Learning Through Life: the implications for learning in later life of the NIACE Inquiry

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Abstract

The article discusses implications for learning in later life of the recently published report Learning Through Life of the independent Inquiry into the Future for Lifelong Learning, established by the UK National Institute of Adult Continuing Education, of which the author was director. The report analyses key demographic, economic and social drivers and makes ten recommendations. This article concerns itself with two pivotal recommendations: 1) lifelong learning policy should be based on a new life-course model with four key stages (up to 25 years; 25 – 50 years; 50 – 75 years; over 75 years); 2) financial resources should be re-balanced fairly and sensibly across these four different life stages. The report estimates that the current spend on lifelong learning in the UK is around £55 billion, excluding opportunity costs, and that the proportions spent on the four stages are in the ratio 86: 11: 2.5: 0.5. It argues for a shift in allocation across the four stages, to approximately 80: 15: 4: 1 by 2020. The third and fourth stages of life would be major and appropriate beneficiaries and significant changes for learning in later life by UK citizens would be possible. The article discusses the changes, including new thinking about a curriculum for learning in the fourth stage of life.

Background to the Inquiry

This article considers implications for learning in later life of the independent Inquiry into the Future for Lifelong Learning which was set up in the United Kingdom in 2007. The Inquiry published its main report, Learning Through Life, in September 2009 (Schuller & Watson, 2009). The Inquiry was sponsored not by government but by the National Institute of Adult Continuing Education (NIACE) which is the key member-led, non-governmental, organisation concerned with adult learning in the UK. It supported the Inquiry, from its own reserves, with a budget of one million pounds. NIACE appointed a Commission of experts, who had a wide range
of lifelong learning expertise, and gave them terms of reference to produce an authoritative and coherent strategic framework for lifelong learning in the UK over the next 10–15 years. This would involve:

- articulating a broad rationale for public and private investment in lifelong learning
- a re-appraisal of the social and cultural value attached to it by policy-makers and the public
- developing new perspectives on policy and practice

The Inquiry sought to make an analysis of the major gaps in the current system but refrained from critiquing specific current policy, except in cases where it had a particular consequence for longer-term systemic thinking.

**Key themes and procedures**

The core of the Inquiry’s work was a set of nine themes, namely:

- Prosperity, Employment and Work
- Demography and Social Structure
- Well-being and Happiness
- Migration and Communities
- Technological Change
- Poverty Reduction
- Citizenship and Belonging
- Crime and Social Exclusion
- Sustainable Development

For each theme, a Call for Evidence was issued. This resulted in over 250 submissions from a wide range of sources: researchers, professionals in the field and individuals. A day-long seminar was organised around each theme, with a set of papers from different experts. In each case, the results of the seminar were brought together with the evidence submitted and synthesised into a Thematic Paper, written by a member of the Inquiry Secretariat or a Commissioner, and circulated to a reference group for critique and comment. The Thematic Papers were published electronically and in hard copy. The key conclusions from the Thematic Papers were selectively woven into the Inquiry’s report (Schuller & Watson *ibid*).
Vision and values

In setting out its vision and values, the main report of the Inquiry makes it abundantly clear that its concern is with learning throughout life. The Inquiry’s vision is of a society in which learning plays its full role in personal growth and emancipation, prosperity, solidarity and global responsibility. We believe that it is intimately connected with the achievement of freedom of choice, health and wellbeing, dignity, cultural identity and democratic tolerance. As a consequence, we begin from the premise that the right to learn throughout life is a human right.

This vision is based on a number of assumptions and values, namely that

- People are natural learners, but need different kinds of services at different points in their lives
- Inefficiency means that human potential is wasted
- Equality and fairness are fundamental
- Learning has to do with power, for better and worse
- Learning should help to bind us together
- To survive and thrive, the world needs us to learn

The Inquiry does not find that the present UK system of lifelong learning measures up to this vision and these values. In its recommendations it seeks to set out a system that could recognisably evolve from the current one, but which would be significantly different. It argues for the art of the possible - incremental and radical, but not revolutionary, change.

The recommendations

In effect, the Inquiry confines its analysis to adult learning from 18 years upwards. It makes ten recommendations:

1. Base lifelong learning policy in the UK on a new life-course model with four key stages (up to 25 years; 25 – 50 years; 50 – 75 years; over 75 years)
2. Rebalance resources fairly and sensibly across these different life stages
3. Build a set of learning entitlements
4. Engineer flexibility through a system of credit and encouraging part-time students
5. Improve the quality of work
6. Construct a framework for citizens’ capabilities
7. Broaden and strengthen the capacity of the lifelong learning workforce
8. Revive local responsibility
9. Create coherent national frameworks
10. Make the system intelligent

All of these ten recommendations have implications for learning in later life but this article focuses on the first two, which are arguably pivotal.

