the corporate sector.
Ms Snoeks Desmond heads a small but successful literacy NGO in Kwa Zulu Natal called Family Literacy Project (FLP). During her university studies she looked in detail at the reasons for the success or failure of literacy projects in this province of South Africa. Her research showed that one of the main reasons why adults participated in literacy programmes was so that they could support their children and understand the problems and issues that their children faced at school. IIZ/DVV is at present supporting FLP in an attempt to expand this approach, which incorporates aspects of REFLECT, to other interested small organisations in Kwa Zulu Natal.

Snoeks Desmond

Family Literacy Project

The idea of family literacy is gaining ground in South Africa and different approaches are being experimented with. Some projects are based in pre-schools and crèches and work with parents and children together. Others target pre-school teachers themselves. A project where the main focus is on the parents and through them the children is The Family Literacy Project in Kwa Zulu Natal, South Africa.

The Family Literacy Project was not established as a response to an articulated community need but was prompted by research findings into the development of early literacy skills. The research study was conducted over three years into the effectiveness of early childhood interventions by the national Department of Education’s ECD Pilot Project. One of the findings was that despite training of community based pre-school teachers, there was little or no improvement in the literacy scores of the young children in their care. A different approach seemed necessary and using information from family literacy projects in other parts of the world, strengthening of parental skills
was a way of ensuring that young children had a good start to their literacy development.

The main aim of the Family Literacy Project, which brings together adult and early literacy, is to encourage young children and their adult carers to see learning to read as a shared pleasure and a valuable skill. The emphasis is on the enjoyable aspects of reading and writing and underpinning this is the belief that it is easier to learn something when actively involved and having fun. This does not mean that learning will not require some effort, but it does mean that it is not seen as dreary. So, the work of the project is based on the understanding that for young children to become literate reading and writing must be introduced into their lives as desirable and enjoyable skills. Adults who care for them, parents and teachers, should guide them and by example demonstrate the importance of literacy. It is an imperative that adults are seen to be enjoying being literate and using their skills in many different ways.

In the Family Literacy Project groups, adults come together to improve their own literacy skills but integrated into each unit of six to seven sessions are supplementary materials, discussion and activities that link what the parent is learning to the way she interacts with her own children at home.

The project is based in deeply rural areas of the Southern Drakensberg. This is a world heritage site and is very beautiful but for most people who live there life is hard with no electricity, poor roads and no running water. There is little paid employment and many of the men work in cities several hours’ drive away.

However the project took some time to develop this method of working. At first, in March 2000, three family literacy groups were established and six workshops were run for each group. The adults discussed ways they could support the development of early literacy skills in their children and every session included a chance to try out a play activity.
Although the parents were not asked about their own levels of literacy it was clear that many were struggling with reading and writing. With this in mind activities were designed to help adults as well as children develop skills such as matching, letter recognition, sequencing and interpreting pictures.

Parents made books, cutting out pictures from magazines. Working in pairs, they practised how best to use these with their children, asking questions and modelling how to handle the book.

Two of the groups were established alongside under-resourced but imaginatively run pre-school classes. During the workshops the group observed the teachers working with the children.

The first activity observed was story telling and the adults were so interested in this that at the next session one group arrived an hour early so that they could watch the teacher and children busy with a different activity.

The third group also existed as an adult literacy group. The crèche alongside this group was run by two women with no early childhood development training and was a safe but dull place. Sixty children crammed into a small rondavel left little space for any activities.

The adults, however, were excited by the workshops on early literacy. This group followed the same programme as in the other two groups but without any input from the pre-school workers.

A problem in the first two groups described was that attendance was erratic. There was always a group of women present, but many were there “representing” others, or came because on that day there was no casual work available in the forest or fields. Attendance at the third group was consistently high and apologies were always given if, on a rare occasion, someone was absent. This could be attributed to the fact that the group had been meeting for adult literacy lessons since 1997 and so had established a strong sense of the importance
of regular attendance. The question arose -if an adult literacy component was introduced into the other two groups, would attendance there also improve?

To test this out the project was allocated funding to engage a consultant to conduct a participatory rural appraisal. The focus of this appraisal was to determine adult literacy needs. Each group was asked to select a local woman who could, in 2001, be trained as an adult literacy facilitator. The facilitators were then trained in REFLECT methodology and helped conduct the appraisal that has since served as the baseline for subsequent evaluations of the project.

By March 2001 these facilitators had attended four weeks of adult literacy training and their brief was to establish adult literacy groups at the two sites where workshops had been run, and to strengthen the existing adult literacy class. They were also to work with three new groups established close to the existing groups. The expansion of the family literacy project into these new sites was partly the result of one of the findings of the participatory rural appraisal, whereby teachers expressed the wish to set up family literacy groups attached to their pre-schools.

So, early in 2001, in addition to the first three family literacy groups, four new groups were set up. One of the adult literacy facilitators was unable to attach herself to any pre-school or crèche as the parents in her area were all employed as farm workers or in co-operative ventures and were not free during the day. Her group is the only one not attached to a pre-school.

Each group now meets regularly for sessions led by the adult literacy facilitator. The method used is one that brings together the training received in adult literacy as well as REFLECT methods. In addition every unit, about eight lessons, includes a session on early literacy to encourage parents to help their children develop relevant skills.
During each unit the group decides what action to take that will use their new knowledge. These range from asking a husband to use a condom (HIV/AIDS unit); walking your child to crèche (child protection unit) to starting an income generation project (crime and poverty unit).

The Family Literacy Project has also tried to engage group members in different ways that use their newly developed or improved literacy skills.

Development of books: several readers have been developed by project staff. Before the books were printed, they were read by family literacy group members. They underlined words they found difficult. The text was changed to ensure that the books were accessible to most group members.

The women involved in the development of the books had their names included in the acknowledgements. This was important in recognising the contribution made and has served to build a positive attitude towards using literacy skills.

Libraries: every group has a small library. Women and children borrow books to read at home. Book club meetings are held every week in the groups and members discuss the book they borrowed. In addition, group members help the family literacy facilitator record the borrowing and returning of books.

“The Family Literacy Project has definitely started a culture of reading amongst the participants. Most of the participants read on a regular basis (up to 3 times a week or more), sometimes in the evenings or late afternoon, but mostly over the weekends when they have a bit more time available to themselves. Individual reading includes library books, newsletters and magazines.” Evaluation, October 2002

Pen friends: A pen friend network exists between the groups with women from one group writing to those in a neighbouring group. This
was difficult to initiate as women felt uneasy about writing to people they did not know. However after the first exchange of letters, the flow has increased and women were delighted to meet their pen friends at the December 2002 celebrations of the whole project.

Notice boards: community notice boards are maintained by each group to be read by the wider community. Information on these is taken from the most recent unit covered by the group. Group members draw or write, for example, about child protection or HIV / AIDS. As with the pen friend initiative, this took some time to become established. A workshop was held for one woman in each group to learn the skill of lettering and how to create posters. This woman is expected to co-ordinate other learners to make sure the notice boards are maintained and the information is changed regularly.

Parents and children: known as “Umzali Nengane” (parents and children), journals are kept by the women to record interactions with their children. They paste pictures in the books and talk to their children about the pictures. Sometimes they record trips to town or write down a child’s comments on a book they have read together. This has been particularly important in modelling use of literacy and shared enjoyment in talking and reading together.

Newsletter: the project has a regular newsletter edited by one of the facilitators. Articles cover project news and information, there is a word search and group members write in to the editor.

By the end of 2002, many group members had passed several external examinations and others had passed lower level tests set by the project. More importantly, the women are now visiting other mothers in their areas taking out books and showing them how to read to their children and discussing the importance of games and conversations. This is a new venture in 2003 but the early signs are positive. The word is out that reading and writing are fun, and that with the introduction of books into these very rural and impoverished areas children can be read to and everyone benefits.
Kazi Rafiqui Alam, Executive Director of the Dhaka Ahsania Mission (DAM) Bangladesh, one of the leading NGOs in Bangladesh working at the grassroots level and at national and international levels in the fields of non-formal and formal education and poverty, describes the work, aims and assessment criteria of the Community Learning Centres. The curriculum of the community-based approach used in DAM Centres is founded on essential human needs such as food, health, the environment, etc., with particular reference to the poorest sections of the population, on the inclusion of continuing and further education activities, and on reinforcement of learning through structured post-literacy courses. The views of participants are an important element in evaluation of courses. This paper was presented at an “Expert Meeting on Building a Conceptual Framework for Literacy Assessment” organized by UNESCO in Paris on 10-12 June 2003.

Kazi Rafiquil Alam

Operational Definition of Literacy for Assessment Purposes: Literacy to Meet Basic Learning Needs

The basic learning needs of the people comprise both essential learning tools and the basic learning content required to be able to survive, to develop their full capacities, to live and to work in dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions and to continue learning.¹ The Dakar EFA Framework of Action set goals to ensure that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes;² also to ensure that

¹ Art. 1, World Declaration on Education for All (1990).
learning outcomes especially in literacy, numeracy and essential life skills are achieved by all.³

Literacy (including post-literacy) interventions planned for adults and young adults thus need to support them in continuous updating of their knowledge and level of awareness through access to accurate information about strategic needs for a better life and enable them to transfer the information into practice and make decision(s) to find a way out of poverty and become self-reliant. Improvement in quality of life can be achieved through addressing individual needs as well as the needs of the community as a whole. Without comprehensive community development the individual’s empowerment would not yield much, particularly for socio-political and cultural changes. Here lies the importance of four pillars of learning: Learning to know, Learning to be, Learning to live together and Learning to do.⁴ Typical learning needs of the people, particularly the poor, cover four skills: a) Skills of learning, b) Skills relating to quality of life, c) Productivity skills, and d) Skills relating to organization, attitude and values.⁵ Figure 1 explains poverty manifestations and Figure 2 depicts the basic learning needs of illiterates.

Taking into account the needs of the people, in general, and the needs of the poor in particular, the aims of literacy programmes should be to instil knowledge, skills and attitudes in reading, writing and numeracy based on needs and problems.⁶ They should activate learners to take the initiative for their personal development and the development of the society. The expected outcome from literacy and continuing education programmes should cover the followings:⁷

i) Communicating smoothly;

ii) Reading materials necessary for improvement of the quality of daily life;

---

⁴ Delors Report.
⁵ UNESCO (1998), Basic Education for empowerment of the poor, Bangkok.
⁷ Ibid.
Figure 1: Poverty manifestations of illiterates

Figure 2: Basic learning needs of poor illiterates
iii) Expressing ideas in writing and being able to share them with others;
iv) Solving simple numerical calculations;
v) Demonstrating positive attitudes towards acquiring further knowledge and skills;
vi) Being able to identify the problems faced by the individual and his or her community;
vii) Actively participating in the socio-economic and cultural activities of the community.

Along with literacy, post-literacy activities should be planned as an integrated component to cover the multi-dimensional needs of human beings through a package of educational support services in different media. The ultimate objective should be to create increased access to information, so that all people in the society can utilize the information for improvement of their quality of life, and to create scope for occupational skills development, development of management skills, leadership, etc. through face to face training or self-learning.

In Dhaka Ahsania Mission (DAM),\textsuperscript{8} Bangladesh, the intervention areas of the literacy programme generally cover the following:

- Imparting literacy to all illiterates, particularly the poor from rural, remote and difficult areas, through development of programmes designed to serve the needs of women, out-of-school children and youth and/or other defined disadvantaged groups. Literacy programmes cover issues of basic human needs and also issues for improvement of quality of life like health, nutrition, population, agricultural techniques, the environment, science, technology, family life, including fertility awareness, and other societal issues.
- Making arrangements for continuing education for further education, consolidation or improvement of skills through structured post-literacy programmes, linkage between formal and non-formal education and linkage among literacy programmes, different

\textsuperscript{8} Dhaka Ahsania Mission, a national level NGO with consultative status with UNECOSOC and Operations Relations with UNESCO. Visit \url{www.ahsania.org} for details.
educational programmes and development agencies in order to create scope for application of the knowledge acquired.

The community-based intervention of DAM is delivered by organising community learning centres, known as Ganokendra. Figure 3 explains how this approach addresses the basic learning needs of poor illiterates taking into account the context.

The major thrust in DAM’s interventions is on acquisition and furtherance of essential life skills. The following table gives an account of the skills-based interventions in the literacy programme of DAM in Bangladesh.

**Figure 3: DAM’s community-based approach for meeting basic learning needs**
### Table 1: DAM’s skill-based literacy and continuing education interventions

<table>
<thead>
<tr>
<th>Life Skills</th>
<th>Interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literacy Skills</td>
<td>● Literacy and numeracy practice through graded books (suited to the level of learners), newsletters, newspapers, booklets, posters, wall magazines, charts, games.</td>
</tr>
<tr>
<td>Functional Skills</td>
<td>● Bringing change of behavioural practice in health, sanitation, and environmental affairs through interactive discussion, supply of BCC (Behaviour Change Communication) materials and linkage with local government and non-government services in the area.</td>
</tr>
</tbody>
</table>
| Social Skills   | ● Training in gender sensitization, development of decision making skills  
● Organization of socio-cultural activities, issue-specific action groups (e.g., for prevention of dowry, early marriage, etc.)  
● Supply of information and communication materials on social empowerment issues |
| Economic Skills | ● Providing support for market survey and identification of viable economic activities  
● Organisation of trade-based skill development and enterprise development training  
● Linkage with micro-finance services/organizations  
● Marketing support services |

### Levels of Literacy Skill

In literacy sessions the adults learn incrementally – from the simple to the complex – and move gradually to the deeper levels of concepts. Target/expected competency levels in terms of reading, writing and calculation (3R) may vary in different contexts depending on the
learning needs of the people enrolled. But the principle of gradual increase in the expected competencies over time is common in all cases. In DAM, the target 3R competencies are divided into 5 levels. The following table gives an example of reading and writing competencies at different levels of the literacy curriculum.

Table 2: Example of literacy competencies at different levels

<table>
<thead>
<tr>
<th>Levels</th>
<th>Expected reading skill (Example)</th>
<th>Expected writing skill (Example)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Able to read and understand sentences comprising 8 words having font size 36.</td>
<td>Able to write 5 simple sentences of one’s own.</td>
</tr>
<tr>
<td>2</td>
<td>Able to read and understand posters, signboards, etc. having font size 18 &amp; above.</td>
<td>Able to express simple issues in writing.</td>
</tr>
<tr>
<td>3</td>
<td>Able to read and understand simple stories, features in specially developed newsletters.</td>
<td>Able to give answers in writing</td>
</tr>
<tr>
<td>4</td>
<td>Able to read text with clear and correct punctuation.</td>
<td>Able to fill in simple forms</td>
</tr>
<tr>
<td>5</td>
<td>Able to read different books, magazines, daily newspapers and explain the matter to others</td>
<td>Able to write at least one page on a specific issue expressing one’s own ideas.</td>
</tr>
</tbody>
</table>

Learning Process

Literacy programmes usually allow individuals to acquire knowledge and skills through a variety of activities, promote informal learning, and encourage people to make and follow their own educational plans. In order to create scope for literacy practice and for acquiring life skills, access to information and organisation of community development activities with local initiatives should become the major focus of literacy programmes.
The participants in the DAM literacy programme learn through self-reading, guided reading, discussion of issues, and training. The learners also learn by doing. For example, at many literacy centres in Bangladesh, socio-cultural activities are organised with community support for promotion of gender development, environment conservation, recreation, immunisation, etc. Each centre can have its own plan for organisation of social activities depending on the decision of the members. Examples of activities are organisation of courtyard meetings, rallies, running an immunisation centre, observance of national days, arranging drama, folk song sessions, sports, etc. In the centres, local experts, such as local craftsman on handicraft design, may be invited to facilitate discussion meetings or skill training programmes. In other cases, assistance from outside resource persons, such as a government health worker, can be utilised for the development of a community health programme.

**Assessment Issues**

A literacy programme cannot be considered an isolated educational approach. It functions within the broad framework of education as a
whole for the empowerment of people. The scope of literacy interventions is hence widened both horizontally (covering multi-sectoral functional areas of learning) and vertically (covering various levels of learning), catering for the continuous learning needs of different segments of the population. Assessment of literacy achievement should thus be formulated from that perspective.

The major focus of assessment should cover contents (whether these are based on individual learning needs), learning methods (what extent interactive using multiple ways of teaching and learning), educational materials (whether supportive to individual practice) and actual practice itself. The learning assessment process needs to be built-in in the learning process so that the learners themselves can assess their own progress, can see the changes that have started to take place in their day-to-day life. This would facilitate the process of further learning as both the learners and the literacy provider can use the current level of achievement in planning the next course of learning.

The following example\(^9\) gives a number of functional indicators planned for a literacy programme particularly designed ‘to improve the skills of learners in community water management’. Indicators used in that project are as follows:

- Extent to which the participants acquire the skills to handle the water problem locally
- Types of skills acquired
- Are the skills transferable and sustainable?
- Whether there is scope for further improvement of skills
- Are the skills in use?
- Effects resulting from skills development

\(^9\) Source: UNESCO, Bangkok (1999), Monitoring and Evaluation of Literacy and Continuing Education Programmes.
Conclusion

The main objective of literacy programmes is to improve the learners’ literacy competencies as well as knowledge and skills essential for day-to-day life. Since assessment refers to verification of the learners’ level of achievement vis-à-vis required skills, the first thing to be decided is what skills are expected to be achieved by the learners. For the operational purpose of assessment, the domain should cover both literacy competencies and needs-based functional knowledge and skills. Precisely, any operational definition of literacy denotes ‘acquisition and retention of essential literacy competencies covering reading, writing and calculation skills and life skills based on the day-to-day functioning of the learners concerned’.

Assessment of whether the required skills are achieved or not can be best judged by the learners themselves through practice of the skills in everyday life. From a programme perspective, there are other ways of assessment that are usually done by external assessors who make value judgements about the achievement. These include individual/group assessment by supervisor/teacher, inter-group/inter-personal assessment by learners, assessment by parents/community and/or assessment by outside assessors.

The tools for assessment may be structured observation/test questionnaire, checklist, scorecards, rating scale, mapping, etc. Whatever tools and processes are used for assessment, in literacy interventions assessment should be planned as an informal (non-threatening) way of measuring the learning outcomes and it has to be a continuous effort, rather than a one-shot exercise, because retention is more important than acquisition in any literacy intervention.

10 UNESCO Dhaka, Training Manual on Competency Based Learning Assessment.
Tanzania’s Vision 2025 includes the complete eradication of illiteracy. It has been decided that the REFLECT method would an appropriate way of achieving this goal. This paper examines a pilot project (Community Level Basic Education – CLBE) implemented by ActionAid Tanzania (AA Tz)\(^1\) using REFLECT methodology in two poor rural communities in Tanzania. The descriptions and conclusions given in this paper are based on an evaluative study to assess the impact of the CLBE project over the four years (1998–2002) it was in operation. Dr Eustella Bhalalusesa is a Senior Lecturer in the Department of Adult Education of the Faculty of Education, University of Dar es Salaam, Tanzania. Currently, she is also Head of the Department of Adult Education and Extension Services. She has been working closely with NGOs and government agencies involved in the education of adults.

---

Eustella Peter Bhalalusesa

Towards Sustainable Development through Reflect Methodology in Tanzania: Major Trends and Lessons

Introduction

Tanzania’s Vision 2025 aims at a high quality of life for all Tanzanians through the realization of universal primary education and the eradica-

\(^1\) ActionAid is an international non-governmental development organization working with poor communities in more than 30 countries in Asia, Africa and Latin America, to eradicate poverty and its causes.
tion of illiteracy, among other things. Within the Vision 2025 context, education is the strategic agent for attitudinal change and the creation of a well-educated nation with the knowledge and skills to solve the development challenges which face the nation. The Vision emphasises the need to ensure that science and technology, including awareness of its application for promoting and enhancing productivity and reducing people’s vulnerability to poverty, permeate the whole society through continuous adult learning and publicity campaigns. Within the same context the Ministry of Education and Culture has decided to adopt the REFLECT methodology as an appropriate approach to the provision of adult basic education in the country. Several pilot programmes have been launched, and these have demonstrated some positive results as well as some lessons.

The approach used to collect information for the evaluation consisted primarily of a desk study and field visits to the project areas. The desk study involved detailed analyses of documents relating to the establishment, implementation and overall progress of the project. The field visit involved five comprehensive site visits during which face-to-face interviews and focused group discussions were conducted with REFLECT instructors, participants in the REFLECT circles, district officials and community leaders. Interviews were also used to collect information from officials within the Ministry of Education and Culture (Adult Education Unit). The field visit provided an opportunity for direct observation of REFLECT circles and activities.

The paper begins by highlighting the origins of the REFLECT methodology. It then looks at its development in Tanzania. This provides the basis for a description of the implementation of the CLBE project. The next part of the paper illuminates the main achievements and problems. The last section lists recommendations for improved practice.

The Origins of the REFLECT Approach

REFLECT is the acronym for “Regenerated Freirean Literacy through Empowering Community Techniques”. It is based on the theory of
conscientization, pioneered by the Brazilian educator Paulo Freire. The emphasis is placed on dialogue and action, awareness-raising, cooperation and empowerment. Adult learners explore development challenges and find ways to overcome them. Such issues become the basis for learners to be taught literacy and numeracy skills. Communities are also encouraged to use these skills to generate income to improve their livelihoods. This empowering process gives an opportunity to freely discuss any issue including sensitive cultural traditions. The main task of facilitators is to keep the interactive dialogue on track.

REFLECT was developed by ActionAid in 1993 and first used in El Salvador (South America), Bangladesh (Asia) and Uganda. REFLECT is now used in over 60 countries to tackle problems in agriculture, HIV/AIDS, conflict resolution and peace building.

Development of the REFLECT Approach in Tanzania

Immediately after independence in 1961, the government adopted the Fundamental Education Model promoted by UNDP/UNESCO during the period 1946–1964. Adult basic education was restricted to the acquisition of reading and writing skills by as many learners as possible but did not take into account their different needs, interests and characteristics. At independence, 85% of the total population (80% of men and 98% of women) did not know how to read and write (Nationalist Newspaper, 24 August 1967).

