

Workplace Literacy

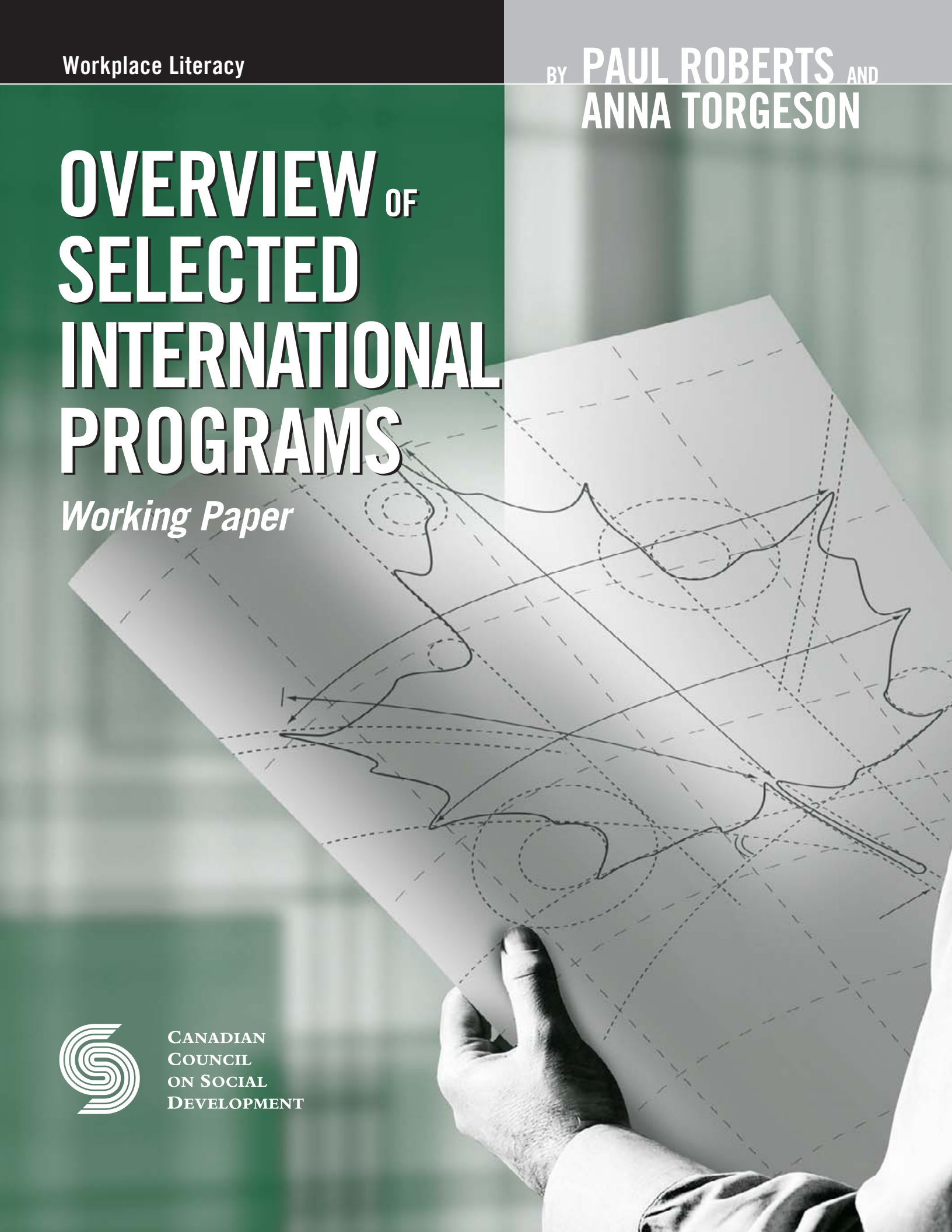
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OVERVIEW OF SELECTED INTERNATIONAL PROGRAMS

Working Paper



CANADIAN
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Workplace Literacy:

Overview of Selected International Programs

Working Paper

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Foreword

In Canada and internationally, there has been increased attention paid to adult literacy in the workplace since the release of two surveys done between 1994 and 2003. However, workplace literacy in Canada is still a largely invisible issue, both for the public and politicians. There is no national strategy. Few provinces and territories have education and training strategies that include workplace literacy as a component – and those that do have significantly varied approaches.

The Canadian Council on Social Development’s project, “Literacy Programs in the Workplace: How to Increase Employer Support” examined what might be done to strengthen the infrastructure of literacy programs in Canada, specifically in the area of workplace literacy. The project, launched in 2004, sought to identify the types of approaches to workplace literacy training – internationally and across Canada – that have proven to be effective in engaging employers in workplace literacy initiatives.

Research for the project proceeded in four phases: an extensive literature review; a survey of the international program and policy literature; a review of Canadian policies and programs at the provincial level; and three detailed provincial case studies including interviews with employers. Our interviews with select employers in Canada indicated areas where the employers agree about the types of approaches, incentives, and programs that work best in a range of employment environments.

Findings from this project are presented in a series of Working Papers, a Final Report that includes an analysis of the case studies and the findings from employer interviews, and an Executive Summary.

Reports from the Workplace Literacy Project include the following:

- **Overview of Selected International Programs: Working Paper**, by Paul Roberts and Anna Torgeson, looks at the conditions for adult education and training, including workplace literacy, in eight OECD countries;
- **Overview of Provincial and Territorial Policies: Working Paper**, by Emily Watkins, provides an overview of current adult education and workplace literacy policies and programs across Canada;
- **Canadian Literature Review and Bibliography: Working Paper**, by Paul Roberts and Rebecca Gowan, looks at various perspectives and approaches to workplace literacy by different stakeholders. It also examines research on the benefits of workplace literacy programs for employers and workers;
- **Programs in the Workplace: How to Increase Employer Support**, by Lynette Plett. This report draws together the findings of the working papers and discusses the lessons learned from Canada and elsewhere regarding successful employer involvement in workplace literacy programs. It also includes an analysis of three provincial case studies of workplace literacy programs and interviews with employers in those provinces;
- **Programs in the Workplace: Executive Summary**; and,
- **Programmes en milieu de travail : Sommaire.**

All of the Workplace Literacy reports are available free of charge on the CCSD's website at www.ccsd.ca/pubs/2007/literacy/.

The bulk of research for this project looked at workplace literacy practices between 2004 and 2006. However, much has changed in the international and Canadian contexts since that time. For example, in 2006, the federal government created the Adult Learning, Literacy and Essential Skills Program (ALLESF) which integrated the National Literacy Program, the Office of Learning Technologies, and the Learning Initiatives Program, then subsequently announced spending cuts totalling \$17.7 million to literacy programming across the country. It is beyond the scope of our current study to explore the implications of these more recent changes in government policies and programs.

As we look forward, evidence from these reports suggest that employers have an important role to play in building a literacy program infrastructure that responds to local needs. But employers aren't interested in playing this role on their own. They view workplace literacy programming as a partnership endeavour, one that demands leadership and resources from different levels of government. We hope that the findings from this project will support collective efforts to advance the provision of literacy and lifelong learning opportunities for all Canadians.

Introduction

This paper explores the issue of workplace literacy in an international context. It provides a brief overview of recent initiatives in each of the jurisdictions and outlines the policy conditions that affect the provision of workplace literacy in each country. There tends to be a generalized recognition of the importance of workplace literacy for providing workers with clear benefits – both economic and more broadly social. However, in some jurisdictions, employers are less inclined to recognize the importance of workplace literacy, both for themselves and their workers. Each of the jurisdictions approaches the issue with a number of policy initiatives to encourage employers to invest in literacy and adult education programs. Some similarities are observed across jurisdictions in terms of the debates regarding general ideological differences about workplace literacy – human capital versus social practice – and results from the 1995 International Adult Literacy Survey (IALS) prompted action on the part of many governments. As we will see, however, these actions were not always of the same nature.

Since the appearance of international surveys on literacy such as the IALS, there has been increased attention paid to the provision of adult education. This is evident in the focus of supranational bodies such as the Organisation for Economic Co-operation and Development (OECD) and the European Union (EU), as well as among their member countries. Indeed, the OECD has published two comparative reports based on an extensive “thematic review” of the approaches used to adult education in 17 OECD countries between 1999 and 2004. These reports (2003, 2005) draw on information gathered in the thematic review.¹ For each country, the review included an initial background report that was produced by the country, as well as a follow-up report – a “country note” – based on an OECD team visit to the country. The European Union has also given increased attention to adult education. For instance, a European Social Fund (ESF), through the European Commission, co-funds adult learning in member countries (OECD, 2005: 58-59).

