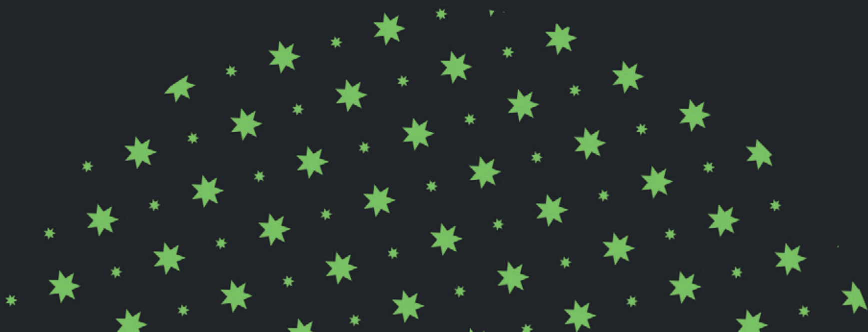
IN PURSUIT OF A LIFELONG LEARNING SOCIETY

A Historical Analysis of Lifelong Learning Policy Discourses from Major International Organizations

MOOSUNG LEE



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A Historical Analysis of Lifelong Learning Policy Discourses from Major International Organizations

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INVESTOR IN PEOPLE

CONTENTS

Acknowledgment *vii*

1. Introduction: Lifelong Learning Policy Discourses of International Organizations 1
2. UNESCO's Lifelong Learning Policy Discourse: An Enduring Social Democratic Liberalist Project of Global Educational Development 11
3. Two Landmark Policy Texts of Lifelong Learning: The Faure Report as Foundation Stone and the Delors Report as Architectural Blueprint 45
4. OECD's Role in the Lifelong Learning Policy Arena: Neoliberal Management of Lifelong Learning Through Policy Prototype and Infrastructure 63
5. The EU's Engagement in Lifelong Learning Policy Discourse: An Institutional Learning Perspective 79
6. Conclusion: Self-Helping Society vs. Learning Society 105

References *123*

Index *141*

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1

INTRODUCTION: LIFELONG LEARNING POLICY DISCOURSES OF INTERNATIONAL ORGANIZATIONS

ABSTRACT

This chapter sets the scene for this book, which aims to illuminate the policy discourses of lifelong learning articulated by major international organizations in the field of global educational governance. Indeed, the terrain of lifelong learning policy discourse is an evolving entity, constantly transformed through struggles with other discourses among international organizations. Among the many international bodies, three international agencies have been key players in (re)shaping lifelong learning policy discourses: UNESCO, the OECD, and the EU. The essential thrust of this book is to trace the historical evolution of lifelong learning policy discourses by the three intergovernmental organizations from a comparative perspective. In line with this purpose, this chapter provides the research context of the key theme of this book, discusses the significance of the research, and details the methods used in the investigation.

Keywords: Lifelong learning; policy discourse; international organization; UNESCO; OECD; EU

1. INTRODUCTION

Lifelong learning has been a core part of human life ever since humanity has existed. As Brown (2000) points out, the concept of lifelong learning is implied in Chinese proverbs, Buddhist philosophy, Islamic letters, and elsewhere. In terms of its later-institutionalized form, one of the earliest ideas of lifelong learning was first fully articulated by Basil Yeaxlee who was an official of the Adult Education Committee of the Ministry of Reconstruction in Britain in 1919. He spoke of the growing demand for "education as a lifelong process" (Field, 2000, p. 5). Only in the late 1960s, however, has the idea received recognition by policymakers and broad attention by the intergovernmental organization such as UNESCO. Back in the 1960s and the 1970s, UNESCO first ignited international discussion of lifelong learning in the context of adult education – i.e., UNESCO's humanist version of learning throughout life. During the late 1960s and early 1970s, UNESCO emphasized lifelong education for "reorganizing all areas of life to establish a broad, learning friendly social environment and to mobilise pedagogic potential of all persons" (Dohmen, 1996, p. 17). This approach to lifelong learning, the so-called maximalist concept of lifelong learning, regarded lifelong learning as involving a fundamental transformation of society, so that the whole society becomes a learning resource for each individual (Aspin & Chapman, 2000, p. 2). This was followed by the Council of Europe's idea of permanent education, ideologically rooted in the primary values of the 1789 French Revolution, and the OECD's recurrent education, closely linked to labor and employment (Dohmen, 1996; Finger & Asún, 2001; Lee et al., 2008). Since the 1990s, the European Union has also joined the international discussion on lifelong learning through its policy texts and events while UNESCO and the OECD have remained key players in the policy arena. By the early 2000s, the EU's lifelong learning policy had been established and institutionalized as a comprehensive educational reform policy aimed at addressing a wide range of issues, including education, employment, and competitiveness (Lee et al., 2008). In summary, lifelong learning policy discourses, as a central component of global educational policy development, have been critically shaped and nurtured by the aforementioned international organizations over the past decades, underscoring the significant influence these organizations exert on global issues (Lee & Jan, 2018).