Following the Teheran Conference of 1965, UNESCO in collaboration with UNDP launched an Experimental Functional Literacy Programme between 1967 and 1972 in 11 developing countries, including Tanzania, to find out the most effective means of eliminating illiteracy. This model, modified from the Fundamental Education Model, assumed that there was a positive correlation between literacy and socio-economic development.

In practice, functional literacy tended to be restricted to improving vocational skills and work-oriented aspects of literacy programmes
related to issues of priority to the nation in the area of economic
development. Tanzania’s three Five-Year Development Plans (1961-
1974), for example, underscored agricultural productivity, particularly
related to cash crops, without taking into consideration the fact that
the majority of people were still subjected to poverty and miserable
living conditions. Learners, most of whom were women, became de-
motivated and withdrew from classes.

As a response to the Jomtien Conference on Education for All in
1990, and following the findings of studies conducted in the early
1990s and the national literacy survey of 1992 which showed that
adult basic education activities had almost ceased to operate, Tan-
zania had to reconsider the functional literacy approach. The country
adopted UNESCO’s concept of adult basic education as educational
provision to meet adults’ basic learning needs.² The government
designed Integrated Community Based Adult Education (ICBAE) in
1993 to increase access to sustainable basic education for adults and
out-of-school youth, through the development of a learner-centred,
community-based approach. Four wards were selected for the pilot
phase (Kiroka in Morogoro, Kishinda in Mwanza, Soni in Tanga and
Sembeti in Kilimanjaro). With financial assistance from the African
Development Bank (ADB), ICBAE was scaled up to another eight
districts in Tanzania. These were Masasi, Newala, Songea Rural,
Tunduru, Nachingwea, Liwale, Biharamulo and Kigoma.

In recognition of the positive impact of REFLECT methodology in
other countries, Tanzania decided to adopt the REFLECT approach
in the ICBAE pilot areas in 1998. In the same year, Action Aid Tan-
zania began undertaking a long-term community-based education
programme (Community Level Basic Education – CLBE) in two rural
districts (Kigoma Rural and Liwale) of Tanzania. The project was for
four years (1998-2002) and was funded by DFID.

² Basic learning needs include both essential tools (such as literacy, oral expression, numeracy
and problem solving) as well as basic learning content (such as knowledge, skills, values and
attitudes) required by human beings to be able to survive, develop their lives, make informed
decisions and continue learning.
The CLBE Project and Implementation of the REFLECT Approach

The purpose of the CLBE initiative was to enhance provision of basic education for poor people through the introduction of complementary, flexible educational initiatives linked to the formal school system of Tanzania. The focus was to provide basic literacy and functional skills to people aged between 15 and 50, with a special emphasis on girls and women. The project was taken as complementary to the key issues which the Ministry of Education and Culture (MoEC) was trying to address through the Education Sector Development Programme (Ed-SDP).

The REFLECT approach to adult literacy was a sub-component within the CLBE project, designed as a developmental tool to facilitate the 3Rs and to enable communities to realise that they were responsible for their own development. REFLECT circles were meant to be the nuclei for identifying and discussing community problems at village level and to offer opportunities to share, discuss and learn about practical issues that were important in people’s lives.

The REFLECT circles multiplied, with the result that the number of participants attending sessions and interest among educational officials increased. By December 2002 there were about 42 REFLECT circles (14 in Makata and 38 in Ilagala) with an enrolment of 1324 learners and 64 facilitators, as indicated in the table.

Table 1: Total number of adult learners and facilitators in REFLECT circles by December 2002

<table>
<thead>
<tr>
<th>Project Area</th>
<th>Learners</th>
<th>Facilitators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Female</td>
<td>Male</td>
</tr>
<tr>
<td>Makata (Liwale)</td>
<td>115</td>
<td>126</td>
</tr>
<tr>
<td>Ilagala (Kigoma)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Each of the REFLECT circles was managed by a committee of about five people. Members met at least twice a week for about two hours. Some of these REFLECT circles undertook projects in farming, gardening, carpentry, brick-making, dairy goat and poultry keeping as income-generating activities. Efforts were made to get the groups to move further and become more involved in exploring poverty issues. At times, the circles provided advice on community activities. For example, due to the failure of crop sales in one season in one of the project areas (Nambunju in Liwale District), the REFLECT circle suggested rehabilitating the road leading to the village. Villagers undertook this work and were able to sell their crops in the next season, because vehicles were able to get to the village.

Elsewhere, REFLECT circles mobilized villagers to clean well water, and in Makata village, REFLECT circles inspired the village community to start using bricks in construction of their houses, something which had not been done before, and the circle sold materials for the brick-making industry.

REFLECT relies on volunteer facilitators chosen from among men and women in the community who can read and write. The CLBE facilitators received a honorarium of Tshs 10,000 (equivalent to US $ 10) per month from Action Aid Tanzania. The communities were supposed to contribute the same amount or to give non-monetary support to the facilitators.

**Summary of Achievements of the Project**

Overall, the REFLECT methodology demonstrated positive results:

- REFLECT circles became focal points for discussion of community problems such as water, roads, soil fertility, health and HIV/AIDS, agriculture, and the factors causing poverty.
- Small-scale income-generating activities were initiated. These created an opportunity to explore effective collective action, which
would not have thrived in the migratory life style which had characterized the pilot project areas.

- Gender disparity was reduced among REFLECT members. Families learnt to share the work-load and to plan together in the best interest of the family. There is now increased confidence among women to participate in meetings, and talk in public. Women have become able to participate effectively in discussions, contest leadership positions and make their voices heard.

- There is increased awareness among people. They now know that problems are not God-given. This awareness is not the result of telling people “how things are” but a process whereby people learnt through experience, which allowed them to question their reality independently. One participant from one of the project areas had this to say: “REFLECT has indeed opened up our eyes. It has changed our attitudes and the way we look into things. Now we know that there is a lot we can do for ourselves instead of waiting for the government to do everything for us.”

- REFLECT circles were the best-organised groups in the villages, and could be used in the annual planning process and to analyse community problems.

**Issues to be Resolved**

The project was not free from challenges, however, which affected it negatively from time to time:

**Scale of projects in REFLECT circles**: although income-generating activities were initiated they were too small to have a serious impact on poverty: gardening, for example, or keeping 15 chickens for a group of 25 participants. If the REFLECT methodology is to achieve the expected outputs as a developmental tool, participants need to move into larger projects, but these need considerable capital investment and skilled, innovative and knowledgeable facilitators capable of leading the participants in critically analysing their problems, identifying viable projects and writing project proposals. Continued technical and material support is imperative.
The balance between literacy and other pressing community problems: although REFLECT methodology demonstrated the ability to assist communities to analyse, plan and implement community actions, the REFLECT circles were used more as a “social or community forum” than for literacy learning. Whereas the participants in the REFLECT circles appreciated the importance of being literate, they also felt that this alone would not solve their immediate pressing problems. They found it more urgent to learn how to design and run small income-generating projects. This is a big challenge given that Tanzania has to improve by 50% the current literacy rate from 68% to 84% if it is to satisfy the goals of the Dakar Framework for Action on Education for All by 2015. The gap that existed in 2000 is supposed to be halved. REFLECT methodology in its ideal form, however, is meant to help participants to tackle practical development problems, among which literacy may not be a priority.

Acceptance and ownership of the project by its beneficiaries (sustainability): in Tanzania, experience demonstrates that many donor-funded projects fail to continue once donor assistance is reduced or withdrawn. This project was community-based, and hence its ownership was supposed to rest upon the community. However, the impression from community members was that they were unsure whether they were truly ready to accept and take over the responsibility of sustaining the programme. Using its funds from DFID, Action Aid Tanzania provided technical support (training workshops) and allowances for facilitators – something which the local communities would not be able to sustain. An alternative would be for the district councils to take over these responsibilities. But this is also uncertain given that adult education activities in the country are currently inactive and receive little government support.

Recommendations for a Way Forward

Overall, it would appear that REFLECT methodology can, when properly implemented, be a viable vehicle for sustainable development. Through its process of analytical dialogue people learn not only to share ideas but also to realize that there is much they can do for and by themselves, even about what may appear to be insuperable
problems. However, REFLECT methodology is not a simple operation. Certain conditions have to be met for successful results, and these offer good lessons for Tanzania in its efforts to scale up REFLECT methodology nationwide:

**Social mobilization and advocacy**: REFLECT is still in its early development. As a new approach, it involves a significant change process and a new learning experience within the education system. Successful implementation depends on a number of interrelated variables including clarity about its meaning to potential users, the degree of difficulty experienced by users, and analysis of social conditions, and of planned and unplanned activities that may or may not influence the productivity of a given change. While Action Aid Tanzania has produced several documents in English and Kiswahili about the implementation of REFLECT methodology in Tanzania, the Ministry of Education and Culture needs to take a more proactive role in social mobilization and advocacy.

**Political commitment and government support**: REFLECT methodology needs considerable capital investment for recruitment of competent personnel and financial support to initiate income-generating projects. In a world of harsh economic realities and insufficient resources, government needs to revive its commitment to the adult education sector. Otherwise, the good philosophy of REFLECT methodology will remain merely on paper.

**A holistic multi-sectoral approach**: education alone is not a panacea for every problem. Poor communities have multiple interrelated problems calling for a multi-sectoral approach. The government and other interested parties need to look for alternative funding to allow more investment in diversified programmes that address other aspects of peoples’ lives such as HIV/AIDS and improvements in agriculture.

**Trained and skilled facilitators**: REFLECT methodology demands skilled, knowledgeable and innovative facilitators. Unfortunately, in Tanzania, adult education activities continue to rely heavily on untrained volunteer facilitators, most of whom have very low educational attainments, and on primary school teachers, who have proved to be unsuited to working with adults. The Ministry of Education and Culture
therefore needs to collaborate with ActionAid Tanzania to improve the capacity of facilitators and practitioners through training in REFLECT methodology, project identification, design and management, and in cross-cutting issues such as HIV/AIDS. Initial training should be followed up by in-service training at regular intervals and motivational incentives.

**Context-based REFLECT practice:** experience gained from Asian countries with a long tradition of REFLECT practice indicates that although literacy is always a key element, the emphasis differs from context to context. The local model may focus on literacy as a tool of empowerment, on community action or on human rights. Tanzania needs to learn from such experiences, and the REFLECT approach has to be modified to suit the social, economic and political realities of Tanzanian communities. In places where there is still high illiteracy, for example, emphasis on the 3Rs (reading, writing and numeracy) is recommended, while in other places the community-focused REFLECT approach could be adopted.

**Partnership and collaborative effort:** Action Aid Tanzania has clearly demonstrated that NGOs are making considerable efforts to address development issues such as education. By their nature and mode of operation NGOs work very closely with the target population and their impact is directly felt and appreciated by the communities. In this pilot project Action Aid was able to penetrate the remote and isolated areas of the country where government provision of basic education and other necessary social services was not available. However, sometimes NGOs are mistakenly perceived to be operating another, parallel system. There is therefore an urgent need for the government to recognise the role played by NGOs where they add value to development, and to coordinate them and work with them in partnership.
In this article, Professor Alan Rogers draws on his thirty years of experience of the field to describe what he has learned about the motivation which drives many men and women to struggle to master the skills of reading and writing. He outlines the implications of these motives for policy planners and literacy facilitators. Alan Rogers is Director of “Education for Development”, an independent development charity. He has taught at the Universities of Reading and Surrey, and is the author of the book “Adults Learning for Development”. This text is a revised and extended version of the section on motivation on pages 6:5-6 of “Widening Literacy: a training manual for managers of adult literacy learning programs” published by Save the Children (US), 54 Wilton Road, Westport CT 06680, USA, from whom copies may be obtained.

Alan Rogers

Adult Literacy – Adult Motivation

Trying to determine quite why some people wish to learn to read and write is important for all policy and programme makers as well as for those who teach them. For it is generally agreed that adult learning programmes, in order to be effective, must be based on the ‘felt needs’ of the learners. It is important to identify what the adult potential literacy learners aspire to, what their intentions are, if we are to help them to achieve those desires.
One traditional way of doing this is the missionary approach: to “get at” the potential participants and to try to “make them motivated”. Agencies often work hard to make non-literate adults feel inadequate, to help them to come to appreciate why they simply must learn to read and write, how their lives are blighted by being “illiterate”. Arguments which by now have become traditional (“you will never be cheated if you become literate”; “you cannot use medicines properly unless you can read the labels”; etc.) are used to help non-literate adults to appreciate how in the modern world they need to become like the literate population if they are to “succeed”. Illiteracy, it is often alleged, will confine them to a non-developmental future: “without literacy, there is no development”, and “literacy is the key to health, wealth and happiness” are two of the many slogans which bodies such as UNESCO have drummed into the heads of agencies which provide adult literacy classes. I well remember the question I was asked in Madras on my first visit to India thirty years ago by an adult literacy facilitator: “How do you motivate the learners in your country?” That concern still exists.

But it might be better to try to start with what adults already feel, what they wish to do – to take their existing aspirations seriously. It is surely important to help them to feel good rather than to feel bad about themselves, to start where they are rather than try to change their motivations first. And that means exploring in some detail just what these desires and intentions are. The area of motivation of adult literacy learning (as with other forms of adult learning) is still under-researched. It is of course highly localised. What will impact on one social group will often not move those in other social groups. We need much more localised research into the real motives of those who attend – and also the aspirations of those who do not attend.

Over the last twenty or so years, I have visited many countries and collected different statements from adult literacy learners in different contexts about why they were attending adult literacy classes. I am omitting those many participants who come, not to learn literacy skills but to be a member of a group which discusses common issues, or
those who come to learn other life-related skills such as income-generating skills or health skills. These are important motivations. But my concern here is: why do some people really want to learn literacy skills; why do they persist week after week with learning the skills of reading and writing different scripts and texts? It may be worth trying to sort some of these out so that we can see how these will relate to our teaching-learning programmes.

**Needs and Felt Needs, Aspirations and Intentions**

There are of course a number of problems in conducting such a survey. Many adult literacy learners will tell us what they believe we wish to hear. They see us as a representative of the major international donors – and they already know what such agencies feel about literacy. After all, it is the international agencies which created Education for All with its emphasis on statistical targets. It is the international agencies which have divided the world into two, the literate and the illiterate (900 million if UNESCO is right). It is the international organisations which speak about eradicating illiteracy as if it were a disease, of waging war on illiteracy as if it were an enemy, which talk incessantly of meeting the people’s “needs”, which the agencies can see clearly but which the people themselves often do not see. The discourse of needs is well known even in the smaller villages of Asia and Africa; and those we speak with repeat it back to us because they think that is the answer we want to hear.

But more seriously, many people have come to internalise it. They really believe that literacy is the basis of all else, that they lack it and that therefore they are really ignorant, unable to think and calculate and reason; in so many hegemonic ways they are made to feel deficient. They have come to ascribe to themselves all the negative attributes which such agencies assert belong inevitably to the illiterate. Like Adam and Eve, they have come to see that they are “naked” – a thing they had not appreciated until some external person or agency told them so.
Four Groups of Motivation

Trying to get past these two barriers is very hard – but it can be done at times, usually with a good deal of patience. And the result can be rewarding; for a pattern seems to emerge from such a survey. Taken together, I fancy I can see some four groups of existing motivations. There may of course be others which I have not identified, but these four seem to me to be important in determining the way we plan our programmes and teach the participants. I outline these four, not necessarily in any significant order.

1. There are what I call symbolic reasons. Some adults have told me that they have joined their classes, not because they want to use their new literacy skills but because they want to join “the literacy set”. Such reasons relate to social status. These people have a relatively clear picture of a world divided into two, the literate (actually in some contexts a minority but nevertheless very dominant) and the illiterate, an inferior race, ignorant and powerless. And they have joined an adult literacy class to transfer from one class to the other, to gain ascribed power. They feel that other people (especially the literate group) regard them with scorn because they cannot engage in the dominant textual communications. They often try to hide their non-literacy: “They look at you as if you are stupid,” as one participant in a Bangladesh programme told me. To avoid this scorn, they feel that it is worth all the effort of attending adult literacy classes and doing the work of the class. “Literacy” for them is not a tool to be used but a badge which will identify them as belonging to a particular group; it has symbolic value. This will affect their relation to the work of the learning programme. Their motivation to do the actual learning will sometimes tend to be relatively low. Indeed it looks as if some of these quite quickly find the classwork less than satisfying. It seems as if the effort and time required to help them to transfer fully from one group to the other are both too great to justify it. They have no clearly defined milestones to help them through, no stages by which they can measure their progress towards their final goal, no rewarding
intermediate objectives which can spur them on. And they see no actual use for their literacy skills after the end of the class – they simply wish to “belong”.

2. Other adults join for instrumental reasons. They want to learn literacy skills because they want to accomplish some literacy task. Several aspire to read the Bible or the Quran. “I want to learn to use the hymnbook for myself” was the comment of one literacy learner in Namibia – a daunting task which the literacy primer did not help her with, for the activity combines understanding various different forms of numbers (page numbers against hymn numbers) and reading a text set out in a particular order. Reading magazines was popular, but very few persons said they wanted to read the newspapers, except the film or sports sections. No-one has yet suggested to me that they are attending a literacy class because they wish to keep a diary (although several persons are engaged on that activity after completing their course).

What is surprising is that many of these tasks are seen to be writing tasks although most adult literacy learning programmes spend more time on reading than writing. Among the reasons given in India tend to be writing family or formal letters rather than relying on others (members of the family, friends and neighbours or even paid scribes), especially keeping in touch with members of the family overseas. Filling in forms is another such task frequently asked for – a bank loan or a housing grant application or a post office money form. Again this is a task which requires specific knowledge and skills such as the appropriate use of numbers and the skill of writing within a small boxed area, tasks which primer literacy classes rarely equip the literacy learners to do. Writing a job application was high in Kenya and in some other countries, again calling for special language and lay-out.

Several told me that they wished to draw up and keep accounts. But my experience is that those who really need to keep written accounts will find their own way of doing it, often very informal notes in a specially-made short-hand. I found one small shopkeeper who
kept a note of his daily transactions by scratching his own notes on his hand with a toothpick stick and asking his wife to write up the accounts in the evening when he got home. Others who say that they intend to keep their own accounts often do not in the end use the skills they asked for. In Egypt, a member of a literacy class ran her small millinery business without keeping written accounts despite the fact that the class had specialised in doing this kind of activity. I suspect that many of those who say they wish to keep accounts are repeating what the agencies have told them during motivational sessions.

Such motivations will of course vary according to the context of the learning group. Literacy classes set within an existing development group such as a credit and savings group or an environmental action project such as forestry users will see these tasks within the context of that group activity. A class in Bangladesh based on a men’s group running a taxi (tempo) service saw the literacy tasks as being keeping records of journeys, giving receipts, counting cash, and maintaining the vehicles. In other contexts such as the work-based literacy of Botswana, other instrumental needs could be seen. One man said that he wished to read health and safety notices as he had been charged with being safety officer in his workplace. Another had the chance to become a trade union official and wished to read and write texts appropriate to that work. These people will often come to classes with clearly set stages and end goals in their minds. They will normally learn fast when they see the work of the literacy learning programme as directly helping them with their desired literacy uses; they will learn much more slowly when what they are learning does not seem to contribute to the tasks they have chosen. They will often be able to identify their own milestones, and they will frequently seek and receive reinforcement of their literacy learning from engaging in their own activities. If they can see that the classwork contributes to their own purposes, then they will stay with the learning programme.

Perhaps among this group are those who wish simply to learn to sign their names – not to read what they are signing but just to sign in order to show that they are now “literate”. These participants will
often “switch off” when they have learned to do this or even stop attending the sessions. They have achieved what they want to do and as adults see no reason to continue with what they feel is a burdensome chore keeping them from more important activities. They may be seen by others as “drop-outs” but they will actually have completed the learning task they set out to do.

3. Thirdly, some adults join adult literacy classes, not to learn literacy skills for use but for the **opportunities** the course will provide subsequently. They come because such learning will open doors for them at the end. In Botswana, some said that they had joined because they could then get a driving licence. In some contexts, obtaining a loan is dependant on being able “to read and write”. In Nepal, some came to classes because with the certificate of literacy they obtained at the end of the course, they could become Community Health Volunteers. In various parts of the world, some adults see clearly that completion of a literacy learning programme in the dominant literacy would help them to obtain paid employment or get promotion in the workplace. This is not just the motivational propaganda of literacy agencies – for many people, it is very real. The jobs and the promotions are there but the literacy skills required are not.

As with those who come for symbolic reasons, these participants frequently do not intend to use their newly acquired literacy skills after the end of the course. Their goal is, however, more concrete than that of the symbolic participants. They aspire to obtain the very real benefits that completion of the learning course may bring to them personally. But like the symbolic participants, their goal is far away, after the end of the programme. Keeping them going through the whole of the course and providing them with milestones which they feel are relevant to their own aspirations will be difficult. These persons will tend to drop out more quickly and more often, and they will be less concerned to learn practical literacy skills than those who come for instrumental reasons.
4. Finally, many agencies stress that the main motivation for adults to come to literacy classes is to be able to go into a formal or non-formal educational programme; it provides access to further learning. This is a kind of opportunity motivation – the end of the literacy learning programme will open the doors of education to them; but it is also an instrumental motivation, for the literacy skills will be learned for use. They hope to use their literacy as an entry point into second stage education – for example, to get into school through their adult literacy classes.

My experience is that this is far less frequently a motivation for adults to come to classes. Very few of those over the age of 25 want to enter either formal or non-formal continuing education programmes with a set curriculum and equivalency qualifications. It is certainly quite common among young adults (those aged between 15 and 20, for example) and it appears to be more frequent among younger women than men. It is certainly true of certain contexts – it is immensely important in South Africa and Namibia, for example, where large sections of the population were denied any formal education or any effective schooling; these are now, for social and political reasons, not only demanding adult literacy but also adult continuing education on an equivalency basis. But it would be a mistake to take this as a model for everywhere. Most adults in other contexts clearly do not require or feel that they need socialisation education on a primary school basis, for they have arrived at a position in society. And only a very few adults feel that gaining some form of certification (apart from vocational qualifications) will add to their standing in society or increase their effectiveness.