Despite different conceptualizations of adult learning across countries, the OECD report, entitled *Promoting Adult Learning* (2005), includes a wide range of activities in its definition of adult learning. These activities involve:

both formal and informal learning, work-related education and training for the employed, language and citizenship courses for immigrants, labour market training programmes for job seekers, and learning for personal development (OECD, 2005).

The report pays a great deal of attention to the role of firms in the funding of workplace literacy programs, emphasizing the importance of government-sponsored incentive systems to encourage employers to provide such education and training, particularly for small and medium enterprises (SMEs) and for low-skilled workers (OECD, 2005: 56).

¹ The thematic review consisted of two rounds. The first OECD comparative report, *Beyond Rhetoric: Adult Learning Policies and Practices* (2003), analyzed the first round of the thematic review, which included Canada, Denmark, Finland, Norway, Portugal, Spain, Sweden, Switzerland and the United Kingdom. The second OECD report, *Promoting Adult Learning* (2005), analyzed the second round of the thematic review, which included Austria, Hungary, Mexico, Poland, Germany, Korea, the Netherlands, the United Kingdom, and the United States.

This paper examines the policies of a select number of OECD countries, including Australia, New Zealand, the United Kingdom, and the United States. Subsequent sections offer information on additional countries including Ireland, France, Germany, Sweden, and Denmark.² The aim is to provide information on the general approach to workplace literacy used in each country and in some cases, to adult education.³ The paper also examines how countries balance the public and private provision of workplace literacy, training and adult education, particularly programs and policies that offer incentives for the participation of firms.

In Canada's federal system, funding for adult education is given to the provinces which, in turn, decide on particular programs. McKenna and Fitzpatrick argue that "the Canadian approach is the most laissez-faire" with "no federally endorsed approach" (SD, 19). Understanding how other countries provide funding for workplace training programs and incentives for firms could be useful in developing programs in Canada.

Workplace Literacy in Australia

Literacy and numeracy skill development in Australia is affected by the same debate as have been seen in Canada – namely, the debate between a human capital or individual skills perspective and a social practice viewpoint. In Australia, this is referred to as the debate between a "functional-economic discourse" and a "social practice discourse" (Watson et al., 2001: 1). This matter can affect the approach and manner in which particular aspects of literacy and numeracy policy are developed. In Australia, changes in the way literacy and numeracy are approached has much to do with changes affecting the global economy and the needs of the domestic labour market to provide its workforce with the necessary job skills.

The necessity of providing literacy and numeracy components in vocational training was recognized in Australia as far back as 1974 (Wilson et al., 2001). Starting in the 1980s and early 1990s, a concerted effort was made to focus on literacy and numeracy plans within the broader training and skill requirement initiatives. Beginning in the early 1990s, literacy training was brought under the auspices of vocational training, which was further recognized by the integration of literacy competencies under national industry training standards in 1993. By the late 1990s, growth in the provision of literacy and language training led to the introduction of a reporting system to measure the performance of the standards and training objectives in an understandable and comparable manner (Wilson et al., 2001).

Further changes to the training and policy context followed the release of results from the IALS. While concerns about literacy in the Australian population are not new, particularly for the working population, results from the IALS showed that there were large segments of the population – particularly select age, educational and ethnic groups – that had disproportionately lower levels of literacy, as measured by the IALS literacy scales (Shore, 2003). Australia, like Canada, had a relatively high prose ranking, but performed better on prose than on quantitative

² France and Ireland were not part of the thematic review, so there is less OECD information available on these two countries.

³ Taking into account that different concepts are used in the various countries, the terms workplace literacy, workplace education, workplace learning, workplace training, and workplace basic education will be used as appropriate to particular contexts.

literacy outcomes (Shore, 2003: 4). In the aftermath of the IALS data, continuing changes to the training requirements in Australia have included literacy and numeracy as key aspects.

Workplace training and skill development in Australia faces many challenges similar in nature to those found in Canada. Most obvious is the fact that, like Canada, Australia is a federation of states and territories, with each of these smaller jurisdictions having authority over a number of political and social issues. As a result, vocational and technical training (which can encompass workplace literacy training programs) is affected by the eight levels of state and territory authority and the federal government:

The last of these contextual factors [a federal political system] is particularly important for technical and vocational education and training (TVET). Publicly funded TVET is the direct responsibility of the eight state and territory (provincial) governments, with the federal government also now playing an important funding and policy role following the establishment of the Australian National Training Authority in the early 1990s. (Karmel, 2004)

Australian state, territorial and federal ministers have reached agreement on the various strategies and objectives for vocational and work training (Karmel, 2004). The provision of vocational training and education of workers, the type of training required and the manner in which it will be applied by training organizations are all governed by the Australian Quality Training Framework or AQTF (Australian National Training Authority, 2002). A requirement of standards under the AQTF is that a training organization is specifically required to include a component that addresses language, literacy and numeracy skills (Australian National Training Authority, 2002). The exact means by which this is achieved is not stipulated under the framework, but the standards for training components are set by the relevant state or territory (Australian National Training Authority, 2002). Federal funding for workplace literacy components of overall vocational educational training exists through two programs: Language Literacy and Numeracy Program (LLNP) and the Workplace English Language and Literacy (WELL) program.

The Australian approach to the provision of adult education involves a strong vocational education system and investment in workplace literacy programs. However, there were major cuts to national funding of adult literacy in 1996, following the “literacy decade” of 1987 to 1996 (McKenna and Fitzpatrick, SD, 68; and May, 2004). As a federation, Australian states and territories have a large degree of authority regarding workplace literacy. For instance, the Vocational Education and Training (VET) sector is coordinated by the state and territorial governments, as well as the federal government, through the Australian National Training Authority (ANTA), which was created in 1993 (McKenna and Fitzpatrick, 17; CCSD, 22). According to McKenna and Fitzpatrick, “Australia has a population of over 19 million with about 12% of the adult population engaged in vocational education and training” (May, 2004: 2). In addition to coordinating the VET sector, ANTA also sponsors the Australian Qualifications Framework and Australian Quality Training Framework. These systems set standards for the provision of adult literacy through accredited courses. For instance, one-year “intensive apprenticeships,” which combine school learning with job learning, lead to standard qualifications under such frameworks (OECD, 2005: 77).

One effect of these new initiatives has been to blur the line between specialists in traditional vocational education training and literacy and numeracy specialists (Wilson et al., 2001). These two fields were traditionally kept separate but the blurring of the roles, particularly in the case of workplace training, has led to some confusion. The confusion stems from the fact that many vocational trainers are likely to see literacy and numeracy training from within a “functional-economic discourse,” while many literacy specialists are more likely to view it from a “social practice discourse” (Wilson et al., 2001).

While the context of literacy and workplace training in Australia has improved, there are some areas that research has identified as needing further change. For example, the need to move away from “training packages” as a concept has been suggested, since literacy and numeracy encompass a wider field (ALNARC, 2000). As well, there is a need to make literacy and numeracy more visible within the existing training requirements. Too often, Australian researchers found that workplace literacy and numeracy were overshadowed or even lost in the training schemes, despite the need to include such components (ALNARC, 2000). Further recommendations include better teaching and service provision, and the need for a learning culture to gain greater employer acceptance of the long-term benefits of such programs, rather than seeking shorter-term goals. Challenges remain for government and literacy practitioners to obtain a greater understanding of the benefits of such programs for small employers in particular.

Despite a lack of centralized planning for adult education, McKenna and Fitzpatrick indicate that “other countries have noted Australia’s success in the provision of workplace literacy and integration of literacy into vocational training” (29-30). Apart from its role in providing VET, for instance, the federal government – through the Department of Education, Science and Training – provides funding for adult literacy programs, including funding to workplaces (McKenna and Fitzpatrick, 17 and WELL). The federal government offers such funding through two national programs, the Workplace English Language and Literacy Program (WELL) and the Language, Literacy and Numeracy Programme (LLNP).

WELL seeks “to provide workers with English language, literacy and numeracy skills” (WELL, 2). The program is co-funded by the government and requires an employer contribution (McKenna and Fitzpatrick; SD, 27). The WELL program funds about 300 projects involving 18,000 workers per year (McKenna and Fitzpatrick, SD, 73). Whereas WELL provides training in workplace literacy, the LLNP is a program that provides language, adult literacy, and numeracy training for “job-seekers” through 54 registered training organizations (73).