Reflecting on the shifting landscape, the central question examined in this book is: "How have the policy discourses of lifelong learning, as shaped by UNESCO, the OECD, and the EU, evolved over time?" To delve into the question, the following section outlines the research methods used in this

book: documentary research based on discourse analysis for historical comparison. It explains the analytical approach to policy as discourse (Olssen et al., 2004). Here, discourse is conceptualized as (1) a particular way of being in the world that involves language use, (2) a form of social practice, and therefore (3) both uses and effects (Fairclough, 1992; Olssen et al., 2004). From this perspective, policy discourse analysis interrogates how policy texts, as discourse, are politically and ideologically inscribed – imbued with a particular political and ideological stance (Lee & Friedrich, 2011) – because discourse is ideologically motivated and generated within power relations (Fairclough, 1992). To further link policy discourse to ideology as conceived in policy texts, the following section also briefly reviews four competing ideologies that have influenced educational policy discourses.

2. POLICY AS DISCOURSE

This book is based on documentary research by employing policy discourse analysis. This section provides a brief discussion about the analytical approach to policy as discourse.

2.1 Conception of Discourse

Discourse has been defined in various ways. In particular, scholars from social-institutional perspectives and those rooted in linguistic traditions have placed differing emphases on discourse in their definitions. Nonetheless, both share a common premise: discourses are socially constituted, shape individuals' lived experiences, and are therefore dynamic. Both have also regarded discourse as a valid means of studying postmodern lived experience (Lee & Friedrich, 2011).

From social-institutional perspectives, Foucault defines discourse as follows: "Discourses embody meaning and social relationships; they constitute both subjectivity and power, of which they speak" (Foucault, 1974, p. 49). In this sense, "discourses are about what can be said and thought, but also about who can speak, when, and with what authority" (Ball, 1990, p. 2). According to Foucault, individuals can become so deeply embedded in dominant discourses that they neither question the prevailing values nor recognize how much they themselves are naturalized into these discourses. On a subtler level, dominant discourse determines "the historical specificity" of what can be articulated as proper language and what is excluded as dialect or slang, even

though the world is experienced differently within various discourses (Ball, 1990; Matheson & Matheson, 2000). Ball further explains:

> ...the possibilities for meaning and for definition are pre-empted through the social and institutional position of those who use them...Words and concepts change their meaning and their effects as they are deployed within different discourses. Discourses constrain the possibilities of thought. They order and combine words in particular ways and exclude or displace other combinations. (1990, p. 2)

That is, from a Foucauldian perspective, discourse is a particular way of understanding the world. For Foucauldian, discourse is considered material reality because discourse produces both subjects and social practices. Every social practice, insofar as it produces meaning, can be regarded as discourse from. Consequently, there is little that exists outside the discursive realm. Social practices contribute to the exercise of power by producing meaning. According to Foucault, power operates as a mechanism that regulates how we act, think, or speak – what can be done, what can be thought, and what can be said – and, conversely, what cannot (Foucault, 1974). In other words, power is a mechanism that governs the ways in which we speak, think, and act in specific manners. This is referred to as the power of discourse. This power of discourse, which regulates us in specific ways, mobilizes knowledge within the field of discourse. Thus, power is legitimized by knowledge, and power, in turn, produces that knowledge. Similarly, Gingell and Winch (1999) state, "discourses are articulations of power and domination" (cited in Matheson & Matheson, 2000, p. 1). Power in discourse should "not be understood as exclusively oppressive but as productive" because power is always "bound up with knowledge-power" and power is closely connected to discourse (Phillips & J¢rgensen, 2002, pp. 13–14). For example, it is difficult to imagine the justification and implementation of modern schooling system without modern pedagogy. In this regard, Bacchi notes that discourses are "what a subject is able and permitted to say" (Bacchi, 2000, p. 51); a subject is not just the creator of discourse but the other way around is also possible; discourse creates a subject, who is shaped by and subjected to discourse.