For these persons, their aspirations will affect the way they see the adult literacy class work. They will learn quickly and happily if they feel that it is contributing to their goal to get into some kind of adult schooling after the end of the course. Their milestones will be the staging posts which seem to relate to the work of primary schools – especially tests and certificates provided at various stages along the route towards what they see as their goal.
Conclusion

There may be other kinds of motivation for adults to learn the kind of literacy offered by the various literacy agencies today. They will be very context dependent, so we need to look closely at the context within which our programmes are being offered to see what are the expectations of the participants in our programmes and whether our programmes will help to meet those expectations. But these four – the symbolic reasons, the instrumental reasons, the opportunity reasons and the access reasons – seem to be clearly present and distinctive.

However, we should not assume that such motivations will remain fixed for all time. As the programme progresses, such motivations can sometimes be seen to change. Someone coming for symbolic or opportunity reasons may become convinced of the instrumental value of literacy. But others will become discouraged and demotivated as the class does not seem to meet their needs.

Finding out the real existing motivations of our literacy learners is important for many purposes, especially for finding appropriate teaching-learning materials, and for setting goals and milestones (staging posts on the course to completing the initial programme, those breathing spaces when the progress made so far can be reviewed and some measure of satisfaction can be felt by teacher and learner alike) during the learning programme. Such milestones are the key elements in maintaining and developing motivation.

The task of discovering and keeping under review the existing and changing motivations of the participants falls of course on the literacy facilitators. This is one more example of the way in which literacy agencies frequently underestimate the complexity of the process of teaching adults. They seem to assume that anyone can teach literacy to adults and they provide a minimum of training and ineffective ongoing support for what is a very difficult task. Primary school teaching is the worst possible basis for training adult education tutors; for the
teachers in primary school are unused to taking into consideration the aspirations and intentions of the learners in their classes. Constant open discussion between facilitator/ animator and the learners is needed in adult education, not externally determined needs and an externally prescribed curriculum using externally prescribed learning texts. Engaging in such discussion is hard for inadequately trained, inadequately supported and often under-confident teachers.

For we must not imagine that the participants in our programmes are simply passive. All adult literacy learners will be judging their programme in terms of how far it will help them achieve their own aspirations and objectives – whether it will help them to move from one category to another in society; whether it will help them do the literacy tasks they wish to accomplish; whether it will open the particular doors they have set their eyes on; whether it will lead them to some kind of certification which will open the next door to their linear progress. Our programmes are being assessed by the participants shrewdly in terms of how far the activities being required of them are relevant to their own sense of purpose, their own intentions. While it is true that some adult participants continue for a long time in literacy classes out a sense of loyalty to the facilitator, even when they are bored and cannot see any purpose in the work, in the end if the class does not meet their purpose, they will stop coming. This is one of the key differences between adult learning programmes and primary schools. It is vital that all adult literacy teachers talk frequently with their learners about what the learners want and how far they are being satisfied. Motivation can be built up and destroyed so easily – but we need to know what it is before we can help to develop it further.
Illiteracy in German is a taboo subject, although the number of functional illiterates is estimated at four million. Only 20,000 students a year attend literacy courses at the Volkshochschulen. An e-learning portal is currently being jointly developed through ApOLL (Alfa-Portal Literacy Learning) by the German Adult Education Association and the Federal Association for Literacy, in order to provide functional illiterates with a world of learning via the Internet, to strengthen literacy in Germany and to make media skills a part of basic education. Christian Fiebig is Head of the Apoll Project.

Christian Fiebig

E-Literacy: Learning to Write via the Internet

A New Impetus for Literacy in Germany

At first sight the idea seems as odd as it is exciting. The Internet makes it possible to adapt to the learner’s times and pace of learning, to devise individual curricula and to let learners exchange views with each other. If functional illiterates can successfully be taught literacy using the Internet to supplement courses, the goal of the World Literacy Decade – a reduction of 50 per cent in the rate of illiteracy – will come a step closer.

On the other hand, how can illiterate people can gain access to a literate medium in order to take advantage of the learning available? We are convinced that this can be achieved.

Our conviction is based on two considerations. In the first place, the availability of the Internet is growing rapidly. Radio took 30 years, and television 14 years, to reach a level of nationwide use comparable to that currently enjoyed by the Internet. The Internet is thus on the way to becoming a mass medium. It is only logical for literacy work to make use of this technology in future.
At the same time, everyone is now familiar with computers at the workplace in modern industrialized societies. It is no longer adequate to be able to read, write and add up, and to have the basics of a foreign language – it is also essential to know how to use a VDU and a keyboard, displays and communications software in order to remain in touch both at work and in private life. Media skills must therefore become an integral part of basic education.

In Germany, 55 per cent of households are now online. To begin with, it was largely well-educated high earners who used the Internet. People of all backgrounds are now connected up: school pupils, senior citizens, men and women of all ages are regular users.

**Technical Equipment for Functional Illiterates**

The big question when the project began was nonetheless where the target group of “functional illiterates” would acquire the necessary media equipment, and how they would react to it. Together with the Volkshochschulen (adult education centres), the APOLL project surveyed over 1000 participants in literacy courses at 29 Volkshochschulen in 13 federal Länder between March and May 2003. The LuTA Study (on the Circumstances and Technical Equipment of Functional Illiterates)

![Willingness to learn from a computer](chart.png)
Illiterates) reveals the trends in this area for the first time. The result is encouraging: 43 per cent of the participants questioned stated that they were willing or very willing to learn at a PC, and 22 per cent already had private Internet access.

Other results of the survey show what educational careers and social consequences are associated with illiteracy: 61 per cent of those questioned had no formal school-leaving qualifications, and 71 had completed no vocational training. As a result, 41 per cent of the functional illiterates were unemployed and probably stood little chance of finding jobs in the future, given the increasing use of technology at the workplace. Another peculiarity of the target group, which may be typical of industrialized countries, is that 51 per cent were living
alone, while the proportion of single people in the whole population is only 15-18 per cent. This figure suggests that functional illiteracy is looked down on socially in industrialized societies, making it difficult or even impossible to form relationships. This is the start of a spiral of stigmatization and isolation, which literacy must play a major part in overcoming. Given the fear of being stigmatized, learning via the Internet seems a good alternative. Access is anonymous, no one has to own up immediately, and people can learn at their own pace.

**The Community as a Factor in Success**

E-literacy can only use technology as a tool, however. The key factor in the success of new e-learning provision will be networking between trainers. It cannot become a practical reality without constant co-operation between literacy course tutors. One of the main aims of APOLL is therefore to strengthen communication among trainers, who frequently work alone.

On 12 February 2003, the day when Kofi Annan proclaimed the World Literacy Decade, the project portal www.apoll-online.de therefore went live. This portal is specifically targeted at trainers working in literacy in Germany and gives daily updates on news and events connected with literacy, reading and writing problems, learning and e-learning. The sharing of knowledge is intended to bring together the world of literacy in Germany and to enhance its quality. The portal acts as a service agency, raising public awareness while also providing an area protected by passwords for course tutors to ask questions and
offer each other advice, to exchange the teaching materials that they have devised, to download images to make up information booklets, to take part in surveys and to chat with experts in education and literacy.

In Germany, 271 Volkshochschulen provide literacy courses taught by around 800 trainers for 20,000 learners. After just four months, over 200 course tutors have registered with the portal and are actively exchanging ideas. The project has thus reached its first objective. People struggling on their own locally can now make contact with each other, can get to know one another and can swap ideas and experiences. The trainer portal makes it possible to find people to talk to within the region and in other parts of the country, to discuss the particular problems of individual learners and to ask for help from colleagues who may be facing similar problems. At the same time, the portal is also a channel to discuss private interests such as holiday plans or good wines, since a community is a social phenomenon and should not be reduced exclusively to professional matters if people are to enjoy using it.

The APOLL Menu

The main task of APOLL is, however, to develop an Internet-based learning platform. The portal will deliberately be nothing like traditional school and will draw on areas of real life in designing learning. Learners will, for example, be able to set themselves weekly goals in their own online diaries: buying a travel ticket, using an automated bank telling machine, filling out a form or reading the news. The exercises in the syllabus for each learner will vary, depending on the type of learning and prior knowledge, and will assume about half an hour’s learning per day. The learning material will be presented through video clips, audio files and simple, self-explanatory graphics. Every exercise that a learner does will be evaluated online to assess learning progress and report back to the tutor and the learner.
There will be no set learning route; instead, this will need to be designed freshly for each individual, thereby achieving the best possible match with the learner’s level and speed of learning.

The overriding principle will be that of active experimentation with the system, which will allow for step-by-step learning. Stages can be missed out, however, and exercises repeated as often as the learner wants. Individual learning routes can be built up using learning modules, which will themselves be constantly updated through individuals’ active learning. Learning will become enjoyable and fun, so that the reward for solving a writing problem will go straight back to the learner. Learning will become an experience of constructive interaction and greater freedom.
In the South Pacific, sometimes it is assumed that education only started with the advent of schools introduced by the missionaries. However, there was a great deal of organised education occurring in the traditional societies of the Pacific before the arrival of the missionaries from the West. Akanisi Kedrayate reports on her personal experience. She is Head of the Department of Education and Psychology, School of Humanities, University of the South Pacific, and another article by her appeared in issue No. 58 of “Adult Education and Development”.

Akanisi Kedrayate

Learning in Traditional Societies in the South Pacific: A Personal Reflection

“Every society in the world has a culture which is transmitted from generation to generation through education. Education is the humanisation of people in society. Whether it is referred to as socialisation or enculturation, indigenous education or traditional, education is education. And as a human process, it is part and parcel of every human society.” (J. Ocitti, 1994)

Learning in Traditional Societies

In traditional societies in the South Pacific everyone in the community learned. Learning was an important process as it ensured continuity and sustainability of life. Whatever was learned in these traditional societies was very much related to their way of life, the resources they had and how these were used to meet needs of the family, the
extended family and the community. The practical application of skills and knowledge was very important. Learning was very much functional in the sense that what one learned was put into practice; otherwise the skill was lost.

People learned through either informal, non-formal or formal education.

**Informal Education**

In these societies, substantial amounts of knowledge were learned and skills acquired through informal education. Informal education is usually regarded as spontaneous learning by individuals as they interact with their social and physical environment in their process of everyday living. It is open to all members of the community—children, young people and adults. It is truly a lifelong process of learning. For the purpose of this article, informal education is non-organised, unsystematic and sometimes even unintentional worthwhile learning that accounts for the great bulk of a person's total lifetime learning.

Through informal education, children used to learn the knowledge, skills and attitudes required for everyday survival and living from their parents and elders. Everyone was expected to know the values, customs, rules and social norms of living: social relations, lineage, how to behave and the environment. Preparation of individuals for the roles that they would play in the family, community and society was crucial. Males learned the skills of fishing or farming, and females learned how to cook and look after the home. Most of the learning was done through observation and imitation.

Socialisation is an important process which helps the individual, who is assumed to be ignorant of the social environment, to learn the social knowledge and social skills needed to be accepted and integrated into the society. Through socialisation everyone can access “common knowledge and skills” required for survival and sustained social relationships. However, “closed knowledge and skills” can only
be passed down within the clan. In Fiji, for example, the knowledge and skills for canoe building are specific to the clan which builds canoes. Only in special cases may knowledge belonging to one clan be passed to an outsider after that person has proved loyalty and commitment. For example, a (male) person from outside who marries into a clan may be allowed to learn the skill of canoe building. Secrecy and protection of knowledge and skills are related to control, power and wealth. To have knowledge is to have power, and when you have power you can control others. When the knowledge and skills are put into practice, it is a source of wealth. For example, the women of my clan are skilled in weaving a special basket called “sova”. These special baskets are also used in exchange for beautiful mats made by clans from coastal or island communities. Also when special visitors come to the community these baskets are presented to them as gifts in exchange for food or gifts they may bring. In modern times these baskets are sold in markets and handicraft centres to generate income for our community.

Women who marry into our clan are never taught the skills to weave these baskets until they have proved their loyalty and commitment to the clan. I remember when I was young, I confronted my mother as to why an aunt was not taught the skills of weaving. I was told that she was a “vulagi” (an outsider) and if my uncle died she would return to her village. If she was taught the skill she would take the knowledge and skill to her clan and we would lose our source of wealth. At that time I did not quite understand what she meant. I thought it was very unfair and mean that the aunt was being left out while the local women (members of the clan) met and wove baskets. But now I can appreciate and understand what my mother meant then.

**Learning Gender Roles**

Learning of specific knowledge and skills is also related to the sexual division of labour. Each gender learns the knowledge and skills appropriate to its roles. For example, males learn how to farm, fish and hunt, while females learn domestic skills.
However, parents and elders at times purposefully teach their children certain skills. I recall when I was growing up at the age of 12, I was taught some skills in farming and fishing. I often participated in fishing expeditions with my father and male cousins. This was often unacceptable in the community. My father showed me how to dig yams: “When you dig yams this is where and how you do it.” I was told why I had to do it the way I was taught. Even though males only were supposed to learn the skills of farming and harvesting crops, I was allowed to learn these skills because I did not have a brother. I was the youngest in a family of three girls. Whether my father had wished I was a male when I was born, I never asked him.

My mother also taught me how to cook certain foods and the importance of using special leaves for wrapping up food. She taught me how to behave as a girl and a woman, what I should and should not do, who I should and should not communicate with. It must be admitted that I was often in conflict with the teachings of my mother because I was always questioning her why I was not allowed to do certain activities considered suitable only for boys. For example, I questioned her why I could not climb coconut trees. I was never provided a straight answer. All this learning was conducted at home or in the community.

Non-Formal Education

A lot of learning in the community consisted of short, organised programmes, usually punctuated by practice of what was being learned. One prominent feature of this was that it was geared to meeting the needs of specific groups. In most cases, these short education programmes were organised on request on a voluntary basis for individuals or groups with specific learning needs who had the time for such learning. This learning was organised, worthwhile and geared to a particular target group, and therefore, for our purposes, non-formal.

I recall that when I was growing up, some young women from the community wanted to learn how to weave mats. This was organised...
and the learning process took place in my home with my mother and paternal aunt as the teachers. Although some of them had been taught by their mothers, two of them had lost the skill because of lack of practice. The oldest woman (the aunt) in the group admonished them for not knowing how to weave, as it was expected that every woman should know the skill. Then she demonstrated while the two women observed. After observation they were told to weave. The teaching and learning process took three days, and at the end of it the women had mastered the skill of weaving. The test was that they were required to weave a mat each.

The teaching of traditional dances, which was highly organised and ritualistic, was another form of non-formal education. The teacher had specialised knowledge and skill, which had been passed down from parent to child. The participants were deliberately taught the skills of body movement and of observing the ritual that went with it. The participants followed the instructions carefully, and the test was the final performance to the chief and the other members of the community.

Adults and children also learned from traditional ceremonies and family or clan gatherings. I remember when I was young there were clan meetings held at our home. My uncle, the leader of the clan, presided and directed the discussions. There was often exchange of ideas and views on issues concerning the welfare of the clan. I used to learn a lot of things from these clan meetings although I was never allowed to speak.

Formal Education

If we regard formal education as structured, organised with special teachers, then it was certainly undertaken in traditional communities in the South Pacific before the advent of schooling.

Some highly organised learning, with special instructions given by elders, was provided for the young as well as for adults. Special buildings were also put up where teaching was given. In traditional
communities in Fiji, Papua New Guinea, Vanuatu, Solomon Islands and other Pacific countries, the initiation rites for young people when they reached puberty were organised formally. During this period the male youths were placed in a special building away from the village with knowledgeable and experienced elders. They were given instructions and training, and circumcised as a preparation for adulthood. The initiates went through certain ordeals to test their courage and adulthood.

In some of the small island states of the Pacific it was the women who were initiated. In Tuvalu a female teacher related that during puberty she and other young girls in the community were put in a hut and given only water and coconuts to eat. By undergoing this process it was assumed that they would acquire the strength and endurance to face difficult situations in their future roles as mothers. In that society, if there is famine, the husband and children are to be fed first and the mother eats whatever is left.

If learning is about continuity and sustaining of life then we can assume that it is happening all the time in the community in traditional societies among all groups: the young, adults and the elderly. However, much of this traditional learning has been devalued by the emphasis on modern education.

**A Personal Reflection – as a General Conclusion**

I cannot disassociate myself from my past and ignore the important values and norms that have shaped my life. I am what I am today because of my past. And yet, at times in my modern mind I am in a dilemma as to which part of my education has changed me the most. Is it my community education or the Western education? On the one hand, I want to say that the past is no longer relevant to the modern world of science and technology. But then, on reflection, no matter how much the modern world has to offer, I find myself escaping to my community quite often to recapitulate the positive teachings and values I have lost through modern education.
How can the new media be used sensibly and effectively in literacy courses in combination with traditional methods? Dickson M. Mwansa describes a literacy project which attempted this in India, Bangladesh and Zambia. He was himself involved in the implementation in Zambia and describes his experience. Dickson M. Mwansa was formerly Dean and Professor of Adult Education, School of Education, University of Zambia, and is current Executive Chairperson of the Zambian Open University, a private institution focusing on distance education. The paper was prepared for presentation at the Seminar of the Commonwealth of Literacy (Collit) Project, held at the Commonwealth Youth Programme, Africa Centre, Lusaka on 8 April, 2003. He has in the past contributed articles to Adult Education and Development, on Literacy and Theatre for Development.

Dickson M. Mwansa

Demystifying Learning and Knowledge: Extending the Scope of Literacy

Introduction

During the 1990-2000 decade the basic assumption was that investment in basic education would embrace adult literacy and illiteracy would be wiped out. Instead adult basic literacy was sidelined and
rather than decreasing, illiteracy is numerically and differentially on the rise due to increase in population, decline in quality of basic education and increase in the quality of literacy skills required in modern times (Wagner, 2000). UNESCO estimates show that by 2010 while adult illiteracy will globally go down by about 11% (from 885 to 856 million), in Sub-Saharan Africa it will rise from 140 million to 147 million (Muller, 1997). In 1995, of the 106 developing countries that reported literacy statistics only 54 indicated reductions in illiteracy (Chiba, 1996).

In 2000, the Commonwealth Heads of Government meeting in Edinburgh declared that technology could be used to enhance literacy. DFID shared this vision and committed British taxpayer’s money to an experiment in the use of information communication technology (ICT) in literacy in India, Bangladesh and Zambia. The experiment was co-ordinated by the Commonwealth of Learning located in Canada.

I worked on the Zambian experiment in the design of instructional materials, training of instructors and linking of print, electronic and traditional media to create a multidimensional learning design.

This article documents the experience of working on the project using both theoretical and hands-on techniques from inception to the end of the experiment. It focuses on the nature of the project, processes of knowledge construction, the social impact of the experiment and the lessons learnt.

**Nature of the Project**

The project ran for three years from 2000 to 2003 and was at national level jointly co-ordinated by the Ministry of Community Development and the University of Zambia and implemented at three learning centres. In selecting a centre, the project was guided by some principles that included the following:

- The centre should not be a new structure but an enhancement to an existing centre
- It must be a centre for multiple learning designs
Management must ensure multiple utilization and a sense of community ownership without being run by a committee. It should provide access to computers, internet connection and other support technologies such as printers, copiers, faxes.

Three centres, among those organized by the Ministry of Community Development and Social Services of the Republic of Zambia, were purposively selected. The chosen centres were located in rural towns for easy access to electricity and had some activity going on.

Each centre had satellite centres as well. The centres were used for imparting ICT skills while satellite centres relied principally on teaching literacy through print media. Each centre had three to four computers, a printer, video camera, digital camera, cassette recorder, fax, copier and scanner, and an internet connection.

Objectives of the project
a. To promote the value and assess the effectiveness of technology-based community learning centres in the provision of literacy training in reading, numeracy skills and use and operation of information and communication equipment
b. To train literacy workers to be knowledgeable in applying technology-based training models
c. To produce appropriate and quality technology-based training materials
d. To provide lessons for wider replication of use of ICT in solving literacy problems

Management
The project was managed at international, national and centre levels. At international level, a manager located at the Commonwealth of Learning in Canada coordinated the project. He interfaced with other levels of the project through internet and teleconferencing and field trips to the three countries. The manager was answerable to the DFID, which in turn reported to the Commonwealth Heads of State and Government Meeting.
At national level, it was co-ordinated by a National Steering Committee (NSC) comprising the Director for Community Development and his assistant, director and co-director of the project from the University of Zambia, experts in ICT and literacy centre and operations managers.

Below the NSC was created an Executive Committee comprising the project director, project co-director, who also was the expert in literacy, and an ICT expert. The two experts were responsible for training and design of instructional materials.

At centre level, centre and operations managers implemented the project. Centre managers were senior or provincial community development officers who played a supervisory role and reported to the NSC while operations managers were middle level staff within the Ministry also based at provincial levels. Operations managers were responsible for the actual teaching of the use of ICT.

**Process of Knowledge Creation**

The process of knowledge creation progressed in steps and was buttressed by work plans and budgets drawn up at centre and national levels, discussed and approved at international level.

**Identification of Partners:** the first step involved identification of key partners in the development of materials. Besides the Ministry for Community Development and Social Services, the Ministries of Health and Agriculture were central to development at grassroots level. They were requested to participate and they nominated extension officers. Thirteen extension officers took part in knowledge creation through workshops.

**Choice of Subjects and Themes:** the choice of subjects and later themes was influenced by findings from research studies that had indicated that among all materials used in literacy classes in Zambia (Mwansa, 1996), the primer on health and nutrition was perceived to
be the most beneficial. Equally, evaluation of the literacy campaign in Tanzania (Kassam, 1988) indicated that participants valued learning which made them gain knowledge about health and nutrition. Further, needs assessment using participatory learning techniques was carried out to assess other learning needs.

Extension officers identified three diseases (malaria, diarrhea and HIV/AIDS) and organic farming as the major themes on which the project could focus. Malaria was the number one killer disease in Zambia, followed by diarrhea and cholera, which annually affected large parts of the country during the rainy seasons; and the incidence of HIV/AIDS was quite high. Organic farming was a new type of farming that had been adopted in the country in view of damaging effects to soils caused by repeated use of chemical fertilizers.