These government-funded national programs – WELL and LLNP – have achieved the desired effects. According to Johnston, a survey of 30 workplace training programs found benefits to firms such as increased productivity and cost savings (28). The WELL program has had results for firms and employees, such as “better workplace skills, more effective communication skills, increased involvement in training and skill development programmes, improved occupational health and safety, and increased productivity” (WELL).

In addition to providing co-financing for workplace literacy programs, the Australian government also provides financial incentives for firms to offer training through profit tax deductions. According to the OECD (2005), profit tax deductions enable firms to deduct the

costs of training, but do not tend to benefit small and medium enterprises (SMEs). Nonetheless, profit tax deductions can be designed to provide greater incentives for SMEs and to target low-skilled workers. In Australia, for instance, in order to encourage training for low-skilled workers, profit tax deductions apply only to non-wage training (OECD, 2005: 61).

Workplace Literacy in New Zealand

The importance of literacy training and the provision of literacy programs has gained increasing recognition in New Zealand over the last 10 years. As in Canada and Australia, a number of literacy organizations and providers have been working in the literacy field in New Zealand since the 1970s (Johnson, 2000; Moore and Benseman, 2000). However, as was the case in Australia, it was the release of statistics from the International Adult Literacy Survey (IALS) in 1996 that prompted a concerted effort by the NZ government to focus on the issue of literacy and particularly, on workplace literacy among its population (Ministry of Education, 2001; Johnson, 2000).

Results from IALS showed that a large proportion of the New Zealand population – particularly working-age persons and those from particular ethnic groups, including the Maori – had among the lowest literacy capacity in each of the three major domains tested (Ministry of Education, 2001; Johnson, 2000). As well, the international comparison of the IALS results showed that New Zealand fared relatively worse than other advanced industrialized countries (such as Sweden and the Netherlands) and had relatively larger proportions of its population in the lower literacy levels (Ministry of Education, 2001). These results and information from independent studies by literacy experts in the country have prompted a greater focus on this issue in government circles (Johnson, 2000; Moore and Benseman, 2000).

New Zealand's increased attention to adult literacy is evident in its establishment of a Tertiary Education Commission in 2002. The Commission allocates \$12 million (NZ) for adult literacy and English-language programs for speakers of other languages (McKenna and Fitzpatrick, May 2004: 1). Through the Commission, the government funds a wide range of different program providers, including employers and industry training organizations, through Workplace Literacy Funds (McKenna and Fitzpatrick, 21 and SD, 27). According to McKenna and Fitzpatrick, the Tertiary Education Commission has the responsibility for funding all post-compulsory education provision by universities, polytechnics, colleges of education, private trainers, foundation education agencies, industry training organizations, and adult and community education providers (16).

Literacy training and provision in New Zealand is similar in some ways to the situation in Canada, but there are also very significant differences. As in Canada, there are a number of organizations in New Zealand that can be characterized as advancing a human capital and individual skills perspective, as well as many which support a social practice view (Johnson, 2000). Government publications in New Zealand (see Ministry of Education, 2001, and Skill New Zealand, 2002) emphasize the importance of literacy as a skill for increasing the human capital of the workforce, and by extension, affecting the economic well-being of the country and preparing it for the "knowledge-based economy." However, the government also recognizes the

importance of emphasizing a more social and family-oriented aspect to literacy provision (Ministry of Education, 2001: 3).

Following the release of the IALS results, the New Zealand government began an ambitious expansion of literacy-related policy development. This is seen in the implementation of an adult literacy strategy by the Ministry of Education (Ministry of Education, 2001). The strategy has as its broad goal that, in the long term, New Zealanders will enjoy literacy levels that will allow full participation in life (including work, family and community), in both English and Te Reo Maori (Ministry of Education, 2001: 3). Four key principles affect the strategy: learners will make gains as quickly as possible; learners' needs will be met by programmes suitable in content and pace; programme development will be guided by evaluation and research; and, there will be programmes for a wide range of learners.

To achieve the broad aims of the strategy, the Ministry identified three key elements. The first was to develop the capability to ensure that quality learning is provided using highly skilled providers and high-quality resources. Secondly, quality systems for assessing programmes would be improved to ensure that the programmes are world class. Lastly, an increased provision of opportunities for adult literacy training in the workplace, community and tertiary institutions must be achieved.

Previous policy changes in New Zealand affected the context in which the literacy strategy was launched. Changes to the educational and credential system in the 1990s led to the development of a nationally recognized skill and educational qualification and credential system. This means that participants in literacy programmes can now have this skill recognized at a broader level of skill qualifications by all NZ employers. As a result, any such learning is transportable, transferable and can be recognized – literacy training will not be seen as simply “wasted” or related only to a particular job.

Another important aspect of the training environment in New Zealand was the introduction of a national industry training strategy, in concert with the qualifications system. This system was instituted

as part of an effort to give New Zealand industry, which is comprised mostly of small businesses, a competitive edge by enhancing the overall skill level of the workforce. It created incentives for employers to invest in training, primarily through government contribution to the costs of the development and delivery of both on- and off-job training. The major incentive for employers was a new training subsidy, the Industry Training Fund (ITF), administered by Skill New Zealand. (Johnson, 2000: 15)

The act which created the training funds also instituted industry-wide training organizations (ITOs), through which funds from industry and from the ITF could be used to provide training to workers. The ITOs do not provide the training themselves, but rather contract it out to either tertiary educational institutes or private training facilities.

A further aspect of the literacy strategy is the presence of Workbase, a dedicated workplace literacy organization to provide training, funding, and expertise in the area (Moore and

Benseman, 2000; Johnson, 2000). Originally started as a project by the Adult Reading and Learning Assistance Federation in 1992, Workbase is now a non-governmental organization that provides a one-stop expert resource on workplace literacy for government and the public, including private sector businesses. It takes a leadership role in promoting the issue of workplace literacy by networking and hosting conferences, and also undertakes research and assessments for private businesses of their workplace literacy needs.

Research conducted by Workbase includes information pertaining to workers' responses to literacy programs, management voices, information for unions, and guides for small businesses and ITOs that may be interested in starting a literacy program. In 2003, Workbase became the New Zealand Centre for Workforce Literacy. It is the leading supporter of workplace literacy by providing workplace solutions, conducting research to inform policy, offering teaching resources and curriculum for providers, and granting funding through the Workplace Basic Skills Development Fund (McKenna and Fitzpatrick, SD, 27). For instance, Johnston refers to Workbase's findings on the effects of workplace training in four case studies. Among the benefits of workplace training programs, "firms report a number of benefits including a decrease in error rates, improved levels of participation in team meetings, growth in employees' confidence, and an improved ability to work more flexibly" (28).

Changes in the funding and government policies towards workplace literacy have had some effect. A review of the Skill New Zealand literacy fund in the first year showed that funds were accessed to provide training for workers in a variety of industries, many from those groups with the lowest levels of literacy (Skill New Zealand, 2002). The findings also suggested that the training provided some success both for the learners and the firms. However, the industries and private-sector firms were attracted to provide training when there was a joint funding approach between government and private firms or organizations (Skill New Zealand, 2002). It seems likely that in the absence of such joint funds, ITOs in New Zealand would not provide the training. This is due, in part, to the fact that ITOs did not feel that the delivery of workplace training was part of their core business, and they stated that workplace literacy training was not recognized as a priority when attempting to access training funds available through the ITFs.

Overall, workplace literacy training in New Zealand seems to have governmental support, both in terms of policy and monetarily. The system of provision through ITOs and organizations such as Workbase suggests the need to involve non-governmental literacy organizations and industry representatives in addressing this issue. Having a strategy that emphasizes particular principles and continuing to provide funds to support training will be crucial as New Zealand pursues improvements to literacy levels in the population. As in the Canadian context, however, obtaining general support from NZ employers remains difficult. Many employers say they are unaware of workplace literacy initiatives, or they are unwilling to provide such programs because they do not perceive the need (Workbase, 2005).

Workplace Literacy in the United Kingdom

The provision of workplace literacy and numeracy in the United Kingdom has been affected by similar social and economic trends to those identified in New Zealand and Australia. However, much of the debate in the UK is not set within a context of workplace literacy but rather is

discussed within the broader context of “Basic Skills.” This difference can, at times, be a source of some confusion.

According to the OECD, the UK is among the highest in international ranking for country participation rates in adult learning (2005, 22). In terms of this high participation, McKenna and Fitzpatrick found that “the United Kingdom has the most comprehensive system and learning infrastructure for adult literacy of any of the countries reviewed” for the report (May 2004: 2). The UK’s wide-ranging commitment to adult education – through a basic skills approach – is evident in its institutions, policies, and pilot projects.