A new four stage model of lifelong learning

The central analytical thrust of Learning Through Life is for a fresh look at the way we view the lifecourse as a whole and, therefore, the way learning opportunities are distributed across it. The basic proposal is a very simple one: to think of the life course in terms of four main stages, broadly up to 24 years, 25–49, 50–74 and 75+.

There are three powerful motors which provide the rationale for this realignment: demographic, economic and social. An ageing society and extended transitions into and out of employment combine to suggest the jettisoning of arbitrary dividing lines such as 60/65 for a retirement age.

Patterns of working lives in the UK, the Inquiry’s report urges, are in turbulent flux (ONS 2008). At the same time, demographic change and the ageing of the population are resculpting the shape of society, slowly but massively (McNair 2009). The combination of these two forces for change means that there will rarely be a better time than the present for fresh thinking about a more sensible, fairer and better spread of paid and unpaid work and learning time across the life course. So the report presents a re-conceptualised model. To adopt it implies major revision: to attitudes and mindsets; to policies and practice; and to approaches to fairness and opportunity.

The essential counterpart to the four-stage model is that there should be a new contract between the generations. The ‘contract’ – a matter of social attitude rather than law – is based on the mutual advantages which flow if all generations have access to learning. The four-stage approach opens up prospects for a better balance in the distribution of resources and opportunities. It applies to learning in, at and for work, as well as for personal and community development. It particularly means innovation to meet the needs of the Third and Fourth Ages and recognising the way learning in one generation generates value for all. At the same time, it allows for a strong emphasis on mixed-age, family and intergenerational learning. The four-stage structure in no way suggests that education and training should be age-segregated. A new intergenerational contract means more opportunities for people to contribute economically; to stay connected; and to achieve meaning in their extended lives.
Thus, in the four-stage model:

a) The first age (18–24) should be looked at as a whole – a very diverse group, but a group nevertheless, with all of its members having claims to learning and development as young people. This is a fundamental change of perspective from the current UK approach, which constantly divides and redivides young people.

b) In the second stage (25–50), society puts great and competing pressures on people, particularly women: child-rearing, family life, employment, job-related training, career advancement and, in some cases care for elders. Learning in the second stage should be seen not only as a key measure for sustaining productivity, prosperity and strong family lives, but as part of a new mosaic of time, exhibiting different mixes of paid and unpaid work and learning time. Ironically, the current unemployment crisis opens up scope for the UK to move away from this second stage time squeeze, in which career and family responsibilities may combine together to reduce well-being.

c) The third stage (50–75) then occupies centre stage (and, indeed, there is already the terminology of the “Third Age” accepted world-wide). It is the age group which will grow more than any others in the next 10 years. More people need and want to work longer and consequently to carry on learning at work. Training and education opportunities can be greatly enhanced for those over 50. Policy, including learning policy, should treat 75 as the normal upper age limit for economic activity, replacing the outmoded 60/65. This will unblock a better general distribution of working time across the life course. It will not be not a call for everyone to work to 75, but a recognition that ‘retirement’ will increasingly become a gradual process lasting several years. The need is for diverse learning opportunities which will meet both their professional and their personal needs.

d) In the fourth stage of life (75 years and over) the implications of the increasing numbers in this age bracket for the content of lifelong learning should be explored systematically and creatively (these two not being in opposition). In particular, the emergence of the Fourth Age means that there is an urgent need to develop an authentic curriculum offer in later life. It embraces pragmatic issues to do with the management of health and issues to do with the meaningfulness of life as death approaches.

25, 50 and 75 years should be identified and used as key transition points, though of course not as universal precise moments. People do not make the transition at the same age or in the same way, but focusing on these points gives a useful structure for personal development and for policy. Special information and guidance arrangements should be in place for those making the transitions to enable them – if they so wish – to review what part learning might play in their lives.
Rebalancing resources across the different life stages

Most people in the UK already spend more than a third of their adult lives in retirement, and the number of people over 65 will accelerate rapidly in the next two decades. Over recent years, a series of UK initiatives on the implications of ageing - the Opportunity Age strategy (DWP 2005), a Foresight exercise on ageing (Kirkwood et al. 2009), and the Age Positive (DWP 2009) and Better Government for Older People initiatives (Cabinet Office 2000) - have paid little attention to learning, while educational responses have been slow to come from a system primarily focused on young people and on paid employment. The explicit recognition of this issue by the UK Government, in its 2009 Learning Revolution White Paper on informal adult learning (DIUS 2009) and its new Age strategy (HM Government 2009) are welcome, but modest in proportion to the scale of the challenge.