Training: this was done for extension officers. While attending workshops, extension officers researched and shared some knowledge and skills on the nature and causes, and prevention of the diseases, methods of structuring instructional materials using the Freirian approach, psychology of adult learning and the use of ICT in learning. Working in groups, they prepared different units on their chosen themes and collectively produced the first draft of the primer on health with 21 units. Each unit was divided into generative themes. They also produced an instructor’s manual.

Written in English, the primer was later translated by University students into three Zambian languages used in the three regions where the centres were located. While the primer was skeletal, comprising the generative words divided into phonemic families, the instructor’s guide contained a lot of activities aimed at helping participants explore their environments, values and beliefs and share their cultures. The manual encouraged participants to tell stories, share and record music and dances and evaluate the use of local knowledge on causes and cures for the diseases. Each lesson was intended to last for two hours.
A further dimension of material production was introduction of a syllable board. The board was introduced to accelerate and enhance word creation. The board is similar to a draughts board square, in size and foldable in half. It was constructed out of plywood and canvas material. The top part of the surface was covered with a commercially printed grid comprising 50 squares each one centimetre in size. On the left edge of the board, were printed five vowels of the Roman alphabet for guiding word creation. Syllable chips of all the letters of the alphabet, made out of cardboard, accompanied each syllable board. The syllable board was intended to act as a bridge between print and electronic media. On it, learners practised division of generative words into phonemic families and creation of new words. The syllable board promoted learning in a play way.

Field Testing: this involved testing of the primer, instructor’s guide, the syllable board and also included training of instructors in the use of the materials. A picture form of an evaluation tool was used to assess prospective learners’ attitudes to the materials, comprehension of content and illustrations. Two hired literacy experts did field-testing.

The findings of the test indicated some flaws in language use. It also indicated the attitude of the learners to the syllable board. The translated versions of the primer were couched in urban language containing lots of loan words not only from English but also from other languages. In rural communities, this usage of language presented problems of appreciation and comprehension. The test further indicated that the syllable board created overwhelming interest in learning in that it integrated learning and playing.

Computer Enhanced Learning: after the field test, the transition to electronic media began. The lessons in print were adapted to the computer with the aim of speeding up further learning and assessing the value of using ICT in communities where ICT had never been used before. At this stage, print materials were only used to back up ICT in case of computer breakdowns or disruptions to electric power supply.
Computer-enhanced learning among centre and operations managers involved learning how to use and maintain ICT equipment in their care; how to send and retrieve email; how to adapt materials to Powerpoint and how to help participants use Powerpoint to read instructional materials.

Computer-enhanced learning among participants was stepwise: participants learnt the basics of how to manipulate the equipment (opening and shutting computers), how to write their names using Microsoft Word and to print what they wrote. Second, they learnt how to use Powerpoint to actually learn how to read. Computer-enhanced learning generated great interest in computer use among learners and attracted other learners such as secretarial staff in government offices.

**Linking Video and Traditional Media:** after print and electronic media, a link was established between video and traditional media or drama. Drama is a familiar and effective form of teaching that has been widely used in Zambian society. In traditional society, it is used for teaching the young coming of age how to live in the world. In modern times, it is strongly integrated in various forms of development work. The link between video and drama is rapidly growing.

In the Collit Project, the introduction of drama was twofold. It was used as a tool to evaluate the knowledge and skills the participants had acquired and for extension of learning to the surrounding community. The video was primarily used for recording the process and outcomes of play making and when toured, for dissemination of information to the community. The transition from drama to video was also stepwise.

At each centre, participants in literacy classes created three dramas on malaria, diarrhea and HIV/AIDS to demonstrate what they had learnt from the primer. Each skit lasted between 10 and 15 minutes. In this step, participants were supported by University of Zambia students of theatre for development who had been hired as research
assistants to facilitate the creative process. The next step involved performances in the community and holding discussions with audiences to assess the impact of the dramas. The discussions were followed by self-evaluation.

It was the triangular link between performance, discussion and evaluation of what was learnt that constituted an effective learning process. Through this, participants in literacy eloquently demonstrated deep knowledge of the social consequences of the diseases.

The video-recorded performances were edited by a professional videographer and later toured within the local communities. The instant consequence of showing the videos was that the performers, who were primarily women, emerged as heroines in the communities because they carried the messages through their images, and the demand to view the videos at different meetings (e.g. church, political) not related to literacy increased. The videos were used over and over to the extent of wearing them out.

**Linking the Project to Other Institutions:** the Collit project attracted participation by the Centre for Education of Rural People (CERP) based in the UK. CERP funded a research study to identify other learning needs, development of two print-based modules adapted to ICT and training of nine young people in materials production. The print-based materials covered organic farming and communicable diseases and were designed to be self-taught. Further, the materials were packaged into a disk and put on a website for increased use by others.

**Monitoring and Evaluation:** the project had two national evaluators and one international evaluator. National evaluators made periodic trips to the three sites and produced reports, which were shared among member of the NSC and the Executive Committee for action.
Achievements of the Project

The achievements of the project can be judged in relation to the objectives it set out to achieve as well as unintended effects.

First, the centres became focal points for organization of literacy, and distribution of information on health and agriculture. The module on organic farming became a self-teaching tool whose use has extended to many farmers in the three centres. It has found use in the other programmes.

Second, the project promoted horizontal co-operation among extension staff. The extension officers, from three Ministries (Community Development, Agriculture and Health), worked together at the centres and in workshops to prepare and test instructional materials which could be used in their work. This had not happened before. In the past, each ministry worked in isolation from the other.

Third, thirteen instructors were trained who can be relied upon to prepare instructional materials with confidence. They are young and from key ministries concerned with development at grassroots level.

Fourth, centre and operations managers have become quite skilled in the use of ICT and are able to generate more learning materials, which they can integrate in the literacy programme.

Fifth, the project resuscitated flagging interest in literacy work in the experimental centres. In all, 27 literacy classes were organized in which 651 people participated. The tests administered to assess the use of computers indicated that participants learnt some basic hands-on skills upon which further learning would be built.

Lessons

The experiment showed that introduction of ICT for training in reading and operation of information and communication equipment
was possible. This can be judged by the relative ease with which computer-enhanced learning was embraced in the print-dominated literacy programme. What slowed the speed and progress of technology use was disruptions to power supply and frequent computer breakdowns.

Training in the use of the computers brought new knowledge and skills to the operatives. Extension officers are now able to produce and package locally made materials.

The training for the ordinary people demystified the use of computers. At the beginning, it seemed that the participants would find working with computers unfriendly. The transition to the use of computers was aided by use of the primer and the syllable board. What was not guaranteed was sustainability of use of the acquired skills and continuous learning. This would require increased introduction of computers in the local communities. This area would require some external support because the government may not see this as a priority, in the same way that literacy has not been given much clout.

The project enhanced the capacity of local experts to manage and implement projects. While there were agreements on the purpose and objectives of the project, the design, implementation and evaluation were principally under national experts. This was different from many other projects in which national experts play only facilitative roles while ownership and control reside with external experts and funders.

Injection of a new project in an on-going project could have some disruptive effect. The CERP project had its own demands on time and, energy and had different expectations to be fulfilled to meet the mandate under which it was proposed.

The use of local people in creation of the video and dissemination of information could attract a large number of people to video because of the closeness of the source to the audience. The appearance
of local faces provoked curiosity and interest in the content of the videos among people in communities.

**Conclusion**

Acquisition of computer skills is not beyond the abilities of participants in literacy programmes and operatives at lower levels of government structures. It can be done if executed in a stepwise fashion by linking what is unfamiliar to the familiar. The familiar was print and the unfamiliar was the computer with its software. The major hindrance to the spread of the use of ICT would be equipment and trainers ready to do the work at reasonable costs.

The experiment was funded at levels which may not be replicated when the experiment is taken to scale.

**References**


The following article sets out to highlight some current developments in the interaction between the newly formed labour market and the vocational education and training system in Kazakhstan. Weak interaction between the two spheres is one of the major problems in the creation of a proper training system for the unemployed in the Central Asian countries. The Kazakh project is one of the few forward-looking models developed in recent years in this field. A. Semchenko is an expert at the European Training Foundation (ETF), Almaty, Kazakhstan.

A. Semchenko

The Labour Market and the Vocational Education and Training System: Possible Approaches to Cooperation

Why Social Partnership in VET?

In implementing the project “Social partnership in vocational education and training”, we put forward the following arguments:

● Social partnership (SP) in vocational education and training (VET) is an important factor in training skilled workers according to the requirements of the labour market, thereby helping to decrease the rate of unemployment and overcome poverty.

● SP in VET has been growing and becoming more and more important in Kazakhstan.

● The development of SP in VET requires the creation of an appropriate legal and regulatory framework as well as the involvement of interested partners working through formal associations.

● The primary social partners in the area of VET are state agencies, educational institutions and employers.

● The main objectives of SP in VET consist of updating existing curricula, improving standards of education, and training specialists in the occupational skills required.
One of the main obstacles in the way of developing SP in VET is the low interest among partners, who do not know the benefits of effective social partnership.

**The Legal Background**

The establishment of a new type of social partnership in the field of vocational education and training is based on the regulations and legislation adopted in the early 1990s, the early years of independence of the Republic of Kazakhstan. The first such legislation was the Collective Agreements Act of the Republic of Kazakhstan, adopted on 4 July 1992.

A little later, on 3 August 1992, the Government issued a decree on “Social partnership in the field of social-labour relations“, implementing the Act. The decree set the framework for establishment of sectoral tariff agreements.

In order to collate and consolidate the proposed general and sectoral tariff agreements between the Government of the Republic of Kazakhstan, trade union confederations and employers’ associations, the Government issued a decree on 24 August 1992 setting up a special committee and a national conciliation commission on the settlement of disputed collective labour demands.

In July 1993 the three major partners adopted a joint Declaration on the principles of cooperation.

In view of the importance of social dialogue, the President of the Republic of Kazakhstan signed a decree on “Social partnership in the field of social-economic and labour relations” on 14 December 1994. The decree provided for the establishment of a permanent dialogue between representatives of the parties concerned, and determined that it was necessary to conclude general, sectoral and regional agreements.
Since then, seven general agreements have been concluded in the Republic, the last of which was drawn up in 2002.

All this has served to create the regulatory framework for social partnership and contributed to the adoption of the “Social partnership in the Republic of Kazakhstan Act” in December 2000. The adoption of this law provided an institutional mechanism for social dialogue between the partners.

The situation changed after adoption of this law, which states in clause 4, article 17 that the issues of vocational training and retraining of skilled workers should be included in agreements.

From 2001 on, under this law, whenever an agreement is reached between the Government of the Republic of Kazakhstan, national trade union confederations and national employers’ associations (article 21), the Government is obliged “to arrange for the improvement of the training system for the unemployed and enhancement of the vocational skills of workers”.

In addition, according to article 80, the parties are to accept responsibility for implementing the law of the Republic of Kazakhstan on “public employment”, whereby “appropriate programmes of vocational training for the unemployed shall be developed and implemented“.

It should be noted that the Government has fulfilled its obligation contained in the first part, about training for the unemployed. As a result, Decree No. 836 was adopted on 19 June 2001. This regulates the organization and financing of vocational training courses, and improvement of occupational skills and retraining for the unemployed.

The rules describe the rights and duties of employment offices, educational institutions, employers and the unemployed during vocational training. According to these rules, local budgets must allocate the necessary funding for training for the unemployed. As a result,
19,800 unemployed people gained a new occupation or increased their skills in the Republic in 2001.

**The First ETF Project: “Social Partnership in VET”**

The implementation of a pilot European Training Foundation project to examine problems through National Monitoring Centres was one of the important steps towards the development of social partnership in the area of VET.

During this project three research reports were prepared: “Social partnership in Kazakhstan” in 1998, “Social partnership in Kazakhstan – the situation in 2000”, and “Social partnership in vocational education and training” in 2001. A number of training and fact-finding seminars were also held for civil servants, representatives of educational institutions and employers.

During the development of the project, the following activities were carried out:

- Creation of a Council of Experts within the Akimat (city council) of Almaty City as a regional social partnership committee of VET organizations, employers and local government. The practical activities of the Council were implemented through three working groups: the first group concerned itself with interaction between VET institutions and enterprises in order to update the content of vocational training, the second group was responsible for identifying the list of occupations for which there is a demand in the labour market, and the third group worked to develop entrepreneurship by training the population.

- The second component of the project was the organization of training courses for the Council of Experts working group dealing with interaction between VET organizations and employers as it developed national standards and criteria for vocational education and training.

- The third component was preparation of the report about the situation of social partnership in VET.
The experts made the following recommendations in order to stabilize and further strengthen cooperation:

- To review and gradually improve legislation in order to provide for good quality vocational education and training for the public, for jobs and for social partnership in this sphere
- To establish councils of social partners at national, regional and sectoral levels to coordinate action and to prepare the process of decision-making in the field of vocational education and training on the basis of the model developed for Almaty City within the framework of the National Monitoring Project
- To develop scientific methods of identifying the needs of different sectors of the economy for skilled and non-skilled manual and non-manual workers, taking into account the relative priority of sectors of the economy, geographical peculiarities and changes in the market, with the participation of the social partners
- To improve curricula and syllabuses, and standards of training, on the basis of the opinions and suggestions of specialists in the field
- To conduct regular research on labour market forecasting with all social partners and to inform all interested parties when necessary about likely future labour needs
- In cooperation with the social partners, to develop national and regional retraining programmes for 2003-2005 based on labour market requirements
- To organize seminars on interaction between the social partners in the field of vocational education and training at national and regional levels
- To develop measures to stimulate employers to carry out training programmes for their staff
- To conduct an information campaign to explain the need for social partnership in the field of vocational education and training

As part of the project “Social partnership in vocational education and training“, a survey of the most prominent social partners and the relevant national bodies in the country was conducted in 2001 on the further development of social partnership in VET.
Among those returning the 110 completed questionnaires were the Ministry of Labour and Social Security of the Republic of Kazakhstan and the Ministry of Education and Science of the Republic of Kazakhstan. Opinions on the question of developing a social partnership were expressed by 60 employers, including large companies in Almaty City, and by the representatives of academic institutions, public organizations and educational trade unions.

According to the survey results, all respondents essentially recognized the need to develop SP to increase the efficiency of vocational training and to balance needs and demands in the labour market. At the same time, different categories of respondents varied in their enthusiasm for SP: educational bodies 78 %, employment offices 73 % and employers only 22 %.

Respondents believed that public organizations, academic institutions and trade unions were not involving themselves in the process of social partnership in VET. In the opinion of respondents, the main issues which social partnership should address were the employment of university graduates (54% of respondents), the quality of training (36%), youth unemployment (31%), the forecasting of needs for trained workers in various occupations (28%), and the importance of improving training programmes in accordance with the requirements of modern enterprises (19%).

The majority of the people surveyed thought that it was necessary to create special bodies in the regions to ensure that partners cooperated: 82 % of respondents suggested a regional committee within the Akimat (the local municipal council). Others proposed the creation of structures which were independent of government: an advisory committee or a council of trustees.

According to a significant proportion of those surveyed, the essential way of guaranteeing effective cooperation by the social partners in VET was to develop an appropriate regulatory framework to govern
relations between the partners and to promote the implementation of ideas that were developed.

Thus, almost all participants in the survey noted the need for legislation to encourage employers to take part, in the form of tax incentives, particularly reduced tax on profits. It was suggested that legislative encouragement for public associations and academic institutions should be done through social grants.

Respondents thought (52%) that educational institutions should spearhead this work. They expected employment offices to be closely involved as well. According to respondents, employment offices had sufficient potential, but without close cooperation with academic research institutions (47% of the answers) they would not be able to do much in the way of labour market analysis and forecasting.

About one-third of respondents expected the trade unions to strengthen their positions on protecting the employment rights of young people. And the same number of respondents thought that if academic research institutions were involved, they would use their forecasting potential to train workers to meet the requirements of the labour market.

**Young People: Difficulties in Finding a Job**

According to 2001 statistics, 330,400 unemployed people were registered with employment offices, 19,800 of whom received training as mentioned above. Subsequently, 13,200 of those trained (or 66.6%) found jobs and 1,100 (or 5.5%) opened their own businesses.

According to statistics, between 70,000 and 90,000 graduates of basic and upper secondary comprehensive schools enter the labour market annually. These graduates have no opportunity of continuing vocational education, more than half of them become unemployed, and others can only expect low-skilled work. The worsening of condi-
tions in the labour market makes young people who have no voca-
tional training or previous work experience uncompetitive.

Analysis of the statistical data for graduates of years 9 – 11 reveals the 
basic obstacles in the way of social partnership in VET. In our view, 
these obstacles are as follows:
1. There is no strategy or plan for the development of social partner-
ship in VET.
2. The legislative and regulatory framework is not adequately devel-
oped.
3. In this regard, the involvement of the Ministry of Labour and Social 
Security of the Republic of Kazakhstan and the Ministry of Educa-
tion and Science of the Republic of Kazakhstan is unsatisfactory. 
They currently have little communication in the field of social part-
nership.
4. Participation by employers is weak, even though they should be 
the main participants of social partnership in VET.
5. There is a negative influence from economic factors, such as 
shortage of financial, material and staff resources, especially in 
the countryside and small towns.
6. There is an excess supply of certain occupations in the labour 
market (employers prefer to give jobs to skilled workers who are 
already trained, rather than putting resources into training and 
wasting time on partnership).
7. There is a prevalence of commercial interests in educational institu-
tions, which train workers in skills that are clearly not wanted and 
offer inadequate quality of training.
8. Educational institutions find it difficult to process information and 
enquiries from employers. The absence of well-established con-
tacts with the employment services is another part of the prob-
lem.
9. People are not proactive themselves. They tend to wait for the 
government to take charge and solve problems.

Under current government arrangements, training and retraining of 
workers in all forms of education and training depends on the financial
resources of the region, and the need for skilled workers is determined essentially at the regional level.

As a result, even by the late 1990s, some regions were not yet running training programmes. At the same time, a lot of private colleges were established in the cities. For a fee, students are able to obtain qualifications in professions such as the law, economics, banking, etc., which are already in excess supply in the labour market.

The main shortcoming of planning is the absence of national and regional forecasting, even for the short term, of the needs of the sectors of the economy for trained staff (skilled manual and non-manual employees). Such research is possible only with the active participation of all social partners and employers.

In the sphere of social-labour relations, the social partnership programme currently in place in Kazakhstan primarily covers remuneration and security of employment.

**New Challenges for the VET System**

However, vocational education and training of skilled workers according to the requirements of the labour market is one of major issues that needs to be discussed by the social partners at all levels. Not only educational institutions, but also employers, state agencies, parents and students have now come to realise this problem.

The legislative and institutional preconditions for the development of social partnership in the field of vocational education and training are now in place in Kazakhstan. However, social partnership in VET is still in its infancy. This can be explained by lack of experience among partners, poor communications and absence of trained management staff.

In countries in transition to the market economy, the general concept of education, and especially of vocational training, has changed. Mar-
ket relationships have forced education to follow market demands, which means that education and training should fit the requirements of industry and employers.

The factors associated with the labour market which directly influence the activity of vocational educational institutions are:

- Changes in the pattern of employment
- Changes in the job structure of the labour market
- Stiff competition because of private educational institutions
- The structure of the availability of trained workers in an open labour market, which acts as the basis on which student training is carried out

There is a gap between initial and continuing vocational training and the requirements of the labour market. The standards that were developed more than 15 years ago have become outdated, and skill profiles do not meet the requirements of employers. As a result, graduates of vocational training institutions often become unemployed, even when they have studied those specialities and occupations which are supposed to be in demand in the labour market.

Thus, vocational training is becoming part of a new system of social objectives and has the particular goal of producing new types of specialist who will be competitive in the labour market as soon as they finish training. To achieve this goal, it is necessary to reorganize the vocational education and training institutions. The directions of the reorganization are:

- To rethink the activities of VET institutions according to the requirements of the labour market
- To revive the social partnership system on an essentially new basis directed at cooperation between vocational education and training and the players in the labour market, i.e., employers’ associations, trade unions, employment offices etc.
- To integrate VET into the system of labour market monitoring. This system identifies labour market needs, new occupations which will be required in the labour market in future, the capacity of the labour
market, activity research, employers’ requirements for workers, skills and qualifications

- To coordinate the efforts of VET institutions and social partners in order to develop and improve new and existing standards of training

The first step towards reorganization of labour resources is to involve the vocational education and training institutions in the process of labour market analysis. It is also important to introduce trainers to the new technologies for the analysis and forecasting of labour market needs.

The “Analysis of the Labour Market” Project: A Successful Attempt

The project of the European Training Fund on “Analysis of the labour market”, developed and carried out within the framework of the Training Improvement Programme (Part III) in Kazakhstan was one way of carrying out the above tasks.

For the research conducted in Kazakhstan, a specific methodology and tools (questionnaire, research technology) were used, drawing on experience in Switzerland and Saint Petersburg. The work of Kazakh researchers and practitioners was widely incorporated as well.

It should be noted that the monitoring of labour market needs by educational institutions should not be regarded as a whim of employers or the management of educational bodies.

It is vital that the vocational education and training system should remain one of the elements of social protection of the future generation. The youth of Kazakhstan entering the labour market have the right to, and should receive, training for an occupation and the knowledge and skills which will guarantee their proper place in the system of economic relations, a job and a level of wages that will allow them to lead a satisfactory human existence.
The pilot research project “Analysis of the labour market” in Kazakhstan was devoted to defining:

- Employers’ quantitative and qualitative requirements for skilled workers to receive training in the national system of vocational education and training
- Changes which were necessary in order to meet standards of training for skilled workers that satisfied the job requirements of employers

The aims of the pilot project were to gather ideas for improving training curricula and syllabuses in specific occupations:

- To promote closer partnership between educational institutions and employers in response to employers’ requirements for specialist knowledge and practical skills
- To develop the methodology of labour market analysis in order to implement constant monitoring in the future, taking into account employers’ demands in terms of occupations and skills

As an object of research we chose occupations which were in demand in the labour market, represented a continuously developing sector and had curricula which needed to be updated in the light of new technologies and more complex skills. The food sector was therefore selected, and more specifically the job titles “cook” and “confectioner”. In Almaty, training in these occupations is carried out at Vocational School No. 18, and in the city of Chimkent at Vocational Technical School No. 6.