The UK has two adult literacy agencies through the Department for Education: The Learning and Skills Development Agency (for education after age 16) and the Adult Basic Skills Strategy Unit to manage the national strategy with nine regional coordinators. A policy on adult education – the *Skills Strategy* (2003) – incorporates earlier policies such as *Skills for Life* (established in 2001 and extended to 2007) and assures the provision of free Level 2 qualification training for “economically active adults” who did not complete upper secondary education (OECD, June 2005: 11). The OECD suggests that the UK is on track for meeting its goals set in *Skills for Life*:

The target to help 1.5 million adults achieve Level 2 national certificates by 2007 is progressing effectively: the government is on schedule to meet its interim target of helping 750,000 low-skilled adults achieve a national qualification by 2004 (June 2004: 30).

The *Skills Strategy* involves partnerships between government agencies and departments,⁴ as well as partnerships with unions and employers (OECD, June 2004: 28).

As was seen in both New Zealand and Australia, literacy activities in the UK (within a basic skill context) have formed an important part of workplace training (Frank, 2003a). The importance of basic skill development has been acknowledged by governmental departments and through government funding and new initiatives. As in New Zealand and Australia, many changes for improvement began in the early 1990s in the UK using existing organizations and networks, as well as following government changes.

An example of these changes can be seen in the establishment of the Workplace Basic Skills Network. This organization, set up in 1993, provides further education to basic skills teachers, advice and consultancy to organizations, produces policy reports, and performs research on workplace basic skills including workplace literacy (Frank, 2003a). The network receives funding from the Department for Education and Skills to provide funding to basic skills programs (see Frank, 2003b). However, establishment of the network was, to some degree, a response to prevailing opinions regarding the effects and costs of lower literacy on the economy. Fiona Frank maintains that the network was the result of research that countered opinions blaming workers for their lower skill levels (2003b).

⁴ The Department of Work and Pensions, Department for Education and Skills, Department of Trade and Industry, and Department of Treasury.

The ability to map or otherwise summarize the diverse range of programs and projects available in the UK is an almost impossible task. This became obvious to Ananiadou et al. (2004: 12) when they attempted to identify effective workplace basic skill strategies:

It became clear to us that no one individual or organization was in a position to provide a complete list of workplace programmes, either across the whole country or within a particular region. Even small geographical pockets of the country are hard to map as they encompass a range of localized projects, funded through a variety of routes and providers.

Those observations apply equally in each of the countries examined in this section. Ananiadou et al. instead adopted a research methodology that focused on particular occupational sectors that were likely to have higher levels of low basic skills and formed a network of research subjects in this manner.

Again, the reporting of IALS results in 1996 stirred government action. IALS data showed that over one-fifth of the UK population fell into the lowest categories on each of the three literacy dimensions (Ananiadou et al., 2003). As in New Zealand and Australia, political concern was generated by the fact that the UK did not perform well in comparison to other countries such as Sweden or the Netherlands (Ananiadou et al., 2003).

As a result of the IALS findings, the UK government commissioned a study on basic skills among those beyond the traditional schooling system. The report, *A Fresh Start* by Sir Claus Moser, points out that there are a large number of persons affected by low basic skills and that the effects of this on both the individuals and the general economy are profound (Scottish Executive, 2001). Literacy and numeracy skills were highlighted as key basic skills where improvements and changes were necessary. Interestingly, the Moser report casts these problems not only in terms of their economic impact on the country and on individuals, but also considers the broader social impacts. These include the effects on people's health, their likelihood of involvement in community activities, their chances of being homeless, and the effects on their families, since lower literacy among parents has an impact on the basic skills of their children (Scottish Executive, 2001).

The UK government's response to the Moser report included changes in funding and initiatives to aid the network of basic skill providers (Frank, 2003a). One such initiative was the establishment of the National Research and Development Centre for adult literacy and numeracy (NRDC) in 2002. Fostered by the Department for Education and Skills, the NRDC is an expert research and development consortium made up of a number of agencies and academic institutes. Funding to help other non-governmental agencies, such as The Basic Skills Agency in Wales, to participate is provided by the Department.

In this way, the UK government was able to meet the goals set out in the Skills for Life strategy that was adopted following Moser's report. Frank (2000: 2) points out that the new attention to adult literacy was a direct consequence of Moser's findings. Part of the initiative is to include a greater role for trade unions. Funding for workplace literacy training in the UK, under basic skills training, is also provided directly to employers and trade union groups (Frank, 2000), similar in that respect to the Australian context.

But how are these workplace basic skills initiatives actually funded? Ananiadou et al. (2004:15) reported that, in general, basic skills training is provided free to employers, with no direct costs – such as tutors or trainer fees – although there can be indirect costs associated with providing training to staff during work hours. A main source of funding for programs and training comes from the government through the Department for Education and Skills and from the Learning and Skills Council and Local Learning and Skills Councils. As in Australia, training providers must meet national standards, particularly in training for adult literacy and numeracy. Other funding can come from a wide range of sources, including Trade Union Councils or Regional Development Agencies (Ananiadou et al., 2004). The role of unions in providing funds for training and help in negotiating the release of workers to attend training, is similar to that found in Australia as well. Ananiadou et al. determined that, unfortunately, a single comprehensive guide which could provide employers or workers with information about all the sources of funding available for basic skills training did not exist (2004).

In the UK, funding of Employer Training Pilots (ETPs) offer incentives for employers to provide training. The ETPs demonstrate the government’s attempt to establish a model to increase workplace learning in SMEs and target low-skilled workers. The ETPs started in September 2002 and were evaluated in 2005 before a National Training Program was established in 2006 (OECD, June 2005: 12). In 2005, the 18 pilot projects helped fund and provide training, paid for time off for employees to train (about 35-70 hours), and offered wage compensation to employers. The wage compensation was structured based on the size of firms, with SMEs receiving 100% funding or more (OECD, June 2005: 12). Results to-date show that about two-thirds of participants were in SMEs, with less than 50 employees (OECD, 2005: 95).

A 2005 report on the ETPs tried to quantify first- and second-year effects of the programs and generally found that they had, to a small degree, helped encourage employers to provide training and employees to participate in the training (Abramovsky et al., 51). However, the report also indicated that a large amount of such employer-sponsored training is actually “deadweight” loss, meaning that a significant number would have provided similar training even without the ETP programs. Although the authors indicated that their estimates might be off somewhat since they covered only two years of the programs, they still suggested that only 10% to 15% of employers who participated constituted genuine achievements of the programs, while 85% to 90% constituted deadweight loss (Abramovsky et al., 52). In contrast, however, the OECD concluded that many of the employer participants had not provided such training before the ETPs (June 2005: 12).

In addition to providing incentives for businesses to offer workplace training programs, the ETPs show relatively high success in terms of completion rates and participant evaluations. According to Abramovsky et al., “the wider evaluation of the ETP has shown...that in general, participants express strong satisfaction with their training experiences” (54). About 11,000 learners gained either basic skills or Level 2 qualifications through the programs (Abramovsky et al., 53). In addition to financial incentives for firms through the ETPs, the UK also offers incentives – through Adult Learning Grants – for individuals to participate in full-time studies to achieve their Level 2 qualifications.

Greenhalgh's analysis suggests that the British government's approach tends to put the emphasis on voluntary spending by firms and workers, without much government subsidy. Through the ETPs, the UK's strategy is beginning to employ programs that offer incentives for firms to provide workplace training. Approximately 80% of the training conducted through the ETPs occurred on employers' sites (OECD, June 2004: 33). Indeed, the OECD indicated that firms provided a significantly larger proportion of funding for workplace literacy in the UK, compared to the other countries surveyed (OECD, 2003: 56).

Workplace Literacy in the United States

As we have seen in other countries, literacy and basic skills have become a major issue for much of the labour force in the United States over the last two decades (Norback, 1998). However, there are concerns that changes being made in the U.S. – to national-level programs in particular – leave the impression with some observers that workplace literacy is disappearing (Imel, 2003). Given that the National Workplace Literacy Program (NWLP), which was set up and funded as part of the 1991 National Literacy Act, no longer exists, these misgivings are not without some foundation (Imel, 2003). Imel claims, however, that the programs which replaced the NWLP still serve the workplace literacy needs of adults and have created opportunities for states to develop basic skill programs with employment goals (2003: 1).