From socio-linguistic perspectives, Gee (1996, p. 127) describes discourse as a "way of being in the world." Gee (1996, p. 131) further defines it as a "socially accepted association among ways of using language, other symbolic expressions, and artifacts, of thinking, feeling, believing, valuing, and acting." Similarly, Fairclough (1992, p. 64) frames it as a "mode of action." In this regard, discourse represents a particular way of being in the world that

involves "language use." Events in which this relational perspective materializes inherently involve language use. Fairclough (1992, p. 63) goes further to frame that discourse is "language use as a form of social practice" that is "constituted and constitutes dialectically." This dual nature means that discourse refers to and signifies social structures, serving as both a condition for and an effect of these structures. In so doing, Fairclough attempts to combine social-institutional perspectives and linguistic traditions in conceptualizing discourses. Therefore, for Fairclough, articulating discourses is a social practice in the sense that it is "produced, consumed, and distributed" (Fairclough, 1992, p. 71) where the discourse event becomes a contextual effect. In his late work, Fairclough (2003) notes, discourse is rule-governed yet has a partially open structure. This perspective resonates with the concept of Foucault and Bacchi, respectively (Lee & Friedrich, 2011). Foucault viewed discourse as "controlled, selected, organized and redistributed according to a certain number of procedures" or rules (Foucault, 1972, p. 222). Similarly, Bacchi highlighted that discourse does not present an inflexible set of values but is instead partially open, functioning as an "interpretive repertoire" (Bacchi, 2000, p. 53), which, in turn, allows room for "fresh propositions" (Foucault, 1972, pp. 22–23). In summary, discourses or discourse events are, therefore, contextual effects involving language use. Because they are politically and ideologically invested, discourse events tend to be mostly contextual effects.

2.2 Policy Discourse Analysis

Policy is discourse since both discourse and policy share common features. As discussed above, discourse is a particular way of being in the world that involves language use. A discourse is taken up by people in events, "a condition for, and an effect of" social structure (Fairclough, 1992, p. 71); therefore, it is also a form of social practice. Just as how society is organized reflects particular ways of manipulating power and privileges certain "values and viewpoints about the relationships between people and the distribution of social goods" (Gee, 1996, p. 132), a discourse is, respectively, political and ideological. Also, like social structure, a discourse is intertextual and unstable. Each discourse "tastes" of others it resembles, comes into conflict with, and so on (Bakhtin, 1981; Fairclough, 1992, pp. 125–128). Particular uses of discourse struggle more or less rigorously with a discourse's rules, potentially making it new. In addition, as Barthes (1987, pp. 53–54) notes, discourse uses that mimic historically produced effects are "dead" while those that take up

the "enterprise of vacillation" of refusing mimicry draw close to and possibly achieve transformative use, to telling the "real story" of dynamic, lived phenomena. This is to say, discourse events can be more and less like historically produced effects (Lee & Friedrich, 2011).

Policy is discourse because similar claims about policy can be made. Olssen et al. (2004, p. 3) argue that policy is "a politically, socially and historically contextualised practice or set of practices." Thus contextualized, policy does not neutrally express information and ideas as a means of establishing a "correct interpretation" (2004, p. 60) but often functions as a "technology of control" (2004, p. 14). At the same time, because it is contextualized politically, socially, and historically, policy can let us "see relations between individual policy texts and wider relations of the social structure and political system" (2004, p. 71). As discourse, policy is a social practice embodying a particular political and ideological stance. At the same time, policy is an intertextual, unstable means for creating social change because it is materially tied to lived reality through the processes of production, interpretation and distribution (Lee & Friedrich, 2011).

For policy analysts who adopt a discourse perspective, the view of lived social reality as flexible, distributed, and contested makes the conventional practices of providing specific policy recommendations or advocating particular policies on the basis of measurable policy effects on various populations highly suspect. The policy practice of making recommendations based on reliable measurements is legitimated by the positivist assumption that knowledge is "context-free," or absolutely true and neutral. This assumption is rejected by policy-as-discourse analysts who see policymaking as ideological, political activities. The primary purpose of policy-as-discourse analysts is to study the language of policy texts to reveal "the values, assumptions and ideologies underpinning the policy process" (Olssen et al., p. 72). Policy-as-discourse analysis also focuses on exploring "the material conditions within which such [policy] texts are produced" and "the institutional practices which they are used to defend" (Olssen et al., 2004, p. 72). Therefore, in using policy-as-discourse in this study, I focus on revealing the discursive constructions of actors within the three international organizations, along with the particular politico-economic conditions they inhabit, through investigating the agency's principal lifelong learning policy discourses.