One of the research methods was a survey, using a questionnaire distributed to employers in the economic sector selected. Overall, 95 employers were surveyed in the food services sector, 70 of them in Almaty and 25 in Chimkent.

The labour market research project had the following stages:

- **Stage 1 – June 1999** – preliminary selection of economic sector, questionnaire, research topics, selection of work group.
Stage 2 – July 1999 – pilot project mission of the EFO external advisers (Mr Lareh Anderson and Mr Sergey Ivanov), coordination of the sector selected, research topics, questionnaire, presentation of work group and educational institution; final selection of economic sector and research topics; organization of seminar by external advisers with participation by experts and representatives of the VET system.

Stage 3 – July 1999 – working out of technical project, questionnaire for employers, list of employers, printing of questionnaires; organization of instruction meeting with the work group about questionnaire methods, supply of questionnaires, diaries, letters to employers.

Stage 4 – August 1999 – questionnaire survey of employers, overall monitoring of survey, development of program for automatic questionnaire processing, collection of questionnaires, organization of data, coding, data input on computer; mission by the external advisers of the project.

Stage 5 – August/September 1999 – development of models for tables, algorithms for mathematical processing, machine processing of questionnaire, development of tables; preparation of recommendations to improve curricula and the report.

Stage 6 – September/October 1999 – completion and printing of report; development and implementation of final conference.

Initial Conclusions

Under the new labour market relations, the labour market and the vocational education and training market are closely interconnected. To function well there is a need for cooperation between vocational education and training institutions and employers in the field of research into labour market demand, so that curricula can be improved in response to employers’ labour requirements. The methods of labour market research may differ according to employers’ requirements for trained workers. In the report referred to above, the research was carried out through interviews with employers, using questionnaires. The methodology of research can be further improved.
According to a recommendation of the work group, the wish to include too many questions in the questionnaire complicated the employers’ survey. Despite this complexity, it was possible to achieve significant results.

Employers’ requirements for young trained workers were determined by assessment of the importance of industrial operations – the need for staff to possess the skills of cook and confectioner. This included evaluation of the significance of the spread of new techniques as new technologies develop.

Employers’ main functional and personal requirements of young trained workers were identified. It was also demonstrated that employers give preference to young workers with vocational training and appropriate work experience when recruiting cooks and confectioners.

The rate of remuneration for work, and the need for skilled workers in organizations participating in the survey, were identified.

Employers were found to have a positive attitude towards cooperation with vocational education and training institutions, and to be willing to participate in further market research in order to improve training curricula and syllabuses.

The research revealed the following current trend in social partnership in the sphere of vocational training: educational institutions are taking the initiative to contact and interact with employers.

Thanks to the project, educational institutions, in particular Vocational School No. 18 in Almaty, and Vocational Technical School No. 6 in Chimkent, established new contacts and strengthened existing contacts with social partners in the vocational education and training market.

The results of the research are already reflected in practical activity, in the form of changes to curricula and syllabuses.
2003 was the European Year of People with Disabilities. The United Nations (which has a separate website for people with disabilities) has set up a working group to draft an International Convention on the Rights of Persons with Disabilities. What role should adult education play in this? How can people with disabilities be integrated? Dr Peter Radtke, born 1943, actor, writer, Secretary of the “Disability and Media Committee” and member of the National Council of Ethics worked in this field for many years. He suffers from osteogenesis imperfecta – brittle bone syndrome – and was head of department responsible for the “Programme for the Disabled” at Munich Volkshochschule from 1977 to 1984. He is interviewed by Dr Peter Brandt (DIE). We publish this paper by kind permission of “DIE Zeitschrift für Erwachsenenbildung”, the journal of the German Institute for Adult Education.

A Look at Adult Education and Other Fringe Areas with Peter Radtke

“Our Lives Are Invariably Some Form of Compromise”

DIE: For seven years you were responsible for work with people with disabilities at Munich Volkshochschule. What did you discover in that time?
Radtke: People don’t differ fundamentally in their interests, whether they are disabled or not. Some need particular forms of assistance and support. I introduced cultural history tours, with the appropriate guidance and commentary. These programmes were not some kind of special education but “cultural visits” – with the emphasis on “culture”, not Sunday afternoon outings with care workers.

DIE: How did you manage to keep the care aspect to the minimum?

Radtke: We provided something for everyone. I think the main thing was that I demanded sacrifices also from disabled participants. They had to wait, for example, if the non-disabled wanted to look at a castle that was difficult to walk round. The visits had to be attractive to both sides, and were based on a shared interest in the topic. Our lives are invariably some form of compromise. We only had two permanent staff on each tour. Since there was a relatively large group of disabled tourists, this meant that the non-disabled participants, who had paid the same as the disabled, had to help out. And that worked well because there was enough interest on the cultural side. They did not get the impression at any point that they were there to look after a disabled tour group. As far as I was concerned, the cultural visits were completely normal.

DIE: Are people with disabilities a “target group”?

Radtke: I discovered that there needs to be special provision for those affected. In courses such as “English made gentle and easy” or “German made gentle and easy”, we always told the teachers to have regard primarily to the disabled students, although we kept the course open for non-disabled students, and there were always a few who enjoyed attending these courses because a “normal course” was too complicated or too fast for them for one reason or another. Aiming at something based on a shared interest always makes more sense than saying “Go along because that’s where the disabled are.”
DIE: What would you suggest to people planning provision today in a continuing education institution? Should they put the emphasis more on integration and abstain from special provision for the people with disabilities – in the hope that they will take part in other courses? Or is it better to create special provision for the target group “people with disabilities” – further sub-divided into a large number of smaller groups? That would again lead to segregation.

Radtke: I don’t think it should be turned into an ideology, since integration comes gradually. People unfamiliar with education first of all need a safe space in which to learn. Over the course of a year or eighteen months, however, it should be possible to break up this safe space and to make it into an integrated learning space. It is asking too much of many of those affected to force them to integrate straight away, although we should not of course lose sight of the goal of integrating people with disabilities into perfectly normal courses.

DIE: What distinguishes adult education from special education?

Radtke: Adult education has to offer a second chance, which special education cannot do in practice. This means that many people with disabilities, particularly those who are restricted intellectually, only reach maturity and the ability to learn at an age when they are beyond school education. In this case, adult education is required to pass on knowledge which others have acquired earlier. My criticism of special education is that it often papers over unemployment among people with disabilities. If it is clear that someone is highly unlikely to be integrated into a normal job, an earlier start should be made on preparing him or her to use leisure time more productively. What usually happens is that subjects are taught which will be of no use later on. This, then, is a task for adult education: to prepare for things such as reading the newspaper, taking advantage of cultural activities, visiting museums – making sensible use of endless free time.

“Preparing to make sensible use of endless free time”
DIE: Adult educationists have been keen to embrace the notion of self-directed learning. This idea means abandoning the same subject-matter for all so that learners seek out what they want to learn for themselves. How do you view this development?

Radtke: I no longer follow this debate actively, but I can see that one very interesting issue arises: the more self-direction, the greater the chance to develop into an emancipated personality. People with disabilities are particularly heavily influenced by their surroundings, especially in terms of values. The values of the non-disabled are held up to them as worth striving for, although these can never be translated in their case into realisable goals. A “self-image” actually based on disability would therefore be a considerable emancipation.

DIE: So the notion of self-directed learning would to some extent be “disability-friendly”. But it should not be overlooked that it is often used for neoliberal ends. The propagation of self-directed learning sits well with the principle of taking responsibility for oneself: “You’re responsible for yourselves, so learn what you need to market yourselves!”

Radtke: For many that would be far too emancipated an approach. Especially if they have been in institutions, many will not have learnt to decide for themselves what to learn. And if we want to reach people with very little experience of education, we must also have regard to those with learning difficulties and the so-called mentally disabled.

DIE: …which would be a particular task for “educational counselling”.

Radtke: When we talk about educational counselling, we have to ensure that there are counsellors who know about the process that people have to go through. Self-learning can only be the outcome of a process. Saying yes to one’s own disability and to a lifestyle necessarily resulting from that disability is one such process. I don’t know whether adult education always supports this
process in the right way. In many courses the false impression is still given that all people need to do is to “learn well, and you can easily melt into the world of the non-disabled”. Adult education needs to be more concerned with integrating disability into the personality. I cannot see many courses at Volkshochschulen nowadays like those of Ernst Klee in Frankfurt in the 1970s. They did aim at this kind of emancipation: not forcing those with disabilities into alien roles, but making them aware of their disabilities and releasing energies which could also lead to political action. The “Cripples’ Movement” grew out of these courses, although it may be right that this should have faded away today because there is now an entirely different social climate.

**DIE:** What “social climate” is there today?

**Radtke:** ...increased stress on performance, under the guise of a liberal attitude. The gulf that used to exist between those without and those with disabilities has shifted today. It now runs between those with disabilities who can be integrated and those who cannot. It has become possible to integrate many people with disabilities with the use of technical aids – computers and so on. The gap between them and those who lack intellectual or motor capacity has widened. The problem is that those who are able to express themselves automatically come to the fore in the public arena. However, if we take adult education as a whole, the emphasis ought in fact to be on those who cannot express themselves.

**DIE:** That may be a problem when there is greater stress on demand.

**Radtke:** The more exactly a group is specified, the smaller is the relevant clientele. This is doubtless a financial problem.

**DIE:** In this social climate, I can see two opposite trends: on the one hand, Section IX of the Social Security Code has been amended to encourage greater participation, and there is a debate in the United Nations about a Disabilities (Human Rights) Convention. And on the other hand is the bioethics argument.
Radtke: In crude terms the social consensus is that everything should be done to make life easier for those now alive. But at the same time we should prevent more people with disabilities coming into the world. Many of those involved do not see through this mechanism; they focus only on the improvements and achievements for those now alive and do not see that the danger lies elsewhere, in the right to life.

DIE: Is that a responsibility of adult education, to point this out?

Radtke: It is certainly a responsibility to raise awareness of the background. The disability movement is too concerned with Now and Me, and pays too little attention to the consequences for the next generation, for the people with disabilities who are not yet born. In all of these ethical issues, individual advantage comes up against the common weal. I am often asked whether I am against medical developments which relieve the sufferings of the individual. I reply that it is easy to say that people should be helped. But we have to consider the effects on society as a whole if certain things are forced through. Not to mention the fact that visionary research does not generally benefit those now living, even if it does the next generation.

DIE: Writing and acting have played an important role in your life. Do you see links with adult education?

Radtke: In my acting career in particular I have had a lot to do with adult education. One of the first courses which I introduced as head of department was drama, although I then took part in it rather than teaching it. This discovery of drama was crucial to the development of my personality, though I wouldn’t use the term therapy. Therapy regards art and culture solely as a means to an end. If you notice that what you do also has an effect on the public or the reader, then it is no longer something that only concerns you alone but also a third party. Naturally I would like there to be as many courses of that type as possible in adult education, but from the standpoint of art, culture
and creativity and less from that of therapy. People with disabilities in fact have a creativity that many non-disabled authors and composers actually long for and seek to acquire artificially. Take a book by someone with autism: the style of the language would come across as completely bogus if anyone else were to write it. Disability and art and culture hang very closely together. Perhaps it is wrong to speak of “disability” in the case of artists, but rather of creative phases. We know that among people who are mentally ill, their creative achievements are greatest when they are in crisis. It is then, when they are in greatest disability, that they are most creative.

**DIE:** When you say that it may be wrong to speak of “disability” in the case of artists, you are taking us into the argument about terminology. Is it proper to talk of the “disabled”, or is “people in need of assistance” more appropriate? We can make serious mistakes by using certain words, and cause offence. Have we found the golden mean between clear speech and political correctness?

**Radtke:** Let’s take the offensive word “cripple”. People in one section of the disability movement called themselves that and founded the “Cripples’ Movement”. It therefore depends on who says something. And then the context is important: “Hallo, my old crock” suggests contempt, but it may actually mean “you’re a good-looking bloke”. I am very suspicious of political correctness because I believe that too much emphasis on terminology is essentially counter-productive. It’s a bit like a millipede, wondering which foot to put first. As soon as it does so, it loses self-confidence. If I need to start worrying about whether it’s right to say “So long, see you” to a blind person, then political correctness has only widened the gulf. I don’t mean that language is unimportant, I would merely like to make it a less sensitive issue. The right words do not necessarily lead to the right attitude. Of course there is much argument about the expressions used in the context of disabled people. But while there is a negative image attached to people with disabilities, you can call
them anything positive that you like; sooner or later it will acquire negative connotations.

**DIE:** ...an example?

**Radtke:** I was at a conference in Athens, where British colleagues refused to speak of “people with disabilities” and talked about “disabled people”. About a fortnight later I took part in a radio broadcast in Austria. A listener called in and asked us not to use the term “behinderte Menschen” (disabled people) but “Menschen mit einer Behinderung” (people with a disability). In each case, the speakers regarded their own term as emancipatory. Instead of worrying over much about finding positive terms, we should try first of all to avoid clearly negative expressions.

**DIE:** Can you laugh at disabled jokes?

**Radtke:** To be perfectly honest, I can laugh myself silly at jokes about disabled people. Especially when the people concerned crack the jokes – very macabre and black. There’s a big difference between people sending themselves up and others doing it for them. But I know that some colleagues find it extremely offensive, so that one has to be careful. And because society is not yet free of prejudices against people with disabilities, such jokes can encourage those prejudices. It also makes a difference whether I make a joke like that in Britain or Scandinavia, or in Germany. It depends entirely on the atmosphere in which the joke is received. Where people with disabilities count as citizens with equal rights on their own account, there is less danger that jokes about them will be perceived as discriminatory.

**DIE:** In your present role as Secretary of the Disability and Media committee, you produce films and discuss with people, including those concerned, the roles and functions that people with disabilities are given in the media. What is the main issue for you?
Radtke: To many people, film, television, radio and the newspapers are the only channels through which they learn anything about the lives of people with disabilities. It is therefore all the more important to ask what is conveyed. In the last few decades we have in fact experienced an extraordinary transformation. Disability used to be either totally barred or shown negatively or as deserving of sympathy. Those directly affected are now often seen in the media. And fewer extreme images are presented – Batman or beggar. So there has been a change. When we sift through the media and assess them critically, we ask whether the examples shown reflect reality, present clichés or are required by the genre. People with mental disabilities often complain that the murderer in a crime film is usually a psychopath. The genre calls for a cliché and does not necessarily tell us anything about reality. We need to contrast clichés with the everyday lives of those concerned.

DIE: Does your committee take part in the discussion about media in education?

Radtke: We spend far too little time looking at theoretical questions. But then, media experts still devote too little attention to the topic. And if it is raised, this is usually by sociologists or those working in special education. We are trying to bridge that gap.

DIE: Thank you for talking to us.
The successor conference to CONFINTEA V (Hamburg 1997) was held in Bangkok from 6 to 11 September 2003. The aim was to arrive at an interim assessment of what had been achieved since Hamburg and whether the goals set had been met. The groundwork was also to be laid for CONFINTEA VI, to take place in 2009. At CONFINTEA V in Hamburg, the IIZ/DVVV was responsible for Theme 10, “Enhancing International Cooperation and Solidarity”, on which topic it conducted a workshop led by Prof(H) Dr Heribert Hinzen, Director of the IIZ/DVV. The invitation and programme, together with results and recommendations, are to be found on the pages 149 and 151. The “Synthesis Report of the CONFINTEA V Midterm Review” published by the UNESCO Institute for Education (UIE) gives a complete overview of the period after 1997 and sets out the challenges for the future. We reprint this text on the pages that follow by kind permission of UIE.

Synthesis Report

Recommitting to Adult Education and Learning

Preface

The Midterm Review of the Fifth International Conference on Adult Education (CONFINTEA V) brought together over 300 representatives of Member States, including ministers and senior-level officials, and agencies of the United Nations system as well as non-governmental
and civil society organizations and academic and research institutions from more than 90 countries in Bangkok, Thailand, from September 6 to 11, 2003.

Organized by the UNESCO Institute for Education (UIE) in collaboration with the UNESCO Asia and Pacific Regional Bureau for Education and with support from the Department of Non-formal Education of the Ministry of Education of Thailand, the Review was aimed at tracking goals accomplished and difficulties encountered over the past six years in executing the CONFINTEA V agenda. Through a series of thematic workshops, regional reviews and plenary sessions, it examined recent trends and new developments in practices and policies of adult learning and education.

In looking forward to the CONFINTEA VI Conference in 2009, the Review was designed to propose strategies for the advancement of adult learning to be followed in future programs. It also sought to ally more closely the CONFINTEA V agenda with the Dakar Framework for Action and the United Nations Millennium Development Goals.

As a synthesis of the Review proceedings, this Report outlines the major issues and key recommendations which emerged during the six-day meeting. The participants were unanimous in calling for renewed commitment, sharing of national and international resources and creative partnerships in adult learning. We hope that UNESCO and all stakeholders in adult education will take our Call for Action and Accountability to heart in affirming the joy of adult learning.

Justin Ellis
Chairperson of the Governing Board, UNESCO Institute for Education

Introduction

The Fifth International Conference on Adult Education (CONFINTEA V), held in 1997, looked ahead to the world’s transition to the new millennium by identifying adult learning as a key to the twenty-first century. The Hamburg Declaration on Adult Learning adopted there forcefully expresses the vital significance of adult education and learning by
identifying its potential “for fostering ecologically sustainable development, for promoting democracy, justice, gender equity, and scientific, social and economic development, and for building a world in which violent conflict is replaced by dialogue and a culture of peace based on justice”. These are goals reflecting the fundamental role of education in instilling respect for human rights and basic freedoms, in supporting progress in the diverse spheres and dimensions of human life and in encouraging care for the natural world in which we live.

Events which have occurred around the globe in the past six years: matters of profound social, political and economic consequence, many of them exciting, others profoundly disturbing, commonly confirm, if nothing else, that adult education and learning represent one of the greatest promises of our time – a promise which must be kept.

The Midterm Review Meeting, attended by over 300 participants from more than 90 countries, composed a systematic effort to determine how recommendations made at CONFINTEA V have been implemented and its commitments met, examining activities carried out worldwide in the field of adult education and learning since 1997.

A series of thematic workshops addressed the basic contexts of and manifold approaches to adult education and learning, including: Democracy; Poverty; Literacy; Work; Gender; Health and the Environment; Higher Education Institutions; Documentation and Information Networking (ALADIN); Teacher Training and the Quality of Adult Learning Programs; Monitoring and Evaluation; Museums, Libraries and Cultural Heritage; Information and Communication Technologies; Persons with Disabilities, Indigenous Peoples, Refugees and Migrants, and Prisoners; and, finally, International Co-operation and Solidarity.

Five sessions were held on regional reviews (Africa, the Arab States, Asia-Pacific, Europe and North America, and Latin America and the Caribbean) conducted by UNESCO Regional Bureaus and other regional partners as well as networks of the UNESCO Non-governmen-
tal Organization Collective Consultation on Education For All. A synthesis of 50 country reviews submitted by the National Commissions of Member States following a common grid was presented along with the findings of the International Council for Adult Education (ICAE) resulting from assessment studies carried out in 16 countries.

In highlighting major issues in adult education and learning, four working groups were devoted to: Rethinking of and Advocacy for Adult Learning in the Light of International Agendas; Policy: Structuring, Finance, Partnerships; Monitoring Adult Education; and Increasing Participation in Adult Learning. In a concluding round-table discussion, representatives of the United Nations Fund for Population Activity, the European Union, the German Ministry of Education and Research, the World Bank and a former Latin American Minister of Education spoke to the foremost challenges facing adult education and learning in today’s rapidly changing world.

The final session focused on the discussion of the draft report of the Review and the Call for Action and Accountability. Numerous contributions made by the participants have helped sharpen many of the formulations found in this Report.

The New World of Adult Education and Learning

CONFINTEA V acknowledged that economic, political and social imperatives related to profound structural transformations occurring around the globe have been driving the new concern for lifelong learning. But the goals set and commitments made in The Hamburg Declaration and The Agenda for the Future have not been fully implemented and accounted for. Compelling changes engendered by the forces of globalization and technology coupled with already existing development problems and far-reaching demographic factors, moreover, are fast creating new conditions of inequity and violence to which adult learning must urgently respond. These conditions especially influence issues of poverty, literacy, democracy, gender and health and the environment.
Poverty remains both a barrier to learning and a consequence of insufficient education. An estimated 1.2 billion people – one in five of the world’s population, two-thirds of these being women – live in abject poverty, wanting adequate food, clean water, sanitation, health care and education. One-third of all humanity survives on less than US $1 a day. The dominant market forces shaping economic development-practices have led to unacceptable levels of poverty severely affecting women and children in particular.

Seventy percent of the world’s poor are female; in the least developed countries, fewer than four out of ten women can read or write, compared with six out of ten men. Although in areas stricken with poverty women produce most of the foodstuffs, they still have only a limited voice in community decision-making.

Along with the needs of the urban poor and underprivileged, those of rural communities likewise have received insufficient attention. Indigenous populations suffering from low levels of literacy and life expectancy are especially subject to human rights abuses as they struggle to maintain a hold on their cultural identities, land and resources.

Migration across borders, whether voluntary due to economic reasons or forced by conflict or war, is growing. The lives of many political and economic migrants and refugees are infracted by poverty, ill health, illiteracy, disability, gender inequity, xenophobia, racial profiling and social exclusion.

Ten percent of the world’s population are persons with disabilities. Yet less than ten percent of children and youth with disabilities have access to some form of education, while the majority of adults with disabilities have not received any education at all. Poverty is both a cause and consequence of disability, with 50 percent of disability problems linked to poverty.

Unless there is greater direct action, it is likely that 28 countries will not meet any of their United Nations Millennium Development Goals by
2015. Confining basic education to primary education will not suffice for helping the majority of the world’s poor overcome their poverty.

From a political perspective, there is evidence of widespread erosion of democratic processes attended by declining respect for human rights – whether in the name of national development or international security. Nonetheless, a number of nations have reported growing efforts to promote a rights-based approach to learning. They refer to measures taken for encouraging democratic practices and for locally producing and employing learning materials enabling learners to carry out their own analysis of the world. Learning programs have been designed which aim at challenging dominant development models, at redefining power relationships in both the public and private sphere and at facilitating recognition and encouraging the use of existing local knowledge.