The U.S. orientation to adult education tends to follow a school-based approach and thus does not offer much in terms of incentives for firms to provide workplace education programs. According to McKenna and Fitzpatrick, the U.S. focuses on “school education and policy-makers show no evidence of accepting new literacies or multi-literacy” (14). The programs for adult education offered through the Department of Education demonstrate the federal government's focus on adult literacy through initiatives to help attain high school equivalency as well as programs to teach English.

There are two programs for those who have not completed high school: Adult Basic Education, for those with skills equivalent to Grades 1-8; and Adult Secondary Education, for General Educational Development (GED) and high school equivalency examinations (OECD, July 2005: 11). Other programs offered through the federal government include English as a Second Language (ESL) to help people – particularly immigrants – learn English; English Literacy/Civics Education which teaches English as well as the rights and responsibility of U.S. citizens; and the External Degree Program (EDP) which offers high school diplomas by assessing students' acquired life skills (OECD, July 2005: 12).

One reason for the continuing attention to workplace literacy in the United States is that many economic commentators view this policy area as a key element in the future social and economic well-being of countries, particularly in the age of the knowledge society. The need for such programs seems obvious when 54 million Americans are believed to have limited literacy abilities (Norback, 1998). In fact, results from the IALS showed that large sections of the working-age population in the U.S. were rated as having lower literacy abilities, particularly in comparison to other countries (OECD and Statistics Canada, 1995; Johnson, 1998).

The structure for delivering workplace literacy programs at the federal level in the U.S. follows two major programs: the Workforce Investment Act of 1998 (WIA) and the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Imel, 2003). According to Imel:

... passage of the WIA created a direct link between literacy education and employment goals, whereas PRWOPA, more commonly known as the Welfare Reform Act, created opportunities for states to develop basic skills programs that focused on employment goals. (Imel, 2003: 1)

Other federal efforts include programs or assistance from the National Institute for Literacy and the Division of Adult Education and Literacy with the U.S. Department of Education. However, these initiatives are generally related to support and assistance, rather than direct funding for projects, as was the case with NWLP.

According to Imel (2003), leadership for workplace literacy in the U.S. now resides at the state level. This contrasts with efforts in Australia and the U.K., where regional and national concerns are coming together to discuss and work together on workplace literacy issues. States such as Pennsylvania and Virginia are developing and delivering workplace skills strategies. It is in this context that Jurmo (2003) refers to work-related education in the USA as being a “mixed bag.”

Most of the workplace literacy programs operate at the local level, without any federal assistance. However, new funds available through the WIA are assisting some local groups to provide workplace literacy programs (Imel, 2003). In many instances, the delivery of programs is a function of both employers and workers. American unions have also played a key role in providing workplace literacy programs to their members (Jurmo, 2003; Hensley, 1993). Programs to assist transit and garment workers in New York City were a direct result of union recognition that changes to these workplaces necessitated programs for their members. Objectives for the programs and areas of concern were identified in conjunction with the union and its membership.

As mentioned, the lack of federal funding for workplace literacy indicates that most workplace literacy programs in the U.S. are administered at the local level or through unions to help their members. In addition, a “strong voluntary sector” has helped by providing some workplace literacy programs with support from businesses and philanthropists (McKenna and Fitzpatrick, 17). For instance, many businesses include basic education as part of their training (McKenna and Fitzpatrick, SD, 37).

Although the federal government cut its funding for the National Workplace Literacy Program, from 1989 to 1996, the Department of Education funded 300 workplace literacy projects in different states, and some states still offer incentives for employers to provide workplace programs. Examples of state projects include the Massachusetts Basic Education and Employment Skills Training Initiative (BEST), the Connecticut Workforce Education Initiative, and the Wisconsin Regional Training Partnership. Workplace literacy programs are also being offered in New Jersey and are demonstrating desired effects. For instance, a study on workplace literacy programs in a manufacturing company and a service company in New Jersey indicated that participants in the manufacturing program experienced some wage growth, while those in

the service company program experienced some increase in the quality of their work performance. The study concluded that “for the manufacturing firm at least, the benefits of the training programme in terms of increased productivity probably outweigh[ed] the costs” to the firm (Johnston, 46).

In contrast to the role of unions, both Jurmo (2003) and Imel (2003) found a distinct lack of leadership and support for workplace literacy from funding agencies and from policy-makers. Furthermore, the effect of the WIA has been to shift workplace literacy from being a federal issue to one that is now local. This situation does not help the coordination or integration of the literacy community or its workplace practitioners (Jurmo, 2003; Imel, 2003).

Hollenbeck (1994) asks why there is such a disconnect between the need for workplace literacy programs and the availability of such programs. According to Hollenbeck, the main reason is that employers view the costs of workplace literacy programs as being too prohibitive. If we accept that workplace literacy programs are a good thing and should have public support, then government assistance in the form of subsidies to encourage employers to establish the programs or to provide them with technical assistance and information may be sufficient (Hollenbeck, 1994).

Workplace Literacy in Ireland

The White Paper on Adult Education was, in part, a response to negative attention to Ireland’s adult education policies after its population “demonstrated extremely poor 1995 International Adult Literacy Survey results” (McKenna and Fitzpatrick, May 2004: 2; Conboy, 14). The need to improve its workplace literacy programs was evident when the survey found that most adults with low literacy were already in the workforce. In addition, few companies were offering workplace literacy programs; a 2000 survey indicated that 56% of companies in Ireland had no budget for training staff (NALA).

Adult literacy in Ireland “is conceptualized within a basic skills framework” and includes numerous contexts such as vocational education committees and basic education in the workplace (McKenna and Fitzpatrick, SD, 45). The following section outlines Ireland’s policies to promote adult education by discussing its overall approach – including important institutions, recent legislation, and various programs, as well as government strategies to offer incentives to firms to provide workplace literacy programs, referred to in the literature on Ireland as “workplace basic education” programs.

Adult Education

In recent years, Ireland has increased funding for adult literacy through a green paper in 1998 and a white paper in 2000. The latter presented a National Adult Literacy Plan to be implemented through the National Adult Literacy Agency (NALA). This agency is a non-profit organization that has “set numerical targets and client priorities, implemented a quality framework and integrated literacy with employment, workplace and community-based initiatives” (McKenna and Fitzpatrick, 13; Conboy, 14). The NALA has received funding from the government – through the Department of Education and Science – since 1985 and also supports a National Adult Literacy Coordinator.

The government's National Adult Literacy Plan calls for a National Adult Learning Council with local advisory boards to create "local adult literacy action plans to facilitate effective implementation" (McKenna and Fitzpatrick, SD, 45). It is the responsibility of the National Coordinator to help manage the initiatives of local advisory boards. Adult education programs are delivered by vocational education committees (VECs). One hundred twenty-six local VEC adult literacy schemes provide vocational education free to individuals and groups with low literacy levels. Such initiatives offer adult education for approximately two hours per week to about 23,000 people (McKenna and Fitzpatrick, SD, 46). There is no national curriculum for learners; instead, curricula tend to be developed at the local level, often between the learners and the tutor (McKenna and Fitzpatrick, SD, 46). These vocational education literacy schemes also provide English for speakers of other languages (ESOL) classes (McKenna and Fitzpatrick, SD, 49).

Workplace Basic Education

As indicated above, the white paper on adult education identified the need to increase the provision of workplace literacy in Ireland. Nonetheless, NALA indicates that the concept of workplace basic education is rather new in the country, and the government has started to provide funding for a small number of pilot projects. For example, the Workplace Literacy Strategy Group was established in October 2001 by NALA to promote the development of workplace literacy programs (McKenna and Fitzpatrick, SD, 48; FÁS, 3).

Workplace education programs are being implemented in accord with the 2003 national agreement, *Programme for Sustaining Progress* (PSP) (FÁS, 5; NALA). The programs are described as follows:

A workplace basic education programme includes literacy and numeracy and can incorporate a variety of subjects ranging from communication skills, computer skills, interpersonal skills, problem solving and report writing (FÁS, 4).

In 2002, approximately 46 groups and 300 learners participated in workplace education programs. In addition, NALA certified 16 literacy tutors and published a report for employers that details workplace literacy guidelines. Although the ideal is for employees to participate during paid work hours, such arrangements are sorted out with the employer "and may consist of a blend of employer and employee time" (FÁS, 4; NALA).

Part of NALA's work involved recommending that the government create a fund for workplace basic education. This goal was achieved in 2005, when the Department of Enterprise, Trade and Employment established a Workplace Basic Education Fund (WBEF) to be managed by Ireland's National Training and Employment Authority (FÁS)⁵ with the goal of offering opportunities for employees to "improve their literacy and numeracy skills, on a 100% grant aided basis" (FÁS, 2005: 2). The WBEF was also established to assist the low-skilled or those in low-level jobs.