There are major omissions in public policy relating to learning in later life such as:

- diminishing rather than growing public opportunities for learning by older people
- training at work reduces very sharply for those over 55 years
- the emphasis on economic purposes in our education and training system ignores the growing need for learning for life beyond work
- the positive value of intergenerational and family learning is insufficiently recognised
- failure to join up government initiatives like the various planned services to provide careers advice and health checks for older people

Remedying these omissions, for the most part, will require additional resource as well as changed perceptions and attitudes. Remedies can be scheduled over many years – but they do need to be set in train with a positive and visible impetus behind them. In the UK a classic precedent is the reform of the pensions system, which includes the gradual raising of the pension age. Something similar is needed for learning in later life: a gradual but persistent adjustment of the system to reflect the changing demographic balance.

The Inquiry has assembled for the first time an overall picture of the way public, employer and private resources are spent on all forms of learning. It estimates the annual current total in the UK to be at around £55 billion, excluding opportunity costs in terms of time. The Inquiry examined the trends of participation in education and training at different ages, and across different social categories, and combined these with estimates of how long people spend in learning. This enabled it to demonstrate the gross imbalances in resource distribution across the life course. It calculated that per capita expenditure on formal and informal learning is around £8,045 for those in the first stage (18–24), £283 for those in the second, £86 for those in the third, and £60 for those in the fourth. Any independent observer would have to say that this is a strange way of matching resource to need, given the current and (even more striking) the future shape of the population, as well as the pace of change in knowledge and technology.
The same analysis shows how unfairly opportunity is distributed across social groups, as advantage and disadvantage accumulate over time. This applies inside and outside the workplace. Age is not the only or even the dominant factor shaping this, but a life course approach enables us to get a grasp on many of the other key factors which determine people’s access to learning.

This is the foundation of a case for a different balance. It is not recommending age segregation. To the contrary: the Inquiry argues for much stronger awareness of the benefits of learning across age boundaries. It also urges a more conscious approach to solidarity between the generations. This means recognition of how different generations contribute through public and private transfers, and the support of these to make the most of mutually beneficial investments in learning. All generations benefit from each other’s learning, and could do so more. Financial resources are only part of the picture, but understanding them is an essential condition for moving to a system which better represents the vision of learning throughout life and gives body to the values which underlie it.

In summary, then, the main Inquiry report therefore recommends:

a) Public agreement on the criteria for fair and effective allocation of resources for learning across the life course. The debate should include both efficiency and equity: what do we need to do to make sure that resources have maximum impact and how are they to be used to include all segments of society? Current policy discussions are still rooted in investment in education as an initial phase. They should be framed around the interdependence of generations, so that investment in learning for all ages benefits all other ages.

b) As a starting point, the very broad goal of shifting from the current 86: 11: 2.5: 0.5 allocation across the four quarters, to approximately 80: 15: 4: 1 by 2020 (as Table I shows) is proposed. If total expenditure remained the same this would mean an increase in investment in learning in the second stage from around £6.1 billion to £8.2 billion; in the third stage from around £1.4 billion to £2.2 billion; and in the fourth stage from a broad estimate of £285 million to around £550 million. Despite population increases within stages 2 – 4, the expenditure per head in each stage on learning would increase significantly. The adjustment should be seen not so much as a specific target as a collective aspiration for a fairer spread.
Table I: Expenditure on formal and informal learning across the four life stages

<table>
<thead>
<tr>
<th></th>
<th>18-24</th>
<th>25-49</th>
<th>50-74</th>
<th>75+</th>
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</thead>
<tbody>
<tr>
<td>2008 total population (millions)</td>
<td>5.86</td>
<td>21.44</td>
<td>16.24</td>
<td>4.77</td>
</tr>
<tr>
<td>2008 total expenditure £ millions</td>
<td>£47,141</td>
<td>£6,057</td>
<td>£1,357</td>
<td>£285</td>
</tr>
<tr>
<td>2008 percentage of total expenditure</td>
<td>86%</td>
<td>11%</td>
<td>2.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td>2008 expenditure per head of population</td>
<td>£8,045</td>
<td>£283</td>
<td>£86</td>
<td>£60</td>
</tr>
<tr>
<td>2020 projected total population (millions)</td>
<td>5.36</td>
<td>22.05</td>
<td>19.24</td>
<td>6.12</td>
</tr>
<tr>
<td>2020 proposed total expenditure £ millions</td>
<td>£43,904</td>
<td>£8,232</td>
<td>£2,195</td>
<td>£549</td>
</tr>
<tr>
<td>2020 proposed percentage of total expenditure</td>
<td>80%</td>
<td>15%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>2020 proposed expenditure per head of population</td>
<td>£8,191</td>
<td>£373</td>
<td>£114</td>
<td>£90</td>
</tr>
</tbody>
</table>

c) To counter any sense that it favours age segregation, the Inquiry recommends redoubling efforts in support of family and intergenerational learning. Investing in families, broadly understood, is an absolute win-win strategy, and an outstanding way of breaking the cycle of disadvantage.