In this book, I use policy-as-discourse to uncover the ideological influences on international organizations' lifelong learning discourses. This is because discourse conceals ideology (Olssen et al., 2004). An ideology is a framework of meanings and values that creates social cohesion among a group or society's members, who nevertheless retain some capacity to revise their identities, the

institutions and discourses they inhabit and extend. Therefore, by uncovering what ideologies have been embedded in educational policy discourses, I aim to reveal the assumptions embedded in lifelong learning discourse in the interest of realizing good policy and supporting social justice. To begin, several ideologies mark the terrain influencing the lifelong learning policy discourse of international organizations. Four dominant, modern Western ideologies permeate educational policy discourses today: classical liberalism, neoliberalism, social democratic liberalism, and (neo) Marxism. The first three dominant ideologies are historically rooted in European liberalism, an overarching political and economic ideology that has influenced individuals' thought and forms of state organization since the 18th century in European nations such as England, France, Germany, and Italy (Laski, 1936; Ruggiero, 1927). As specific forms of European liberalism, classical, neo-, and social democratic liberalism all (1) value individual (and sometimes collective) freedom and development, (2) view one display of that freedom as market participation, and (3) promote the maintenance of social order through the exercise of representative democracy. As a counterpoint to liberalism, the fourth ideology is Marxism, which (1) values individual and collective development, (2) criticizes the rule of capital as perverse social logic, and (3) views the practice of freedom and democracy as popular rule (Lee, 2007; Lee & Friedrich, 2011).

More extensive discussion of each of these ideologies is in order. The first type, classical liberalism, sees the focus of education as the individual who can be improved into an asset for her or himself. Classical liberalism is firmly based on a philosophical tradition deriving from Hobbes through Locke, Hume, Smith, and Bentham. In general, these philosophers regard individuals as self-interest maximisers who act with free, rational choice (Olssen et al., 2004). Thus, education is viewed as a principal, private good for individual enlightenment, empowerment, and development (see also Bagnall, 2000 for ideological frameworks analyzing lifelong learning discourses). Classical liberalism, under the influence of capitalism, partly influenced the birth of modern schooling in the Western European countries in the 19th century as an instrument for producing a compliant, semi-educated labor force (Lee, 2007; Lee & Friedrich, 2011).

The second type, neoliberalism, sees the focus of education as the individual, who can be improved into an asset for participation in the market ruled by capital. Neoliberalism has been principally supported by sundry influential, economy-oriented theories and perspectives such as vocationalism, economic rationalism, monetarism, professionalism, human capital theory, public choice theory, agency theory, and management theory. This means that neoliberalism is not a homogeneous ideological entity (Olssen et al., 2004). Still, with Hayek

and Friedman as its foremost advocates, neoliberalism takes education to be an exchangeable, private commodity for enhancing individuals' competitiveness and employability for which individuals should pay. As such, education is also exclusively viewed as a positional good for occupying improved socio-economic positions (see Hirsh, 1995). In addition, neoliberals want the state to play a "reduced role" in providing educational opportunities so that a "maximization of the market" can occur (Olssen et al., 2004, p. 136). This politically conservative, economically liberal role for the state in education was endorsed by the Thatcher government in the United Kingdom and the Reagan government in the United States in the 1980s (Lee, 2007; Lee & Friedrich, 2011).

The third type of liberalism, social democratic liberalism, sees the focus of education as individuals and the collective who can be improved into greater assets for one another within a representatively democratic state. Broadly, social democratic liberalism values "individual" liberty as a means of humanizing people who have experienced distorted social structures, but it also contends that social progress is won through collective efforts. Thus, social democratic liberalism tries to find the solution for humanization in two ways: through the positive intervention by a welfare state, or through highlighting civic participation and active citizenship. Emphasizing values of equity, justice, and fairness, social democratic liberalism views education as a significant public good that is a positive form of state intervention or welfare (Olssen et al., 2004). Social democratic liberalism is not, then, in opposition to capitalism, pursuing a welfarist society mainly based on the Keynesian market model (Olssen et al., 2004). In general, social democratic liberalism has been prominent in the educational systems of the Scandinavian countries over the last half century (Lee, 2007; Lee & Friedrich, 2011).

The final type, (neo) Marxism, sees the focus of a just education as individuals and the collective, who could be improved into greater assets for one another. From a Marxist perspective, an unjust education is an element of the superstructure and an instrument of the dominant class that is a necessary object of ideological critique (Althusser, 1969). That is to say, education is seen as a public good controlled by people themselves rather than the state, with state-run education often being seen as an instrument of the dominant class (Epstein, 1983; Rikowski, 2004). Marxist educational thought was welcomed and glorified in the former Soviet Union and Eastern European countries during the Cold War, although orthodox Marxism was dogmatized in those countries to serve as an instrument of their dominant political classes. In response to this crisis in Marxism, neo-Marxist critical theory of the Frankfurt school and critical pedagogy arose and became influential in