⁵ FÁS works in consultation with a National Steering Group made up of the Department of Education and Science, the National Adult Literacy Agency, the Irish Congress of Trade Unions, the Small Firms Association, the Irish Small and Medium Enterprises, and the Construction Industry Federation (FÁS, 2005: 5).

NALA and FÁS are working together to develop a model for workplace basic education (funded through WBEF). They are piloting projects over a 16-month period. For example, the Return to Education Programme (also called Return to Learning Initiative) is designed to provide workplace education for Community Employment workers. The program is coordinated by NALA and FÁS and local VECs. An evaluation on the Return to Learning Initiative indicated that the programs were piloted in 2000-2001 in five Local Authorities⁶ (Conboy, 4). The report suggested that the programs were having positive impacts such as high completion rates and “extremely positive” feedback from participants and project coordinators (Conboy, 26 and 58). For instance, participants have experienced increased self-confidence as well as improved literacy and computer skills (Conboy, 51).

Workplace Literacy in France

Funding for continuing training for adults in France is offered through central and regional governments, firms, and households (ILO, 4). In 1997, the funding was broken down as follows: “business and industry contributed 49.8%; the State 38.3%; the regional authorities 10.9%; and households 1.0%” for continuing vocational education and training (EURYDICE and CEDEFOP, 35). Continuing education in France falls under the responsibility of the Ministry for National Education and the Ministry of Employment and Solidarity, with the latter providing the most funding. Funding for training is also provided by the European Union through the European Social Fund.

The following section outlines the ways in which France provides incentives for employees and firms to participate in and provide continuing education and training. Such training is provided to employees in three ways: through the company training plan, by which employers provide paid training for employees; through the Individual Training Leave Benefit (CIF) by which all individual workers have the right to paid leave to pursue training; and, through the Individual Training Right Benefit (DIF) by which “every employee acquires a training-time credit of 8 hours a year within the limits of 6 years...to pursue a vocational training” (CENTRE-INFO 2).

Training Leave

Employees in France have legal rights to training leaves and skills assessments. Legislation enacted in 1971 gave individual workers the right to training leave, *le droit individuel à la formation* or DIF (EURYDICE and CEDEFOP, 34; OECD, 2005: 90). This right applies to all workers. Even self-employed workers (such as farmers) and company managers have the right to training leave through the payment of an annual levy to the government (ILO, 7; CENTRE-INFO, 4). In 2003, a national agreement secured 20 training hours annually for workers (OECD, 2005: 90). Workers gained the right to skills assessment in 1991. This is available to any employee who has worked for five years, provided that one of those years was spent in the particular company from which the employee is seeking leave (EURYDICE and CEDEFOP, 36). In 2004, France introduced the significant innovation of Learning Accounts, which allow individuals to “bank” unused training time available for their future use (OECD, 2005: 90).

⁶ The Mayo County Council, the Meath County Council, the Tipperary South Riding, the Offaly Local Authorities, and the South Dublin County Council (Conboy, 13).

Workplace Training

As indicated above, in addition to the right to training leave, employees can also receive training through workplace training plans. Funding provided by employers for training “is derived from their statutory obligation to take part in the funding of training” (ILO, 9). In comparing policies in the UK and France, Christine Greenhalgh argued that France has an “interventionist policy” to encourage firms to provide training (1). Referring to the employer levy system introduced in France in 1972, she called it “a useful policy” since “it forces all employers to train or pay an equivalent tax” (Greenhalgh, 17, 19). The annual employer levy is determined based on the firm’s size. For instance, firms with more than 10 workers must pay 1.5% of their gross annual payroll, while those with less than 10 workers pay either 0.15% or 0.25% (ILO, 9; CENTRE-INFO, 4). In practice, however, firms pay, on average, 3%. This average reflects the fact that business sectors are typically required to provide more than the legal minimum through their collective bargaining agreements (CENTRE-INFO, 4).

The amount that a firm is obligated to spend on training can go to either a public or private provider. The National Association for Adult Vocational Training (AFPA) is a public provider of training, with 262 training centers subsidized by the Ministry for Employment and Solidarity (ILO, 10; EURYDICE and CEDEFOP, 34, 36). The employer levy seems to encourage firms to provide training. In 1997, for example, firms funded 3,579,000 training programs and 27,700 private sector workers used their individual training leaves. Although Greenhalgh tends to emphasize the benefits of the French levy system, she also provides recommendations for its improvement. She suggests that a set proportion of the training be offered to low-skilled workers so that employers do not simply train high-skilled workers, and that a system of taxation be created to discourage labour mobility after the training in order to curb the “worker poacher problem” (Greenhalgh, 22).

Workplace Literacy in Germany

The OECD thematic review of adult education in Germany indicated significant strengths of that country’s approach as well as a potential for the future weakening of the system. Indeed, Germany’s approach offers an important example since it has high participation rates and exhibits a different regulatory structure for employer provision compared to other countries considered in this report. Numerous collective agreements across various industries play a substantial part in requiring employer provision of training for workers.

The OECD review team indicated that there was high participation in adult learning in Germany but that participation declined somewhat in 2005 (2005: 9). And as with the international trend, such learning is provided more for skilled workers than unskilled. Nonetheless, the federal government supports the principle that unqualified workers should have the right to public support to increase their qualifications and it offers “means-tested subsidies to cover the costs of formal courses” as well living expenses (OECD, May 2005: 11). The Federal Ministry of Education and Research (BMBF) has its own agency – QUEM – which helps coordinate eight regional centers that provide educational training for low-skilled workers. In addition, under the 2001 program Lifelong Learning for Everyone, the German government subsidizes a wide array of pilot programs that offer continuing education and training (Kruse, 9-11).

Despite the strengths of the German approach to adult education, however, the OECD review team suggested that the country was moving towards a more market-led orientation by making adult education and training part of its labour market policy and focusing more on targeting the long-term unemployed rather than on providing long-term skills training (OECD, 2005: 111). For instance, public spending on long-term training programs declined from 32% in 2002 to 21% by 2004 (OECD, 2005: 111). This trend is also evident in changes in the provision of unemployment benefits, which require that recipients go through assessment and training programs (OECD, May 2005: 15). Although the OECD review team concluded that, overall, the German approach remains strong, the team also pointed to a growing “over-emphasis on economic efficiency in the formulation of contemporary public policy” and recommended “the reassertion of the social justice and educational development goals of public policy, in the face of the dominant economic tendency” (May, 2005: 24).

The following section outlines the overall approach to adult education in Germany, emphasizing the role of adult education centers and the growing role of vouchers as part of this “economistic tendency,” and highlights the role of employers in the provision of training.

Adult Education

The federal government’s role in adult education involves the provision of subsidies to institutions, programs and individuals. The BMBF helps to coordinate educational training with the Lander (state) ministries. The Learning Region Program helps coordinate regional education providers. It is funded by the federal government and the EU and in 2003, it had 79 projects (OECD, May 2005: 11). The federal government offers subsidization for adult education through both public institutions like Hamburg’s *Volkshochschule* as well as through private but “publicly recognized and financed institutions” like the Cologne’s *Tages und Abendschule* (OECD, May 2005: 12).

Adult Education Centres (*Volkschhochschulen*) are the most common institutions for the provision of adult learning and are operated by municipalities (OECD, Oct. 2004: 6). The centers are largely modeled on the Danish and Swedish Folk High Schools, following Grundtvig’s principles of liberal adult education (Reischmann, 8). The details of this approach to adult education will be elaborated on in the sections on Sweden and Denmark, but with regard to Germany, the adult education centers follow a “community-based” style of learning with a wide range of available topics (Reischmann, 8). About 60% of the funding for the centers comes from the federal government and municipalities and 40% from participants (Reischmann, 8). However, literacy courses are also offered through the adult education centers and are funded by the federal, state, and municipal governments (OECD, Oct. 2004: 34). Additional funding is also provided through the EU.

In line with its shift towards greater reliance on the market to provide adult education, Germany introduced a voucher system in 2003. The learning vouchers target unemployed and low-skilled adults (OECD, 2005). Individuals discuss their need for further education and training at labour exchange offices, and then vouchers are used for programs offered by licensed education providers (OECD, Oct. 2004: 34). The vouchers help control the number of people receiving public subsidies by requiring that participants go through accredited providers (OECD, May 2005: 14). In addition to this public funding for adult education and training, private and for-profit providers – such as workplaces – make up a significant share of provision in Germany.