Meanwhile, the rapid spread of HIV/AIDS threatens to eradicate gains made over the last decade along with advancements in health and nutrition in decreasing mortality rates and increasing life expectancy. The educational dimensions of other causes of death and devastation such as malaria, multiple drug-resistant tuberculosis and dysentery also remain inadequately addressed.

Paralleling the worldwide deterioration in health conditions is the continued depletion and destruction of natural resources – from pollution and global warming to desertification and water insecurity.

The situation is urgent in all regions of the globe. Nearly 70 percent of the world’s illiterate, of which almost two-thirds are women, are found in Asia. Millions of children drop out of primary school each year for poverty-related reasons, while many of those who remain and complete primary school can barely read and write. Yet the recent United Nations Development Program Human Development Report (2002) shows that Asia has taken steps towards universalizing literacy and providing access to basic education, both for youth and adults. This can be partially attributed to the abundance of regional, national and
local educational mechanisms and structures, whether provided by
government agencies or non-governmental organizations, business
groups, academic and professional organizations or religious soci-
eties. Since the late 1980s, there has been increased civil-society
involvement in adult learning, especially at the local level.

In most African countries, young people represent up to 45 percent
of the national population, but the learning needs of the majority of
them are scarcely being met. The majority of those affected are girls
and women, although the gender gap has been reduced in most
Eastern and Southern African countries. African governments are
often so preoccupied with the immediate weight of debt and present
political problems that they fail to realize potential solutions to both
lying already at hand in the drastic reduction of the numbers of the
unschooled and unskilled. On the other hand, the formation of the
Association for the Development of Education in Africa (ADEA) has
stimulated a multitude of activities in the areas of formal and non-
formal education and female participation in education as well as in
the original composition of books and learning materials. The need to
create literate environments in multilingual and multicultural settings
has been addressed by a series of initiatives on language policies and
the use of the mother tongue in literacy training, and further in the
creation of the African Academy of Languages. Finally, the launching
of the New Partnership for Africa’s Development (NEPAD) as the key
development framework for the region augurs well for the fundamen-
tal role of education in the region’s future.

In the Arab States, security, poverty, deteriorating economic condi-
tions, economic sanctions, the destruction of educational infrastruc-
tures and difficulties in post-conflict recovery in countries such as
Iraq, Lebanon and Palestine are reversing progress made in literacy
and adult education. Of a total population of 280 million, about 10
million citizens of these states are illiterate adults, while 10 million
school-age children are not enrolled in schools. Despite these difficul-
ties, there has been enlarged interest in all aspects of adult education,
reinforcement of the relation between formal and non-formal educa-
tion and strengthening of the commitment to the universal ‘right to education’. A major new development consists in the establishment of the Arab Network for Literacy and Adult Education, directed towards promoting new associations at the grassroots level and interconnecting education activities at all levels.

In Latin America and the Caribbean, literacy has recently been re-invigorated in many countries. New national coalitions and institutions have been formed specifically to administer youth and adult education. Co-operation in vocational education has begun in some countries. Progress made in constructing adult education theories in the region has led to a redefinition of the basic learning needs of youth and adults, including conflict resolution, education for peace, citizenship and cultural identity; also involved are the appreciation of cultural patrimony as well as health issues, human rights and interculturalism – not only for indigenous peoples, but for the entire population. Nonetheless, there are still 39 million illiterates, 11 percent of the population 15 years and older. To this figure must be added 110 million young persons and adults who, not having completed their primary education, could qualify as functional illiterates. In this region, 20 percent of children do not finish primary education. Although relatively advanced, since almost universal access is available, the educational system in Latin America faces a significant problem of quality.

In many parts of Europe and North America, where basic education does not pose a problem for large numbers of the population, there is a pronounced need to examine and address the unmet needs of special groups (e.g., Roma/Gypsies, migrants, asylum seekers). While there have been accomplishments in policy development for capacity-building of structures, support mechanisms, partnerships and financing for increasing the quantity and quality of adult learning within a lifelong, life-wide and life-connected framework, there is a distinct unevenness in achievements. There has been greater coherence at the conceptual level, following the shift in emphasis from adult education to adult learning within the overall scheme of lifelong learning – this under the influence of supranational agencies such as UNESCO,
the OECD and especially the EU. At the practical level, however, there remains abundant diversity in interpretation.

Finally, trends in education funding around the world indicate that as a percentage of gross national product, public investment in education has stagnated or declined across all developing regions. Market control over education, its vocationalization and continued disparity in access to quality education are the hallmarks of the current situation. The growing privatization of public goods and services has brought with it a previously unknown marketization of education, especially higher education. A dichotomy persists in the provision of education: high quality education is, indeed, available, but at a price which the vast majority of people (especially the rural poor, minority communities, indigenous peoples and other socially and economically disenfranchised groups) cannot afford, so that they have to rely upon options of poor quality and doubtful relevance.

All of these conditions shaping the complex and difficult contemporary world of adult education and learning underscore why action and accountability are now obligatory.

**Adult Education and Learning since 1997**

**Understanding Adult Learning**

Despite the conceptual shift from adult education to adult learning disseminated at CONFINTEA V, the latter is unevenly understood and cultivated among different regions and stakeholders. In many countries, adult learning is considered equivalent to acquiring literacy skills. In others, it is confined to vocational education. Learning as the key principle underlying development processes, whether in the areas of active citizenship, health or environment, still needs to be recognized and incorporated in theory and practice.

Yet despite this shift to adult learning, adult education, inasmuch as it pertains to policies, structures and resources, remains an important
point of theoretical and practical reference. There is growing interest in relating adult education and/or education in general to the concept of lifelong learning as a policy issue and an operational frame of reference. At the same time, because of the unevenness in the understanding of adult learning, ambiguity persists about its relation to lifelong learning. Although adult learning is part and parcel of lifelong learning, in some instances lifelong learning is wrongly reduced to adult learning.

While UNESCO has played a key role in promoting an understanding of the process of learning as the essential element of development, major international agreements adopted at the start of the twenty-first century like the DAKAR Framework for Action and the United Nations Millennium Development Goals nevertheless remain weak in their advocacy of adult learning.

**Making Policies for Adult Learning**

The lack of a shared understanding of adult learning coupled with diverse social, political and economic contexts has led to a policy-discourse divide running particularly along the line between industrialized and developing countries. The former are largely preoccupied with the operationalization of lifelong learning in perfecting the so-called ‘knowledge society’. Among the highest priorities are the use of information and communication technologies and the training of the labour force. Developing countries, meanwhile, tend to focus on basic education for all, especially literacy. Very few of these countries ground their educational priorities in the lifelong-learning paradigm. The broad scope of adult learning is, then, reflected in the policies of only a very few countries.

Although adult learning occupies a wide range of sectors from agriculture and labour to health and the environment, there continues to be little recognition of the way learning substantially contributes to attaining their objectives. Once again, the principal role of adult learning in development remains to be acknowledged in national policies and international agendas.
Structuring Adult Learning

The organization of adult learning in many countries is a task for the government as well as non-governmental organizations and private agencies. While the government is primarily responsible for providing adult education, many non-governmental organizations and employers support continuing learning.

A number of countries situate their offices of adult education in the Ministry of Education, while others do not entrust any agency at all with such responsibility. Among the former, relating adult learning to other sectors and integrating its concerns with theirs remain challenges. Among the latter, the diffusion of responsibility for adult learning needs to be counteracted by conscious efforts to bring together all sectors involved in adult education.

In some countries, there is a perceptible movement away from mere basic literacy towards a more integrated view, one connecting adult, non-formal, informal and lifelong learning opportunities with the Education for All goals. Many are becoming more conscious of gaps in literacy and are beginning to focus more closely on unreached segments of their population.

Meanwhile, a large part of adult education work takes place outside the purview of those government agencies directly responsible for education. Community health programs, early childhood care training, environmental education courses and skill-training, for instance, are often run by a variety of government agencies (e.g., ministries for women and children, ministries of agriculture, ministries of health). Yet there are no procedures for tracking these programs in unified fashion, nor are there any means for their being readily informed by other adult education practices.

Decentralization is another trend reflecting the desire of various national authorities to contextualize adult education, and that for two reasons: to increase the relevance of learning in view of local needs and to lessen central administrative burdens. Common among devel-
oping countries, however, is that policies of decentralization are hampered by enduring centralized decision-making. In addition, regional, provincial or local structures suffer due to inadequate resources (financial and human) provided by central authorities. An encouraging phenomenon appears, on the other hand, in the participation of non-governmental and civil society organizations in activities at various levels in a number of countries in which distinct mechanisms for partnerships between the government and such agencies are already in place.

A crucial issue concerns the growing demand on the part of adult learners for the formal recognition of their prior learning, particularly where economic opportunities are at stake. The drive for the accreditation of prior learning in both industrialized and developing countries aims at overcoming the dichotomy between competencies acquired through the formal system and those acquired outside it. National qualification frameworks developed in a few countries aim to address this demand.

**Adult Learning – For What?**

Governments and non-governmental organizations have different priorities for adult learning. Five areas which have been identified are: a) democracy and active citizenship, b) literacy and adult basic education, c) decent work environment, d) media and information and communication technologies, and finally, e) the needs of special groups. Among learning groups, women have taken center stage, the emphasis being on their learning for gaining control of their lives. Side by side with this focus is a burgeoning interest in promoting gender perspectives.

Reasons for advancing adult learning in the first area range from responding to growing anti-democratic movements throughout the world and dealing with mounting hostility against foreigners to issues of consumer rights and environmental matters. Other reasons include building the capacity of the judicial sector to deliver legal services, strengthening civil society, aiding decentralization
in transitional countries and promoting active participation in new democratic regimes. Democracy and active citizenship require new skills and competencies along with capacities for institution-building. Participatory programs empowering rural communities have been invaluable in cementing human rights, raising gender awareness and enhancing the income-generating skills needed to fight poverty. The same holds for conflict resolution and efforts aimed at constructing a culture of peace. In several post-war countries, where the social fabric has been rent by war, participatory approaches to adult learning are being used successfully to encourage peace as well as raise the consciousness of learners through civic education in their rights and responsibilities.

Basic literacy for all remains a high priority as a foundation of learning. In a few countries with over 85 percent illiteracy, governments are making significant attempts to come to terms with the problem. In some developing countries, adult basic education is viewed as a major component of the effort to enable every citizen to gain access to lifelong learning. Often literacy projects are integrated into strategies for poverty reduction aiming at improving living conditions. Significant innovations have to do with interlinking literacy with care for the environment, health matters, human rights, income-generation, empowering women and enhancing the overall quality of education.

The use of information and communication technologies has expanded in the context of educational, documentation and information services employed by grassroots movements and village associations, even as market forces are exploiting them to transform education into a commodity. These same technologies have been put to work as tools for self-expression providing new opportunities for creative expression. They have also facilitated the free exchange of information, ideas and products through innovations such as open-source software, peer-to-peer sharing and even e-mail, contributing to an affirmative culture of knowledge-sharing and interactive learning.
The learning needs of special groups have been addressed in several ways. In Europe, adult learning initiatives for these groups have been primarily directed at the unemployed. Support has been given to immigrants, ethnic minorities and other marginal groups, refugees forming an important reference group in adult education in industrialized countries. Several countries report special programs for indigenous populations. Adult learning for prisoners and handicapped persons has been given scrupulous attention, however in only a few countries.

While many governments and non-governmental organizations report activities in these five areas, there has been no systematic effort to determine their efficacy or the extent to which they have met their stated objectives. What learners have actually achieved in these areas still needs to be established.

**Participating in Adult Learning**

Due to the inherent breadth of adult learning, ascertaining the number of women and men who actively participate in it is difficult. Very few countries can provide reliable statistical data on participants in adult education programs since 1997. The dearth of such data means that observations about adult education frequently involve estimates based mainly on the supply of educational services.

Such estimates reveal that participation rates vary among diverse population groups and even in different parts of the same country. In the Nordic and Caribbean countries, it seems that more women take advantage of learning opportunities. In other areas, men outnumber women. A positive trend, reported by many governments, lies in the unprecedented expansion of learning opportunities for girls and women and the increasing numbers of those who have taken advantage of such opportunities.

Rates in the level of participation in adult education have been reported by nearly all countries in terms of quantity, with almost no reference to quality. Yet there were, in the vast majority of the reports,
no statistical data provided to justify claims made for quantitative increase. This represents a serious methodological gap, one making it difficult for the observer to assess the value of what has been offered to participants or the extent to which participants have benefited from programs.

Three developments which have contributed to an increase in participation in adult learning are the educational activities of social movements and non-governmental organizations, the International Adult Learners Week and the establishment of community learning centers.

**Enhancing the Quality of Adult Learning**

Documentation and research are vital for ensuring the quality of adult learning. But the evidence reveals a chronic lack of systematic documentation (both quantitative and qualitative) of adult learning experiences and very little indication of how research findings influence policy and practice. While many countries have research institutes for adult education (whether situated in the government itself, universities or the private sector), it is clear that such research remains under-funded in comparison to other education branches. Furthermore, there is limited use of research findings for improving adult education. Consequently, it is no surprise that only a few countries mention the impact of research findings on policies and practices of adult education.

The lack of systematic monitoring and evaluation of adult learning reflects a clear need for a more coherent approach. Most countries make no reference at all to the evaluation of adult education apart from cases where donors have demanded it. The development of indicators and identification of benchmarks remain desiderata. Yet there is a burgeoning desire to monitor and evaluate education programs in order to learn lessons which can be applied to future plans and policies. UNESCO, through its Education for All Observatory, is currently working on the creation of indicators for monitoring progress towards the six Education for All goals. There already exists a set of
18 indicators allowing for reports on the achievement of universal primary education, elimination of gender disparities, progress towards 50 percent improvement in adult literacy as well as quality in primary education. Together with UNESCO, other supra-national agencies such as the OECD, the EU and the World Bank are propelling the creation of benchmarks and indicators within an overall framework of monitoring and evaluation for enhancing efficiency and effectiveness in education.

Achieving high quality in adult learning programs depends in large measure on the availability of knowledgeable, skillful, sensitive and socially committed adult educators. Yet priority has not been given to their training. In addition, there is the issue of the character of many programs offered, conceived, as they all too often are, narrowly, in instrumental terms and for a limited clientele. There is a lack of comprehensive information on adult educators themselves in most countries: on their types, identity and profiles, numbers, working and living conditions, training needs and kinds of training available to them, and other basic data.

The global potential of information and communication technologies for improving the quality of adult learning continues to be hindered by the lack of requisite infrastructures. The hope expressed by many countries is that such technologies will play an important role in adult education by expanding access, reducing costs, improving quality and putting learners in control of their own learning. The trend is uneven, however, between industrialized and developing countries. The former have to a large extent succeeded in integrating such technologies into their education systems, including adult education. In the case of the latter, some countries are more advanced than others in applying information and communication technologies. Yet inasmuch as no relevant policy decision appears to have been made by any developing country concerning these technologies, no substantial resources seem to have been allocated for their application in adult education. The obvious reasons cited by many countries have to do
with the lack of financial resources and the shortage of trained personnel.

Many countries are creating opportunities for continuing education and enriching the literate environment of adults through the use of mass media, libraries and community learning centers.

**Cultivating Partnerships in Adult Learning**

A critical element in promoting adult learning is partnership between governments, non-governmental and civil society organizations, and the private sector. While governments have a major role to play in providing adult education, there are signs of increasing responsibility taken by social partners. This illustrates a shift in the role of governments, which for practical reasons may not be able to respond to all demands for learning, especially in countries where knowledge is expanding at a rapid rate and the labor market is dictating the pace of change in workers’ qualifications. There is also a difference between partnerships in the developing countries, in which social partners – particularly non-governmental organizations – are rarely involved in policy-making, and those in most industrialized countries, in which social partners have more political influence.

Reports submitted by countries on international co-operation confirm the continued existence of the familiar one-way pattern of co-operation in the form of financial contributions or technical assistance given by countries, international or regional organizations, or non-governmental organizations of the North to countries of the South. Quite a number of these contributions and forms of assistance, especially those given by bilateral donors, are short-term ventures which have had little lasting effect on adult education. Just as very few countries report long-term co-operative programs, South-South co-operation is also rarely mentioned.
Investing in Adult Learning

Adult education has historically suffered almost everywhere from inadequate financing. The situation today is not much different, with the exception of a very few countries. This is compounded by the fact that only a small number are able to report accurately on investments made in adult learning. Both the sources and patterns of financing of adult education are so diverse that it is almost impossible to paint an accurate picture of them.

Another difficulty is that adult learners in some countries participate in diverse activities supported by different institutions which fail to keep separate records for adult learners. It is important to bear in mind that the financial aspect of adult education involves a variety of items shared by other educational services. Some of these expenditures include, in addition to teacher salaries, books and study materials, equipment, furniture, buildings, maintenance etc. A substantial part of costs in all countries is absorbed by volunteers contributing their time and effort.

Two patterns of financing emerge from the analysis of all reports. The first, cutting across all countries, relates to the involvement of state authorities (whether central or local) in collaboration with the private sector. The second concerns national and international co-operation. At the national level, non-governmental and civil society organizations play an important role in mobilizing funding for adult education and in sponsoring adult education programs.

Challenges to Adult Education and Learning

CONFINTEA V codified a paradigm shift from adult education to adult learning. This shift has, on the one hand, positive implications in terms of encouraging a wider, more holistic appreciation of education – one transcending the merely formal sector, unfolding as a lifelong process, responsive to the different needs and varying contexts of learners themselves. On the other hand, it threatens to transfer, especially in a globalized, market-oriented context, the onus of educational respon-
sibility to learners, who increasingly must pay for services of poor quality, along with civil society organizations and the market itself. It thus allows states to abdicate their responsibility for providing citizens with good and relevant educational opportunities. Especially in situations of widespread poverty, however, the withdrawal of state support seems premature. Furthermore, the emphasis on adult learning itself is in danger of losing sight of the needs of the almost one billion adults with little or no literacy skills and competencies.

The EFA Global Monitoring Report 2002 has already made it clear that the adult literacy goal will not be reached in as many as 79 countries. Currently, an estimated 862 million adults are deemed to be illiterate. This number exceeds the total number of children in primary schools throughout the entire world. In this regard, the renewed vision of literacy outlined in the United Nations Literacy Decade (UNLD) and its International Plan of Action is clearly of central importance. Both adults and young people have to acquire new forms of literacy and be given opportunities to develop their ability to select, evaluate and utilize information in relevant fashion. Yet the United Nations Literacy Decade bears both risks and opportunities. Serious hazards lie in the damaging repercussions for our world should we fail to make a real difference for those people who still live without the tangible benefits of literacy or whose lives remain burdened by low levels of literacy. Meanwhile, encouraging prospects in meeting adult literacy objectives reside in the provision of fresh resources and capacities, reflected in individual existences endowed with hitherto unavailable possibilities for economic, political and social growth.

The United Nations Millennium Development Goals have become effective measures for adult learning and related development issues. They could usher in the real manifestation of the collective will of nations and other social and economic forces for actively addressing extreme poverty. These goals can be achieved, however, only through strategically incorporating adult learning. Moreover, since CONFINTEA V, the significance of adult education for addressing the HIV/AIDS pandemic has been recognized. It is clear that AIDS is not
a health issue alone, but is instead implicated in matters of poverty, development and gender.

The increasing commoditization of knowledge and limitation of ownership are disturbing, as is the mounting loss of independence in research. Inasmuch as facilitating people’s critical analysis of their situation can promote their working to enrich their own livelihood, empowerment through education and learning represents a key to sustainable and equitable development. It is essential to assert the need for universal access to knowledge along with the autonomy of research. The importance of respecting and preserving indigenous forms of knowledge is likewise a pressing concern.

As its contribution to the CONFINTEA V Midterm Review, the International Council for Adult Education (ICAE) conducted studies in 16 countries, employing a set of 11 indicators reflecting a civil society perspective. The study concludes that although a new vision of adult learning is, indeed, emerging, the respective discourse and action are incongruent. Significant progress has been made in work-related learning, as innovations are observable in all regions, but literacy and Education For All tend to remain separate. Too little attention has been awarded to the significance of adult learning for citizenship, health and environmental concerns. Explorations of experiences gained in empowering the most vulnerable members of society continue to be exceptions. There are almost everywhere genuine indications of a benevolent political will, but what is needed now is concrete action and accountability.

**A Call for Action and Accountability**

We, the participants in the Midterm Review of the Fifth International Conference on Adult Education (CONFINTEA V), have come to the conclusion that despite the commitments made in 1997 in The Hamburg Declaration and The Agenda for the Future, adult education and learning has not received the attention which it deserves in major education reforms and in recent international drives to eliminate poverty,
achieve gender justice, provide education for all and foster sustainable development. Our Midterm Review of the worldwide situation of adult education and learning – conducted thematically, globally, regionally, nationally and locally by governments, non-governmental and civil society organizations, engaged networks, social movements and other partners – has, in fact, revealed a disturbing regression in the field.

For we have seen a decline in public funding for adult education and learning, even as the minimal adult literacy goal set in the Dakar Framework for Action is achievable – requiring just US $ 2.8 billion per year. Furthermore, support by various international agencies and national governments alike has concentrated on formal basic education for children to the detriment and neglect of adult education and learning.

The ability of adult education and learning to contribute to a world in which people live together in peace and democracy and its potential to contribute to building learning societies in support of the struggle against poverty and overcoming global strife, violence, HIV/AIDS, environmental destruction, demographic tensions and a myriad of other ills have not been adequately realized. We are particularly concerned that its potential to enable people to live in a world with HIV/AIDS is not being exploited, as millions of vulnerable young persons and adults are exposed to the consequences of the pandemic.

We are alarmed that the confident perspective documented by CONFINTÉA V has given way to a situation which, due to global tensions, conflict and war as well as the weakening of the United Nations, is dominated by fear and insecurity.

Nonetheless, there is yet a chance for creative action. Despite the daunting realities now confronting us, we are witnessing the birth of a new global consciousness which itself, insisting on equality and diversity and calling for universal respect for ethics, rights and laws,
spawns the hope that another world and another kind of education and learning are still possible.