The implications for learning in later life

What, then, are the implications of the Inquiry’s recommendations for learning in later life in the UK? Clearly there would be over a ten year period a modest but important redistribution of resources to the support of learning in the Third and Fourth ages. This distribution of resources would be as of right; it would both create and follow a public re-balancing of esteem for learning in later life. A crucial underpinning of the Inquiry report is that the third and fourth stages of life would become equal in significance in the public mind to the first two stages and it would be accepted that development of the individual is required throughout all four.
From the perspective of the Inquiry, learning opportunities are essential to the Third Age. They are the necessary lubricant to keep a dynamo of opportunity and activity in the lives of those over 50s functioning effectively. There would be no fixed date of exit from work; no embargo on older people receiving on-the-job training; no requirement that retirement would be sudden and sharp; no assumption that retired people should stay retired rather than retraining and moving to other kinds and modes of work, whether paid or unpaid. Equally those over 50 could eschew work but continue to learn as is appropriate to the kind of person they are and wish to be. They may combine traditional family roles with new responsibilities as grandparents and carers. They may be the prime beneficiaries of the citizens’ curriculum which is an important element of the Inquiry’s main report. The citizens’ curriculum is built around a set of four capabilities: digital, health, financial and civic (in addition to capabilities associated with employability) for which there should be a minimum threshold of provision in each part of the land.

As for the Fourth Age, the Inquiry notes that, however it is qualified, identifying the age of 75 years and over as a separate stage of life is perhaps the most controversial aspect of its presentation of the four stages model. The argument against is that it stigmatises people who do not wish to be thought of as ‘in the final stage’ or ‘very old’. Nevertheless, the fact that life expectancy is now lengthened to a historically unprecedented extent is generating new learning needs. The increasing size of the Fourth Age group poses specific challenges to the goals and meaning of lifelong learning policy and practice and this is why the Inquiry refers to the need for the development of what it called ‘an authentic curriculum offer in later life.’

In many respects, the learning needs of older people in the fourth stage overlap with those of preceding ages, although their vocational learning needs will largely have disappeared. However, there are at least two distinct sets of learning challenges which are inherently more specific to this stage than others. Both are integrally linked to the notion of individual empowerment and choice. The first set derives from the notion of a citizens’ curriculum. The focus here is likely to be on health. Older people should be able to continue to learn how to manage their own physical and mental health as far as possible. This includes managing their relations with the providers of health and other services and financial capability is also likely to be a factor. The second set is existential. Those in the final stage of life may feel the need to come to terms with it. That process raises questions about meaning and purpose in which learning has a role. There can be few more important learning tasks than learning to make sense of the life you have lived.

The Inquiry in perspective

It is important to re-emphasise that a model is just that and no more. It is a way of representing an idea or process; it is a means of explanation, a way of trying to get a little closer to the truth, a simplification of reality. Thus, the four stage model of the life-course which constitutes such an important part of the Inquiry report is no more than what it claims to be, a way of unpacking a complex set of social
changes and proposed strategies. The Inquiry does not claim that resource flows and learning needs are discrete to stages of the life course model. It says the opposite. It underlines the importance of strategies to deal with key transitions at the nodal points of the model – 25, 50 and 75 years. It reiterates regularly that the four-stage model does not imply stronger age segregation in the future; it advocates particularly learning which explicitly seeks to span generations. An ageing society does not only mean that there are more older people. It also means changes in the shape of families: both longer with more generations and thinner with fewer children per adult, with more dissolved relationships and reconstituted families. This makes for a complex structure.

Indeed, the report argues that investment in learning in one life stage will benefit all stages. Thus grandparents can teach what they learn to grandchildren or gain the confidence to learn with them. Grandchildren can learn how to enrich the lives of grandparents. All generations, and the communities of which they are a part, could experience a new and more sustainable solidarity.

The NIACE Inquiry is about the kind of learning society that it believes is both possible and desirable in the United Kingdom. Recognising both the ageing of society and the changing nature of work as key drivers, it postulates an analysis that, among many other outcomes, would make a profound difference to learning in later life for UK citizens. We have yet to learn what influence it will have on the policy and thinking of current and future UK governments and on other agencies. However that may be, it seems probable that – with necessary adjustments - the Inquiry’s analysis will be relevant to debates in other European states and in many other countries worldwide.

References


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**Key words**