Workplace Education and Training

Workplace learning is a significant part of adult education and training in Germany, with companies or employers providing the largest share (Reischmann, 7; OECD, May 2005, 12). In contrast to the tax-incentive system of employer levies used in France, German companies are not legally obligated to pay a certain portion of their payroll costs towards training; instead, workplaces are typically bound to training through various collective agreements (Reischmann, 7).

To understand the role of firms in financing adult education and training, the OECD review team distinguished between “employer-sponsored and self-sponsored learning”:

Employer-sponsored work-based training, by definition available only to employees, is in practice financed largely or wholly by the employer, with training mainly occurring during working hours and the employer bearing most or all of the tuition costs (OECD, 2005: 16)

Although German firms contribute a great deal of funding for workplace training, they follow the typical international pattern by providing a significantly greater amount of training for their highly skilled workers. Nonetheless, collective bargaining agreements are playing a growing role the provision of workplace training, with unions gaining the right to such training for workers across certain industries and particularly targeting the low-skilled (OECD, May 2005: 16).

In contrast, self-sponsored learning involves payments by individuals, but may also include public subsidies. The German federal government offers substantial public funding for the least skilled because they have the greatest need for training and the lowest ability to pay (OECD, May 2005: 16). The *Länder* Employment Offices are also responsible for providing “means-tested” funding to individuals for tuition and living costs.

The workplace education and training provided by employers largely involves industry collective bargaining agreements. It is offered in the vocational training “dual system,” which includes both training in the workplace and in vocational schools (*Berufsschule*) (ILO, 1). The system was established in 1969 under the Vocational Training Act, and responsibility for general and vocational schools belongs to the *Länder* ministries of education (OECD, Oct. 2004: 6; Kruse, 8). Such vocational training is a significant part of adult education in Germany, and the provision of workplace learning is a particular part of the system. According to the ILO, one-third of young adults participate in vocational training through the dual system (1). Participants are taught basic, practical job skills in accord with national standards. They spend about three to four days training at the company and two days at the *Berufsschule* (ILO, 1). Courses offered at the *Berufsschule* are in “general education subjects, namely German, social studies and economics, religion and sport” (ILO, 2).

As indicated above, collective bargaining agreements play an important role in the provision of training by employers. Both the *right* to training through financial and unpaid leave, as well as the *content* of training are governed by collective agreements (OECD, 2005: 70), and a large number of collective agreements contain sections on training. Some examples include the Volkswagen “Auto 5000” agreement (2001), the metal and electronics industries of Baden-Württemberg agreement (2001), the Daimler Chrysler agreement (2002), the chemical workers’

collective agreement (1993), the social insurance fund of the scaffolding trade (1981), the training fund for the agricultural and forestry sector (1996), and the Deutsche Shell agreement (1988) (Kruse, 27-43; OECD, 2005: 90-92; OECD, Oct. 2004: 8). Under the Works Constitution Act, both employers and work councils are responsible for the provision of in-company training, and the work councils have a great deal of influence (OECD, 2005 91; OECD, Oct. 2004: 8). Indeed, “almost 20% of German works councils have concluded company agreements on training activities” (OECD, 2005: 91).

The Auto 5000 agreement involved a project undertaken at one Volkswagen production site. Under this agreement, unemployed and low-skilled workers were hired on a “cost-sharing” basis (OECD, 2005: 90). The initial training is paid for by the company, and the follow-up “costs of *ongoing training* ... are fully covered by the company;” the company “also pays half of the extra three hours per week needed on average for such training” (Kruse, 43). Here, cost-sharing refers to the ongoing training of three hours per week, for which employers contribute wages covering half the time and employees contribute the other half by using their personal time (Kruse, 43; OECD, 2005: 90).

The collective agreement in the metal industry of Baden-Wurttemberg is particularly significant since it involves a yearly meeting between the employees and supervisors to discuss and agree upon the training needs. The yearly meeting means that “the need for further and continuing training is defined from the ‘bottom up’ by individual employees and no longer from the ‘top down’ ” (Kruse, 29). A joint agency has been created that is responsible for final arbitration if agreements cannot be reached (OECD, 2005: 92). The agency also assesses the qualification needs of the metal industry and provides information on training. In addition to the yearly meeting, the collective agreement also requires the company to pay for the workplace training and for employees to take part in the training (Kruse, 29-30). Leave for personal training – that is, training not required by the company – is also covered under the collective agreement, which allows for up to three years leave after five years of employment (Kruse, 30). One year after this accord was reached, Daimler Chrysler followed the lead of Baden-Wurttemberg by signing its own agreement. The Daimler Chrysler agreement requires all plants to discuss their training needs with works councils on an annual basis (OECD, 2005: 92).

Collective agreements in Germany are the most significant regulatory structure requiring employers to provide training. Nonetheless, associations such as *Arbeit und Leben* and *Tages- und Abendschule Koln* also play a role in working with companies to provide training. The *Arbeit und Leben* provides vocational education courses that “are funded jointly by the employer (as wage payments), public authorities (as tuition subsidies) and participants (as tuition fees)” (OECD, May 2005: 18). This association provides educational classes oriented towards group learning (OECD, May 2005: 19). *Tages- und Abendschule Koln* formerly offered a program that combined classroom education with paid employment. The combination of these kinds of associations, the dual system of vocational education, collective agreements, and public support to individuals constitutes Germany’s approach to the provision of workplace education and training.

Workplace Literacy in Sweden

Sweden's high ranking in the International Adult Literacy Survey (IALS) as well as its high participation rates in adult education and training programs indicate that this country's approach to such programs can offer useful examples for other countries with lower literacy levels and participation rates.⁷ In comparing Canada and Sweden using his own measurement of "functional illiteracy," Scott Murray argues that "Canada with its 14.6% rate [is] trailing Sweden at 7.5%," making Sweden "first place in the world" (CBC website). Sweden's approach to adult education exhibits a wide-ranging role for government through national funding for institutions and individuals, as well as national legislation which grants individuals various rights to education.

Another working paper produced by the CCSD under this project compares the approaches used by various OECD countries to promote adult education, and it offers a useful distinction between the "human capital" and the "individual skills" perspectives on adult education and workplace literacy (5). The first perspective tends to prioritize ends such as "social equity and justice," while the latter emphasizes the economic benefits for individuals (CCSD, 4). In comparing the approaches to adult learning used in Canada and Sweden, Nayda Veeman identifies a similar categorization – that of a "human capital perspective" compared to a "social equity or humanistic perspective" (157). While the Swedish approach acknowledges the benefits for individuals as well as the contributions to the economy, it tends to stress the importance of providing adult education as part of a contribution to social equity and democracy.

In its Background Report to the OECD Thematic Review on Adult Learning, Sweden explains its reasons for promoting the widespread availability of publicly funded adult education and training. Adult education is used as "an instrument" to achieve various goals, such as curbing unemployment, encouraging an educated labour force, and promoting economic development (OECD, 2000: 11). In addition, the country also promotes publicly funded adult education in order to improve social equality, enhance "quality of life" and thus promote democracy (OECD, 2000: 11-12). Veeman particularly emphasizes Sweden's social rather than economic goals in this regard:

Despite the rhetoric relating adult education to competitiveness and the need for the Swedish economy to compete internationally through knowledge and a skilled workforce, the belief in education as a tool for achieving social equality seemed to be commonly understood as part of the public philosophy in Sweden (160).

The Swedish approach to adult education outlined below emphasizes how the system promotes greater equality, particularly through targeted initiatives that provide adult education for the disadvantaged. The discussion outlines the overall structure and scope of adult education in Sweden, including workplace learning and the role of private sector firms in providing adult education and training. An important clarification is needed here regarding terminology. The concept of "workplace literacy" is not used in the literature on Sweden. In fact, Veeman emphasizes this point in her dissertation: "Swedish policy documents talk of raising 'the

⁷ Nordic countries (Denmark, Finland, Norway, Sweden, Iceland) generally score the highest on adult literacy surveys (Truijnman, 284) and some (i.e. Denmark, Finland and Sweden) rank the highest in country participation for adult education programs (OECD, 2005: 22; Truijnman, 285).

educational level' rather than reducing illiteracy" (155; see also Walker et al., 8). She explains that the term literacy is probably not used because literacy rates are quite high in Sweden – “ ‘literacy’ is not an issue in Sweden. Everyone here can read” (Norberg quoted in Veeman, 155).