For our Review has also highlighted numerous innovative policy and legislative changes, an increased tide of participation in adult education and learning, significant advances in the empowerment of women and the expression of new learning demands by groups with special needs attended by pioneering inclusive educational responses serving these groups. The joy of learning is celebrated in Learning Festivals and Adult Learners Weeks in more than 50 countries worldwide. In view of these developments, we, the participants in the CONFINTEA V Midterm Review, reaffirm our commitment to The Hamburg Declaration and The Agenda for the Future. We wish to remind the world that adult education and learning is a fundamental human right and therefore must remain a collective responsibility shared by all learners, adult educators, governments, non-governmental and civil society organizations, the private sector, international bodies and the entire family of the United Nations. All of these actors and partners must work with UNESCO and UN agencies to propel, monitor collectively and account for the endorsement and implementation of lifelong learning made at CONFINTEA V.

We believe that the political will to achieve the goals of The Hamburg Declaration and The Agenda for the Future must now be backed with resource allocation, outfitted with a concrete course of action and new equipped with new partnerships.

Today, more than ever, adult education and learning comprises an indispensable key to unlocking the creative forces of people, social movements and nations. Peace, justice, self-reliance, economic development, social cohesion and solidarity remain indispensable goals and obligations to be further pursued and reinforced in and through adult education and learning.
We therefore call upon Member States, bi- and multilateral agencies, non-governmental and civil society organizations, social movements and the private sector

- to include adult education and learning in all development initiatives and social programs as an essential contribution to economic prosperity, sustainable development, social cohesion and solidarity;
- to promote community-driven development approaches as an important starting point for adult education and learning as well as poverty reduction;
- to adopt inclusive policies and take concrete measures and provide adequate resources in support of education programs mainstreaming and catering to the learning demands of persons with disabilities as well as marginalized groups such as indigenous people, migrants and refugees, minorities (including sexual minorities, where licit), prisoners etc.;
- to recognize adult learning as an investment and not solely an item of social consumption, let alone merely a marketable product;
- to increase funding for adult learning, as a consequence, to an equitable share of the six percent of the Member States’ gross national product to be invested in education set as a benchmark by The Agenda for the Future;
- to accept that commitment to lifelong learning for economic prosperity and social cohesion is a necessary response to globalization as well as an essential component of local community development and individual self-fulfilment;
- to integrate adult education and learning more systematically into the education plans and agendas of governments at the local, national, regional and global levels as well as into the programs, conferences and summits of UN agencies – especially those related to the United Nations Literacy Decade (2003-2012), the Dakar Framework for Action (EFA), the United Nations Millennium Development Goals (MDG), the World Summit for Sustainable Development (WSSD) and the Fast Track Initiative (FTI) of the World Bank – and so take advantage of its synergetic potential;
• to articulate organically CONFTEA V recommendations for adult literacy and adult basic education with the United Nations Literacy Decade International Plan of Action and the Dakar Framework for Action and implement them in the perspective of lifelong learning.

We call in particular upon the industrialized nations to align their aid agencies and education ministries with the bi- and multilateral agencies they support in order to harmonize domestic and international policies for lifelong learning.

We call upon UNESCO

• to integrate the CONFTEA V follow-up with the monitoring of EFA goals and invite accordingly all partners to provide and produce collective input for the EFA Global Monitoring Report and its underlying processes, especially the 2005 Report to be devoted to literacy;

• to support the national capacity of Member States as well as non-governmental and civil society organizations and partner agencies in training adult educators, in establishing indicators for continuous monitoring of the United Nations Literacy Decade by 2004 and in systematically assessing literacy levels in different countries and contexts;

• to reinforce the UNESCO Institute for Education (UIE) in monitoring the implementation of CONFTEA V commitments with all partners along the lines expressed in this Call for Action and Accountability.

Finally, we call upon Member States, UN agencies and non-governmental and civil society organizations as well as social and private partners to organize the Sixth International Conference on Adult Education (CONFTEA VI) in 2009 as a case of accountability in adult education and learning, one based on collective monitoring and evaluation.
Invitation to the Workshop on Theme 10

Enhancing International Cooperation and Solidarity

During CONFINTEA V in Hamburg 1997 the theme “Enhancing International Cooperation and Solidarity” was discussed during a workshop session. Major results were included in the Agenda for the Future:

“International cooperation and solidarity must strengthen a new vision of adult learning which is both holistic, to embrace all aspects of life, and cross-sectoral, to include all areas of cultural, social and economic activity. The Universal Declaration of Human Rights must be the principal source of guidance in the promotion of international cooperation and solidarity, and the culture of peace. Dialogue, sharing, consultation and the willingness to learn from one another are the basis of this cooperation. It should include respect for diversity.”

A look at the UIE information shows that the aims of the Midterm Review are
a) to discuss the gains (accomplishments) since 1977 as well as problem areas in meeting the Hamburg Declaration and the Agenda for the Future;
b) to look at the latest developments and trends in their respective themes; and

c) to come up with concrete recommendations for the CONFINTEA V Review.

During the workshop we expect presentations on the following issues:

- Chris Duke reports on the Beijing Conference on international cooperation in adult education organized by ASPBAE
- Ellinor Haase looks at cooperation within the European region and its respective association EAEA
Jun Sakuma and Maki Hayashikawa present strategies, projects and new ideas in the context of Japanese overseas aid JICA

Rosa María Torres discusses her view on international developments from a Latin American perspective, including her new report ABLE

Heribert Hinzen presents the terms of reference of a IIZ/DVV study on international cooperation, partnership and solidarity.

It could well be that additional presentations from colleagues working in international agencies are added. However, we shall most of the time discuss the current reality, and future perspectives. In the afternoon of the 7th we shall have to prepare a written report for the Report Committee on the 8th. Additionally, highlights of the workshop may be presented during the plenary on the 9th, reserved for thematic reviews. We welcome participants to join our sessions.
Report and Recommendations from the Workshop on Theme 10: Enhancing International Cooperation and Solidarity

The more than 30 members of the Theme 10 review were not buoyant about progress since CONFINTEA V. The situation is bleak, mainly because of the impact of the negative aspects of globalism in its economic and political manifestations (widening poverty gaps, 9/11, the war on terrorism). As a result adult and nonformal education (ANFE) is not obviously flourishing. It is often still marginalised and displaced by competing priorities in a context of competitive sectoral thinking. Failure of a collaborative and whole-of-government approach is a multi-layered problem. Five negatives are summarised as schizophrenia within the World Bank and other institutions over ANFE/lifelong learning; ‘elitisation’ of ANFE; bureaucratization; failures of implementation; and failure of interagency cooperation. There is no room for ‘more of the same’. A breakthrough is essential.

The invisibility of ANFE implies a call for EfAA (Education for All Adults). The tension between embedding ANFE into all international collaboration programmes and its invisibility and under-resourcing is unresolved. Planning for sustainability is short-cycle (e.g. 3 years) whereas many trends and learning cycles span 20 years or more (for example World Bank swings for and away from ANFE; addressing the AE and poverty connection).

There is also continuing essential solidarity, optimism and collaborative struggle across agencies and levels; and unresolved dialogue to be had between NGOs and social movements. Dichotomies between children and adults, formal and nonformal, government and NGOs/CSOs, must be transcended in building integrative partnerships. Strong States are needed to ‘hold the ring’ for the celebration and support of diversity. An abiding test of success and well-being remains the situation of the poorest and most marginalised in all societies.
Bright spots include the fresh and open approach of JICA, the breadth of approach of the EU, and the willingness of the World Bank to reconsider its stance on ANFE. In making priority recommendations for the coming period, the great diversity of purposes of international cooperation must be recognised (e.g. European enlargement or North-South partnerships). Confusion and corruption of language require unswerving vigilance.

The Hamburg Agenda and commitments for Cooperation remain important and unfulfilled. New urgencies include its emphasis on the Universal Declaration of Human Rights as the key guide to promote international cooperation, solidarity, and the culture of peace, also respect for diversity. It committed to treating adult learning as a tool for development, and assessing all projects in terms of their contribution to adult learning and priority given to local expertise. The meeting recommended strengthening this to require that a mandatory lifelong learning dimension be built into every development initiative.

The Agenda called for strengthening national, regional and global cooperation, organisations and networks of adult learning, especially inter-agency and inter-sectoral cooperation and network development, and creating a good environment for international cooperation. The meeting calling for a whole-of-government approach and for effective collaboration between agencies to ensure that adult learning is embedded in all programmes. It stressed multi-layering in collecting, sharing, disseminating and learning form our experience, success and failures, and dialogue and policy coherence between professionals in departments responsible for education and development cooperation within each agency/government. More bottom-up participation is required.

The meeting also resolved on the following additional priorities for action.

- To adopt specific forms of inter-regional as well as intra-regional knowledge sharing, and to put an end to the separation between lifelong learning for a knowledge society in the North and literacy
and ANFE for the South, treating these as an integrated spectrum for all societies and equally valuing and sharing local experience, knowledge and wisdom wherever these are generated.

- To argue for higher priority to be given to ANFE, while ensuring reciprocity and reinforcement between the learning of children and adults.
- To work to longer time frames for projects and for capacity building and sustainability.
- To find more effective means of converting policy initiatives for cooperation into sustained action, reflecting the energy of social movements from beneath and the exercise of political will from above.

To support a sequence of activities building capability for international cooperation and learning as follows:

- A study of experiences in enhancing cooperation, partnership and solidarity in adult education, learning and training on the lines of the tabled draft Terms of Reference (TOR)
- An observatory for a continuing process of monitoring and learning, including its use for
- An online debate to support an active exchange on these issues, which is more open and democratic than an international conference limited to a few senior members, leading to
- A policy dialogue between all the major donors and players including multi-laterals and NGOs to critique the outcomes of this work in face-to-face conference in 2004 or 2005, and also contributing to
- A better and more useful questionnaire to go to Member States for Confintea VI in 2009 than was prepared and used in the preparation for Confintea V.

In view of the urgency to strengthen cooperation and give new priority to ANFE and education for all adults, Confintea V + 6 is urged to forward an Executive Summary from this meeting to Member States in time to inform the October General Conference Mid-Term Review and Plan for 2004-2009, in preparation for Confintea VI in 2009.
A “Mediterranean Conference on Lifelong Learning” was held in Malta by the IIZ/DVV from 13 to 15 September 2003. This followed an earlier initiative in Cyprus in May 2002, which was restricted to the Eastern Mediterranean. The circle of attendance was larger this time, with representatives also from North Africa and the Middle East. It became clear how little people knew about each other and how important it was to find out more in order to expand mutual understanding. There was a need to develop adult education from a Mediterranean perspective that reflected Mediterranean circumstances. There was discussion of whether to set up a Mediterranean Adult Education Association. In response to a suggestion by Moroccan colleagues, it is planned to hold a further meeting. At the end of the Malta conference, a “Final Declaration” was drawn up in which the states taking part set out their views, plans and aims. The opening address of the conference was given by Dr Michael Samlowski, Deputy Director of the IIZ/DVV. Both texts are reproduced here.

Michael Samlowski

Introductory Welcome

I am very happy that we have been able to come together for this Mediterranean Conference on Lifelong Learning and Adult Education. Thank you for following our invitation, especially considering that some of you received it so late or during your summer holidays, and that quite a few of you had only a very vague notion about who was convening the conference, for what purpose, and who else would be here.

Some of us, however, have known each other for quite some time as good friends and colleagues, although not necessarily in our present
capacity as Mediterranean adult educators. Some of us only just met less than a year ago on the Mediterranean island of Cyprus where we had our first opportunity together to explore the education situation in one another’s countries. On that occasion our focus was the Eastern Mediterranean region. There were many drawbacks to hamper the progress of our first mutual endeavour. We were a rather small group with practically no representation from Arab countries. Broader participation was hindered by political strife. Only two colleagues from smaller private Egyptian AE organizations were present, but none from any of Egypt’s mainstream AE institutions. Some Arab contacts elected not to come to a conference whose participants might include colleagues from Israel. Turkey was not represented because of difficulty with the venue, Greek Cyprus. Participation in the first conference was not restricted to “Mediterranean” countries in the strict geographical sense of the word. Bulgaria, which does not border the Mediterranean Sea but nevertheless shares a good measure of Mediterranean culture and history, was present.

We were searching for evidence of things in common: common history, common experience, common problems and challenges that make the Mediterranean region stand out as different from Central and Northern Europe, and we found it in abundance. We may want to investigate some aspects of this theme at a later point during the present conference. Much of what we found is contained in a little brochure “Perspectives on Adult Education in the Mediterranean and Beyond” that we put together to document our findings and our thinking. Copies of the brochure are available for everyone here as long as stock lasts.

But we also found that there is very little information available in the various countries about the situation in the field of adult education in the other countries, and that there is even less cooperation among our respective educational systems on a national scale, but also on the level of individual institutions or persons. It is true: there is involvement on the part of organisations from European Mediterranean countries in European projects sponsored by the European Commission and its
Socrates or Leonardo Programmes with their Grundtvig, Comenius or Erasmus actions. But this involvement is not up to par with the participation of Central and Northern European countries, and it does little to strengthen a Mediterranean approach to Mediterranean issues.

This has many reasons, only some of which I want to mention at this point. Others may be explored by us in the course of these few days that we will be together here in Malta.

It is not possible to engage in cross-border cooperation without adequate funds. But most of the countries in the Mediterranean area only have very limited funding for their adult education and lifelong learning programmes and provision. Any activities that go beyond the basic requirements are considered a luxury and consequently do not take place, as a rule, unless some outside funding can be secured. At best, they occur haphazardly and cannot provide any solid basis for sustainable cross-border cooperation practice.

One of the possible sources for funding international cooperation that includes Mediterranean countries is the European Union. But there are limitations involved: EU programmes and actions are highly prescriptive by nature. Normally they do not leave room for participants to develop their own priorities and activities but require them instead to follow topics or methods defined by the EU. These programmes and actions normally require the involvement of partners from various regions of Europe rather than from one region alone. Language is a barrier since most activities within the framework of international cooperation rely on English as the common language, and in the Mediterranean area English is not as widely used as a foreign language as in other parts of Europe. In addition, it is unfortunately the case that funding opportunities within the framework of most European programmes are mainly available to the countries within the European Union, and only to a much more limited degree to those outside the EU. It is true that for some time accession countries have been eligible for funding from a wide range of European programmes, but only to the extent that their governments have invested in these programmes.
And it is also true that most of the European countries not yet eligible for accession are located in the Mediterranean area: Croatia, Serbia, Montenegro, Bosnia-Herzegovina, Macedonia, Albania, and Turkey. What is more, these programmes do not come into consideration at all for the African Mediterranean countries or those from the Middle East. Later on we will hear more details about European programmes that may be available to those countries, and whether or not they provide an adequate response to cooperation needs in the field of adult learning and further education.

So when analyzing the issue of a Mediterranean identity and common Mediterranean problems and interests, we felt very strongly that we needed a wider perspective – one that goes far beyond a European approach. Historically, a Mediterranean identity is unthinkable without the countries of Northern Africa and those of the Near East. But there are precious few ties and connections here, and a great need to get to know one another, to obtain better understanding not only of our countries’ characteristics, assets, and strengths, but also of their weaknesses, deficits, and problems. In addition, much of the little we do know about one another has come to us through a filter of ideological and propagandistic bias that shrouds the real people and their real issues, needs, worries, and concerns. This is a notorious obstacle of our times. Islam is seen by some as the only salvation to every issue, and by others as a looming threat. In most countries we have not been able to form an impartial view of Islam as a religion adhered to by millions of people through tradition as well as conviction, just as the various Christian beliefs are by millions in other countries, Judaism elsewhere, Buddhism yet in others, and other faiths as well. Outside Islamic countries few people have taken the time or trouble to learn about what Islam stands for, and this is part of the reason why so many people are so easily influenced to believe that Muslims are a threat to peace, stability, and democracy. There’s no denying that prejudices against Islam are part of the reason why so many people in Western Europe are so sceptical about whether or not Turkey should have a chance to join the European Union!
One of the characteristics of the Mediterranean region is that it is beset by a higher measure of conflicts than most other regions, conflicts that frequently erupt in violence. I am sure we are all painfully aware that we cannot evade the issue of the unresolved Israel-Palestine conflict that continues to escalate in a never-ending spiral of assault and suicide bombings, rockets, tanks, destruction, premeditated killings, daily degradation of people, fear and terror, making a normal life impossible for both Palestinians and Israelis, and implicating not only the neighbouring countries of Lebanon and Syria but others as well.

And while this may be the most painful focus of conflict and violence at the moment, neither can we close our eyes to the situation in Iraq where a dictatorship has been toppled with a questionable international mandate at the cost of thousands of lives, both military and civilian, the destruction of civil structures, and the damage to the dignity of an entire people. Although Iraq does not border the Mediterranean, what is happening there concerns everyone in the region, and indeed everyone in the entire world.

We cannot overlook the civil war that wrought havoc throughout the Balkans. A semblance of normalcy has been returned to the region, but the conflicts remain unsettled as witnessed by recent flare-ups of fighting in Northern Macedonia and the continued need for peacekeeping troops from abroad. Enough war crimes have been committed to poison relations for generations. Millions of people were forced to resettle, and although the famous bridge of Mostar has been restored, the relations between people on opposite sides of the river Neretva have not.

Fortunately no bloodshed has occurred on the Island of Cyprus for quite some time. And yet the conflict there has led to the forced relocation of hundreds of thousands Greek and Turkish Cypriots who once, before the invasion, shared life in their villages and towns. It is difficult to imagine how ill feelings may someday be reconciled on the part of all those who have had to give up their homes, their land, and their very existence.
We cannot forget the killings of tourists in Egypt and Tunisia, nor the abductions that took place in Algeria – acts of terrorist violence, although one may argue that Germans or Austrians have no business crossing the Sahara on motorbikes as if the mightiest desert on earth were their personal playground and training field. Worse still are the many deaths in Algeria at the hands of fundamentalist groups intending to transform that country into an Islamic state.

Libya, in the eyes of Europe, is associated with acts of terrorism such as the destruction of the civilian jetliner over Lockerbie that cost 270 innocent lives, a deed for which the Libyan government now seems to assume responsibility through its offer of compensation to the families of the victims.

And let us not forget that only two short generations ago there was a civil war raging in Spain, and that the dictatorships in Portugal and Spain were not terminated until 1970 and 1975. Let us bear in mind that ETA is still fighting for an independent Basque country.

I fear we are still a long way from being able to witness the development of normal neighbourly relations among our countries in the region. So living with conflict, analysing its causes, understanding its implications and detrimental influence is probably one of the most important issues in the entire Mediterranean region. I am certain that it can prove to be enormously beneficial to share the experiences of this nature that we have accumulated in our various countries. One of the primary tasks of adult education is to help people overcome prejudice and hate. I am convinced of the truth of a conviction often expressed by an Israeli friend and adult educator, Rifka Pinnes: “Adult education can succeed where politics fail.” It is up to us to design strategies and find ways to make this happen, and hopefully help one another in our efforts. And we can only do so with any measure of success if we are acquainted with one another, if we are prepared to learn about each other and to get to know each other. Nothing sounds easier but is harder to do when it comes to reality.
I am confident that our mutual interest to promote adult learning will extend to other issues, just as it has in other parts in the world: remedial schooling, vocational training, business skills, ICTs, culture, all the issues which are in demand by people in the exercise of one of their inalienable fundamental human rights, the right to continue learning throughout life. Quite a few of these issues are of particular interest for the Mediterranean area. One example that comes to mind is that all your countries to a higher or lesser degree are attractive for international tourism. I have heard that more than 70% of the population of Malta is involved in one way or another in the tourist trade. Consequently, there is an enormous potential for gainful employment and training in this field, and certainly a lot of experience to share. I am sure that you will be able to identify other themes of common interest in our professional field.

But there are also common political concerns relating to our profession where you may want to explore possibilities of concerted action. Strengthening the position of lifelong learning is a tremendously important political issue, and I feel sure that in this region, as almost anywhere else, there is a great deal of territory that needs to be recovered for this field which is so crucial for any kind of economic, social, political, and cultural development. The Lifelong Learning concept of the European Union, the CONFINTEA V goals of the UNESCO Institute for Education, and the “Education for All” campaign of UNESCO and the World Bank all point to the need for strengthening learning opportunities and provision of adult education. Governments everywhere have demonstrated their agreement by signing corresponding declarations. But in most countries there is a huge gap between official declarations and actual government commitment to finance the sector. This, then, is an area for political action on our part. It is an issue that we must bring before the European Union, which excludes so many countries from funding opportunities that would promote Mediterranean cooperation. The major funding programme of the EU for the Mediterranean region, MEDA, concentrates to date on infrastructural and economic aspects, and does not consider educational issues or cross-country activities that would enhance learning.
opportunities for adults. Economic development, however, can never acquire sustainability without the involvement of the people through learning and training. We will go into this aspect in greater detail in the course of our conference.

There are few places in the Mediterranean where the characteristics of the region are so apparent as in Malta: the people are descendants of Phoenicians, Normans, Arabs, and Italians, who all came here as conquerors. The language is based on Arabic, the phonetics of which have been influenced by Latin and Greek, with an alphabet and grammatical structures derived from Latin.

Malta has a long colonial history, dating back to Phoenician times, pointing to origins in the Middle East, Canaan, and Lebanon. Contacts flourished between the Phoenician colony and the Greek cities and islands and the Orient. Already in 736 BC it was taken by the Greeks, who called it Melita. Subsequently it fell under the rule of Carthage, modern-day Tunis, and Rome, and, after the division of the Roman Empire, Byzantium, today’s Istanbul. In 870 the islands were occupied by the Arabs, and in 1090 by the Romans. It then became a Sicilian dominion, ultimately forming part of the realm of the Holy Roman Empire of German Nation which had its culmination of power and extent under Charles V of the house of Habsburg. Charles V graciously donated the islands to the order of Saint John, who maintained their influence in spite of the interests of the Ottoman Empire, but ultimately had to succumb to the power of the British, who maintained colonial rule over Malta until the sixties of the last century, in other words barely more than 40 years ago.

So I feel that we all can find something in Malta that relates to ourselves and our history and culture. For a Mediterranean conference, it is the perfect venue. I am very grateful for the support extended to us by our Maltese colleagues, in particular David Caruana and Peter Mayo from the University of Malta, which, by the way, is a venerable institution that dates back to the late 16th century. Let us hope for a few days of fruitful work, constructive dialogue, pleasant and valuable contacts, and new and enjoyable impressions.
Declaration

A Mediterranean Conference on Lifelong Learning, sponsored by the International Development Institute of the German Adult Education Association, was held in Malta between 13 and 15 September 2003. There were participants from the following countries: Algeria (two participants), Albania (three participants), Bosnia Herzegovina (one participant), Cyprus (two participants), Egypt (one participant), Greece (two participants), Israel (two participants), Italy (two participants), Jordan (one participant), Lebanon (one participant), Malta (three participants), Morocco (three participants), Serbia (two participants), Slovenia (one participant), Spain (three participants), Syria (one participant), Tunisia (two participants) and Turkey (one participant).

The conference consisted of a number of plenary sessions and workshops. The workshops focused on these three themes:
1. North-South/South-North relations in adult education
2. Multi-ethnicity and adult education
3. Motivation and lifelong learning with special reference to the Mediterranean

The members of the various workshops stressed the need for:
• the establishment of a Mediterranean Adult Education Network based on cooperation among NGOs, state agencies, universities, national and regional adult education associations, trade unions, social movements, and educational research institutions
• greater sensitivity to Mediterranean issues to be shown by larger entities such as the EU when devising their strategies concerning North-South and East-West relations in adult education; this network should foreground the adult education concerns of the Mediterranean in its entirety and place them on the policy making agenda of these larger entities
• support to be provided to organisations that do not derive funding from their own municipal, regional or national governments
the carrying out of activities of common interest to the various peoples of the Mediterranean; this would include:

1. adult education that provides an in-depth understanding of the different cultures present within the Mediterranean
2. adult education concerned with environmental issues with special concern for the way they impinge on different contexts within the Mediterranean
3. adult education to raise the level of literacy in the various countries and regions of the Mediterranean
4. opportunities for enhancing the education of adult educators in the Mediterranean
5. adult education for active citizenship predicated on the valorisation of social difference and bio-diversity

the creation of a Mediterranean ‘pool’ which would allow for the exchange of personnel and ideas concerning adult education emerging from the different countries of the Mediterranean; many providers of adult education within the Mediterranean require not only funding but also opportunities for an exchange of expertise and experiences deriving from this part of the world.

The proposed association would therefore:

- promote exchanges between adult educators and participants in adult education from the different countries of the Mediterranean
- promote the carrying out and dissemination of adult education research with a strong Mediterranean dimension
- hold conferences on a biennial basis in which research can be disseminated and workshops involving the exchange of experiences about policy and practice can be held
- hold occasional training programmes to enhance adult education practice in the different countries of the Mediterranean
- create a website which will be the repository of information concerning adult education in various parts of the Mediterranean
- support the production of material concerning different features of adult education in the Mediterranean; this would include books, special issues of journals, CD-ROMs, videos and teaching/learning kits.
Rita Süßmuth

Lifelong Learning, Adult Education, Employability

Dear Conference Participants,

I am sincerely grateful to you for the opportunity to speak to you at this conference on the occasion of the first regional Festival of Learning for the Stability Pact region. As President of the German Adult Education Association (DVV) I was delighted to become the patron of this event and very pleased to be able to accept the invitation of President Boris Trajkovskij to come to Skopje because I regard posi-
tive developments in this region as being of great importance for the future of a united Europe.

I have followed with great sympathy the initiative of organizing a “Festival of Learning” involving people from eight countries in the Stability Pact region and I hope that the event will give a boost to the expansion of dialogue and cooperation in the region.

I should like to thank all those who have played a part in the preparations most warmly for their commitment, and I hope that more and more citizens will have the chance to meet and get to know one another through similar cooperative ventures.

It is a major occurrence for the education ministers from the region to be meeting together here in Skopje. Even in Germany we have never achieved such a feat. It may be that this idea originated earlier somewhere else, but no one had as yet put it into practice. It seems to me that it is important that this initiative should not remain a one-off event, but should encourage a change of paradigm and lead to the recognition that “together we are strong”. A Festival of Learning like that being celebrated here in Skopje for the first time for the Stability Pact region strikes me as a particularly appropriate way of achieving this goal.

I think it is absolutely vital to help to create new relationships and identities by expanding encounters between people and encouraging them to learn from one another.

**Initial and Continuing Education for Economic and Regional Development**

The “Bologna Process”, under which higher education qualifications are to be brought into alignment by the year 2010 takes us back to one of the achievements of humanist Europe, when it was possible for students to choose the university that suited them best for the subject in which they were interested, without regard to nationality.
Europe has been forced to take this step if it is to maintain its commercial position in the world. If Europe wishes to grow stronger, we must work together for no country can today manage the future of such important matters as transport, communications or the chemical industry on its own. Education and educational policy can no longer be looked at purely in a national context.

But allow me to observe that given the scale of the problems, the answer will not be simply to update existing educational and social institutions to bring them into line with those in other countries. From a financial point of view alone, this process would far exceed the capacities of the states in the region, and indeed of the international community, including the European Union.

In view of the increasing pace of the worldwide exchange of information and knowledge, however, it will be increasingly difficult to achieve sustained economic and social development in the national context alone. New communication technologies make it possible to exchange complex data sets almost instantaneously, and improved road and rail links and the opening of borders encourage the growing mobility of people and goods. With further technological progress, decisions on where to locate businesses will depend less than now on the availability of natural resources.

Continuing Education and Globalization

This development brings both opportunities and dangers. Areas which have until now seen little economic development on account of their geographical situation or the lack of mineral resources may now experience a powerful upsurge. Traditional industrialized countries, on the other hand, among them of course the Federal Republic of Germany, may well find within a few years that because of technological change, industrial centres are increasingly turning into depressed areas with high unemployment.

The development trends summed up by the term “globalization” are having an immense impact on economies and societies throughout
the world. The availability of well-educated, motivated people will be a key factor for successful economic and social development.

We know that education has traditionally been given high priority in the societies of South Eastern Europe and that many people have a high level of education. This region has contributed greatly to the development of European adult education. In Bulgaria, Romania and the states of the former Yugoslavia there was a dense network of workers’ and people’s universities, cultural centres, reading rooms and continuing education facilities within enterprises which offered wide sections of the adult population opportunities for continuing education and vocational training.

Many of these institutions were destroyed in the 1990s in the wake of armed conflict and the effects of transition. But much survived, and much more has been newly created in the last few years. With the financial support of the Federal Government, the German Adult Education Association (DVV) has, through its Institute for International Cooperation, been among those trying to rebuild adult education institutions or to strengthen their operations.

I note with great concern, however, that the national education systems in the region appear to be developing only a limited ability to create stable social institutions. One indicator is the shockingly high unemployment in the region, which reaches a rate of 60% in many areas and particularly affects young people and young adults.

It seems to me that there is an urgent need to give these young people credible prospects for the future. One important question will be how to translate university knowledge into the creation of jobs. Young people will hardly be motivated to pursue initial training and continuing education if they are uncertain of securing a livelihood in the long term because of poor employment prospects.

However important national identity may be, the future lies in crossing borders in order to create added value through synergy. One of
the meanings of globalization is linking smaller regions to a larger grouping.

One way of doing this may lie in the notion of “learning regions”, in which the social partners conduct joint projects in order to achieve positive developments. In order to provide a few examples from practice it would be sensible to select a few rural regions and to create successful projects there which may serve as “beacons of hope”.

**Let me mention a few existing examples.**
With the aim of combating poverty a priest set up a network of educational institutions in the region of Mondragon, near Bilbao, in which schools, the university and businesses formed a close alliance. We may now think the cooperative model chosen in this case outmoded, but unemployment in the region now stands at one per cent.

Another good example of how a country can quickly find its way out of economic crisis by investing in education is Finland. Educational initiatives were concentrated in rural areas, focusing on shortcomings identified through analysis, in order to facilitate learning in small groups, particularly for young men.

In Denmark again there is a system of linking training and jobs, in which social providers are involved at regional level.

Of course, schemes like these cannot be created in a couple of years. But I think it is important that successes have been achieved through long-term, holistic approaches made possible by the willingness of a wide range of social providers to cooperate.

**Democratization and Discovery of Identity**

This raises the significant question of “what” is to be learnt and “how”. We face a dilemma: the higher the rate of unemployment rises, the lower will prove the interest in continuing education and training. How can we break out of this vicious circle?
In order to find an answer to this question, we should no longer look backwards and ask, “What kind of world am I starting from?” but we should debate the question, “What kind of world are we learning for?” If we are to involve as many people as possible in finding sustainable solutions to the creation of individual living spaces within stable social institutions, we need above all to be open to innovation and creativity, and to be prepared to take the initiative and demonstrate solidarity.

We must also recognise that the values of democracy and the market economy are not self-explanatory. They have to be learnt and experienced through opportunities for involvement. We may therefore conclude that the building of identity is a key aspect of shaping future economic and social institutions. Democratization, or “Education for Democratic Citizenship (EDC)” must be thought of as an integral part of social policy. “Personality development”, “acquisition of social skills” and “promotion of employment” must be indissolubly linked and form fundamental principles in the shaping of the teaching process.

Positive economic development requires political participation. Without people, and without their willingness to become the vectors of social development, there can be no stable economic development. But motivation and commitment can only be created where social institutions give people the opportunity to play a part in decision-making. Their creativity and talents can be exploited for social development as long as they can enjoy their rights as emancipated citizens, as well as perform their obligations.

To whoever says that this is a huge task for adult education I would reply that adult education must face up to this task and that it can be done.

Any number of ideas may come “from the top down”, but if they are to be implemented, people must go along with them. The decisive changes are made by people; politics only creates the framework. If people feel that they are powerless, then nothing will happen. We
therefore need to encourage project-based learning in order to create local initiatives. Only then can politics provide the support.

**Adult Education as Part of the Concept of Lifelong Learning**

So far, however, at most five to ten per cent of the population have access to opportunities for lifelong learning. Moreover, there is still a lack of clarity over where adult education fits in between basic, general and higher education.

The ability to find one’s way and take the right decisions in complex situations is becoming a prerequisite for active participation in social processes, and for long-term employment and security of income. Promotion of the development of the personality, in the sense of the mutual relationships between the individual and his or her surroundings, is a necessity for an understanding of each person’s role in social contexts. Words such as “globalization”, “rapidity” and “change”, which are frequently tinged with anxiety, lose their terrors if they can be related to personal experience. This skill must be learnt and further developed, particularly since inherited social institutions are becoming more and more different.

Adult education is especially important in the context of “lifelong learning” because it can create bridges. The basic, vocational and higher education enjoyed in youth will not suffice on its own to teach all the knowledge which people need throughout their lives if they are to keep abreast of the level of contemporary knowledge that is actually needed in their private and working lives.

Since adult education already contains a second-chance element, it has extensive experience in these areas. Adults learn by slotting new knowledge into what they know from experience. This has now turned into a difficult process of relearning, and of reconciling prejudices and stereotypes with new impressions. It is this learning based on reflection that is one of the distinguishing marks of adult education:
by comparison with children, adults can translate what they learn far more swiftly into changed behaviour and practical action.

This is particularly important because trends of economic development are becoming ever harder to predict. Given the current pace of change, it is difficult to say what kinds of adult educators will be required in a few years’ time. It will therefore be complicated to determine demand for education in advance.

For the planning of learning this means giving people the skills which will enable them to develop judgmental ability based on their own experience of life. When applied and participatory learning are adopted, responsibility for the outcomes of learning must be placed in the hands of the people who will use it later. One objective should be to enable learners to anticipate their own educational needs, to set their own individual learning goals, and to organize for themselves how they acquire knowledge.

While it is a duty of education for children and young people to create motivation for "lifelong learning", so that "learning to learn" becomes a major objective of basic education, adult and continuing education has the task of maintaining and enhancing this motivation. It has a significance today that is quite different from that in a predominantly reproductive world.

This will in my view be one of the main tasks for the further development and implementation of the concept of “lifelong learning”. It will therefore be important to recognise formal, non-formal and informal forms of learning as having equal value within the education system. Adult education must become an integral part of the education system in order to provide a firm foundation for the realization of the concept of lifelong learning.

Education systems which fail to take advantage of the potential of learners’ experience by bringing together people of differing backgrounds, social status, gender and age, waste a large amount of creativity and ability to influence the future shape of society. This means,
in the spirit of the “Education for All” (EFA) programme sponsored by UNESCO, of CONFINTEA, and of the European Union “Memorandum on Lifelong Learning”, that all sections of the population and all age groups should be guaranteed access nationwide to training and continuing education. Particular attention should be given to those who have had no chance because of war and expulsion to complete school and vocational qualifications.

Equality between Women and Men

Let me stress one point here: despite undeniable progress, there is still a long way to go before men and women are universally equal. In many parts of Europe, women are still at a disadvantage in gaining access to good-quality education, and to senior positions in politics, society and employment.

Education is the prerequisite for participation by women. Cooperation is necessary if they are to achieve social integration. Women must in effect be fetched – not merely given an invitation. It is not the transmission of knowledge that is the problem, but the integration of women against a background of differences in cultural identity. The first thing is therefore to examine where these are to be found. In order to facilitate access for women, women’s magazines should be won over to the long-term task of equality: the media are more influential than we think. Even in Germany, changes in social awareness occurred only slowly, but in the 1980s there was a leap forward because the topic of equality received greater attention.

In the light of these experiences permit me to say that if we intend to overcome the challenges facing us, we can no longer afford to dispense with women’s creativity and ability to shape events for reasons of gender-specific discrimination.

Funding of Initial and Continuing Education

However much the slogan of the “information and knowledge-based society” of the 21st century may dominate conference debates and
symposia, we have to recognise that the structures needed to implement it are being weakened at the same time.

In its Memorandum on Lifelong Learning the European Union may have an action plan for a coherent policy on continuing education and training, but discussions based on it also show how great are the differences between regions in respect of the practical implementation of statements of theory.

In the implementation of the UNESCO-sponsored “Education for All” programme (EFA), there is also a noticeable tendency to leave adult education largely out of the picture, or at least to treat it as of lesser importance. However, it is one of most prestigious tasks of any state to educate its citizens. “Lifelong learning” must be more widely perceived as a public responsibility and must become an integral part of the public education system.

I suggest that there are weighty arguments for treating adult and continuing education with the same priority as basic education for children and young people:

● Education is invariably a form of preventative social care. If people are given the tools to manage their lives for themselves, they will be less of a burden on the social system.

● Small business start-up and micro credit schemes such as those set up by many international sponsors in the Stability Pact region and elsewhere to promote employment and the economy need participants to have an essential knowledge of commerce and a social appreciation of enterprise as the driving force of economic development.

● It will be twenty years before children and young people now receiving training become the decision-makers who will have to solve problems. But experts are needed now to find solutions using current levels of knowledge. Through adult education, it is possible to react more flexibly to the problems that are identified.

If a legal framework is created which offers state and non-governmental educational institutions a reliable basis for operations, substantial
support can also be given for the integration of the adult education sector into the education system.

The same applies to equality of types of learning and to mutual recognition of formal qualifications. Greater transparency would expand the ability to move between pathways within the education system, increase efficiency and enhance quality.

We must make great efforts to persuade politicians and society to make the requisite funds available to guarantee and further develop existing schemes.

However, we observe a worrying tendency to subject initial and continuing education to cost-benefit analysis. Holistic approaches to education based on consideration of people’s mutual relationships with their surroundings are, on the other hand, losing ground. A broad education means just that; it is not a side-show.

**International Cooperation**

Following the decisions taken at the EU summit meeting held in Thessaloniki in June 2003, the countries in the region now have the option of joining the European Union. But we shall only be able to bring this notion of a united Europe to life if it is supported on all sides by a willingness to cooperate and if it aims to enable people to meet and exchange ideas with mutual respect and with consideration for each other’s cultural identity. Learning languages is an indispensable tool for this, and an important foundation. We find that English already accounts for 30% of communication at the workplace in Europe, even though we must not allow mother tongues to be neglected.

Adult education should therefore focus on two areas: on self-assurance – “Where have we come from?” – and on understanding for the future. Perhaps it is still too early for rapprochement and reconciliation. But solidarity must be developed, and this implies a willingness to come together across borders.
Europe has learnt that growing together calls for regional relationships and variety, albeit on the basis of shared fundamental values. Since Europe is becoming more diverse through the influx of new ethnic groups and cultures, it is increasingly important to teach universal human values. The reference to national traditions, religion and culture in our inherited understanding of what it means to be a citizen has often hidden a latent tendency to cut ourselves off from anyone different.

I am depressed to see countries in the region digging in behind their national borders. There is no need to point out what a potential threat this poses to European unification. Radicalism of every kind flourishes wherever people have little feeling of self-worth.

In view of the tasks before us and the resources for project funding that are shrinking overall, the German and international sponsoring organizations will need to achieve synergy effects through concerted action and cooperation in project activities. We shall not be able to go on convincing our partners of the effectiveness of our projects in the long term unless we can demonstrate that we are able to coordinate our planning with the substance of our activities, to the benefit of the people in the region.

If only because of the historical importance of the Balkan region and South Eastern Europe as a bridge between West and East, we shall continue to watch with great attention the future economic and social development of the countries in this region.

I hope that this conference will put forward practicable ideas for increased cooperation in the region which will give the people in the region new opportunities for initial and continuing education, employment and an equal share in the development of society. I should regard this speech as poor if it were seen as encouraging a race between countries to join the European Union.

I wish the conference every success and say to you: Do not be down-hearted by the problems of everyday life.
The Ministers of Education and Higher Education of South Eastern Europe

Declaration

The Ministers of Education and Higher Education of South Eastern Europe agree on the need to strengthen regional cooperation in the field of adult education as a key issue for economic and social regeneration in the region, building on existing international and European documents.¹

They stress the importance of adult education aimed at establishing a knowledge based society throughout Europe as laid down in the conclusions to the Lisbon European Council meeting.

South Eastern Europe being part of the evolving wider area of education, it requires particularly rapid development in the adult education sector since the economic problems facing the population in societies in transition in South Eastern Europe can only be resolved through improved education. The increased pace of change in the world of work, the complete transformation of some job profiles and the political demands made on enfranchised persons call for new approaches in education policy. Lifelong Learning is the appropriate response to the constant growth in human knowledge and the speed of the information flow, and is of direct benefit to people, helping to turn them into a skilled and flexible workforce.

The Ministers recognize the efforts undertaken so far to achieve greater coherence between the goals of Education for All,² Adult Education³ and Lifelong Learning, and to strengthen the role of adult education within the wider concept of Lifelong Learning. The Ministers

---

¹ In accordance with the Memorandum of Understanding, signed at Nicosia, Cyprus on 28 June 2003 on the occasion of the Seventh Conference of European Ministers of Education, according to which lifelong learning outcomes are one of the main benchmarks for education systems, and taking note of the Sofia Call to Action, issued on 9 November 2002 at Sofia, Bulgaria.
² Forum on Education for All (EFA), Dakar, 2000.
³ 5th UNESCO International Conference on Adult Education (CONFINTEA V), Hamburg 1997.
declare their strong support for the South Eastern Europe Education Reform Initiative.\footnote{Building on and acknowledging the achievements of the Enhanced Graz Process/Task Force Education and Youth of the Stability Pact for South Eastern Europe.}

Within this framework they declare their intention to commit themselves to the following goals:

- Ensuring that adult education and vocational training become an explicit and integral element of Lifelong Learning policies and practices
- Supporting the establishment of the necessary legal framework and mechanisms
- Securing adequate financial support for sustainable adult education and vocational training development
- Fostering partnership between statutory, non-governmental and social partners to address different adult learning needs and to promote active participation in society
- Ensuring and promoting equal opportunities and access to quality education for ethnic minorities and socially disadvantaged groups
- Enhancing the application of gender sensitive policies in the provision of adult education
• Supporting quality development and certification of adult education and vocational training programmes in recognition of formal and non-formal adult learning

• Coordinating adult education and vocational training activities in order to develop the sector to take account of the social and political needs of Lifelong Learning

• Creating a system for recognising existing and newly emerging qualifications, diplomas and certificates throughout Europe, within and across national/territorial boundaries,⁵ thereby improving the transparency and supporting the development of skills and qualifications

• Including adult education as an important part of teacher training

They have identified the following priority instruments to further enhance cooperation in adult education and vocational training in the Region in order to contribute to peace and reconciliation in the Balkan Region:

• Development of improved channels of communication between institutions and governments within the countries of the Region

• Expansion of exchanges of learners, adult educators and scientists in order to enrich policy and practice in adult education

⁵ e.g. by introducing the European Credit Transfer System.
• Support for existing networks in their efforts to build capacity and strengthen the dissemination of information on adult education development and reform in South Eastern Europe

The Ministers agree to the following action plan to be carried out by the end of 2005:

1. Establishment of a separate department/responsible persons in every Ministry of Education responsible for adult education and lifelong learning
2. Provision of a legislative framework for adult education and lifelong learning, including a law on adult education
3. Creation of wider opportunities for andragogical studies in every country or territory and in the whole Region
4. Organization of at least two follow-up meetings at expert level to report on activities and outcomes, and to exchange experience in adult education.

Skopje, 18 October 2003

For the Ministry of Education and Science, Republic of Romania
Vasile Molan
Head of Department

For the Ministry of Education and Science, Republic of Macedonia
Dr. Zoran Popovski
State Secretary

For the UNMIK / Provisional Institutions of Self-Government (PISG)
Dr. Johann Schrumpf/Venera Llunji
Ministry of Education, Science and Technology of Kosovo

For the Ministry of Education and Science, Republic of Croatia
For the Ministry of Education and Science, Republic of Bosnia and Herzegovina
For the Ministry of Education and Science, Republic of Albania
Saemira Pino-Gjipali
Deputy Minister

For the Ministry of Education and Science, Republic of Montenegro, Serbia and Montenegro
Radovan Damjanovic
Deputy Minister

For the Ministry of Education and Sport, Republic of Serbia, Serbia and Montenegro
Dr. Želimir Popov
Deputy Minister

For the Ministry of Education, Science and Sport, Republic of Slovenia,
Marjan Šiftar
Ambassador