Adult Education and Training

Sweden takes a decentralized approach to adult education and training. The national government provides a large amount of public funding to the 288 municipal governments which, in turn, are responsible for the implementation of adult education programs (OECD, 2000: 30; Veeman, 59). This responsibility to municipalities falls under the Swedish Education Act (1985). Although Sweden's “public sector spending on education is amongst the highest in the world,” its private sector funding for “education ranks among the lowest in OECD countries” (OECD, 2001: 5-6). The national government provides public funds for a wide array of formal and non-formal education.

The Swedish “system” of adult education is comprehensive and takes many forms. Veeman suggests that there are three forms of adult education: “popular education, tripartite labour training, and municipal adult education” (60). The OECD Country Note on Sweden, however, indicates five “inter-related strands” of adult education and training: basic adult education to upper secondary school level; adult education at the post-secondary level, such as Advanced Vocational Training; Popular adult education (e.g. Folk High Schools and Study Circles); Labour Market Training through the Ministry of Industry; and, “in-company” or workplace training (OECD, 2001: 10). It should be noted that these classifications are not entirely clear-cut, since all strands are interrelated.

Basic adult education corresponds to the level of upper secondary schooling (nine-year compulsory education). Such education is offered through formal channels such as Municipal Adult Education (*Komvux*), the two state-funded National Schools for Adults (*Norrköping* and *Häarnöping*), Swedish for immigrants (SFI), as well as more through informal “popular education” channels such as Folk High Schools and Adult Education Associations (e.g. Study Circles) (OECD, 2001: 11; OECD, 2000: 27-28). Basic adult education is a right of all adult inhabitants in Sweden, which municipalities are obligated to provide or make available “through inter-municipal payment to the municipality arranging the education” (OECD, 2000: 26). Funding for basic adult education is provided through state grants to municipalities and institutions. In addition, the Swedish National Board of Student Aid (CSN) provides funds to students through grants and loans, prioritizing those with the least education (Veeman, 146).

Post-secondary vocational adult education is offered through Advanced Vocational Education (which started in 1996) and is provided by municipalities, universities, university colleges, and private firms (OECD, 2001: 11, 26). This strand of adult education follows a “dual approach” to learning by combining school-based education with work-based education (OECD, 2001: 12). The goal is to help encourage “networking” with employers in order to aid the transition from school to work. Advanced Vocational Education has a relatively high success rate: “Three out of four students who finished their education during the year 2000 passed their examination, and 74% knew they would be employed within three months of their exams” (OECD, 2001: 26).

More informal or popular adult education – such as Folk High Schools and Study Circles – is an important part of the Swedish system. It has a long history dating back to the 19th century and has been expanded significantly over the last few years. Folk High Schools, based on the Danish model, receive state grants on the condition that education is provided for free (Veeman, 61; OECD, 2000: 27). These schools have a high degree of autonomy since they are owned largely by popular movements and organizations and set their own “courses⁸ to the individual needs of participants” (OECD, 2001: 23). Folk High Schools run both short courses (less than two weeks) and longer courses, and they offer “around 34,000 annual study places” (OECD, 2000: 28). Study Circles are based on self-organized and cooperative learning and are offered through the 11 national Adult Education Associations⁹ (OECD, 2001: 24). Study Circles accommodate approximately 2.8 million participants per year (OECD, 2000: 28), and the Study Associations that run them are also important for the education of workers. Courses in both Folk High Schools and Study Circles tend to focus on, but are not limited to, visual arts (e.g. handicrafts) and music.

Labour market training, or what Veeman calls “tri-partite labour market training,” was first established in 1938. It is a cooperative initiative among government, employers, and unions (61), and is fully funded by the state through the Swedish National Labour Market Administration. It provides mainly vocational training with the aim of guiding individuals to employment (OECD, 2000: 30). Labour market training targets unemployed adults, particularly the long-term unemployed, but under “certain circumstances” it can also be made available to refugees, people in prison, people under age 20 with “functional impediments,” and people employed who wish to upgrade (OECD, 2000: 30). Approximately half of such training is run by the state-owned education company, *Lernia*, but some private providers also participate. This vocational training tends to include such areas as computers, telecommunications, engineering, electrical engineering, and electronics.

As suggested above, Sweden takes a comprehensive and largely publicly funded approach to adult education and training, demonstrating a commitment to enhancing social equity and democracy. This commitment is reflected in Sweden’s targeting of disadvantaged groups. The 2005 OECD report, *Promoting Adult Literacy*, indicates that while there tends to be under-investment in adult education across OECD countries for “certain disadvantaged groups such as low-skilled adults...[and] low-wage earners” (30), in Sweden, the government promotes programs that prioritize these groups as well as others like the unemployed, individuals with functional impediments, and immigrants. For instance, Sweden provides Swedish for immigrants (SFI) as well as free language courses for everyone (OECD, 2005: 78). The Adult Education Initiative, which provided additional funding for many of the above-mentioned programs, was launched over a five-year period, from 1997 to 2002, in part to help target “in the first instance adults who [were] unemployed and who either completely or partially lack[ed] 3 year upper secondary school competence...[as well as] employees with low levels of education” (Ministry of Education and Science Sweden, 1). For each of the five years, Sweden invested \$345 million Euro in the program to fund 100,000 study places annually and helped provide free upper secondary education (OECD, 2001: 13; OECD, 2005).

⁸ Some also follow “curriculum regulated” courses in subjects such as Swedish, English, social studies and mathematics (OECD, 2001: 23; OECD, 2000: 28).

⁹ For a list of the 11 Study Associations in Sweden, see OECD, 2000: 29, Box 1.

Workplace Education and Training

In addition to the outline of adult education and training above, workplace education and training is described here to draw attention to the role of firms in promoting such training and the role of governments in creating incentives for firms to do so. Advanced Vocational Training and labour market training are relevant since they involve private firms, and Adult Education Associations (which run Study Circles) are relevant to workplace education and training. For instance, in Umeå, a day school was run through the Trade Union Affiliate (ABF), and workers were given time off from work while being paid by the union (strike pay equivalent). Workers participated in the program one day a week over a 30-week period, studying Swedish, English, computers and mathematics (Walker et al., 15).

The approach used by the municipality *Vaggeryd* offers an example of how workplace training can be incorporated with publicly promoted labour market training. Through the “*Vaggeryd Model*,” the employment office prepares an education plan based on the needs of the local labour market (OECD, 2000: 53). The program consists of placing participants in numerous workplaces through which they receive a variety of coordinated training in work settings. The program targets the long-term unemployed and unemployed immigrants (OECD, 2001: 27). Once a participant has finished the program in one company, they can begin in another, rotating through two to five workplaces, making connections with several potential employers and improving their skills along the way (OECD, 2000: 53; OECD, 2001: 28). The National Information Technology Program (SwIT) offers another example of labour market training undertaken through partnerships with “host companies” (OECD, 2000: 52; OECD, 2001: 27).

The distinction between publicly funded and privately funded initiatives in Sweden is thus not rigid. However, the OECD Country Note indicates that there is a lack of information on “work-related, in-company training” in Sweden, suggesting a “blind spot” or possible “bias in the way adult education and learning is being promoted” that favours public over private provision (OECD, 2001: 14). This lack of attention to the potential role of private firms is evident in the program “of visits prepared for the OECD [review] team where the structure and content of in-company training basically was left out” (OECD, 2001: 36, see Appendix 3).¹⁰ The OECD’s review emphasized a need for Sweden to reduce public funding and encourage more firm-based involvement in order to better “balance” public and private contributions (OECD, 2001: 14). However, private contributors have already been encouraged through labour market training and the Adult Education Initiative.

In Sweden, workplace education and training is offered through what is referred to as “in-service training.” In-service training is widely available, with approximately half of all employees participating for an average of five to seven days a year (OECD, 2001: 14). Since joining the European Union, Sweden has received co-financing for in-service training through EU Structural Funds: “Up to 1999, a total of SEK 5 billion had been released, based on a co-financing between EU (25%), the Swedish State (25%) and the enterprises (50%)” (OECD, 2001: 14). The 2003 OECD report, *Beyond Rhetoric: Adult Learning Policies and Practices*, indicates that across OECD countries, employees in large firms are more likely to receive workplace training than those in smaller firms (52). This trend holds true in Sweden: small firms (those with less than nine employees) receive the least amount of firm-sponsored training, followed by medium-large

¹⁰ Program of visits also available at <http://www.oecd.org/dataoecd/49/46/2472335.pdf>

firms (with 100-499 employees); large firms (with more than 500 employees) offer the most training (OECD, 2003: 53).

In Sweden, incentives for adult education and training are given to employees through legislation offering the right to paid leave from work, as well as through more recent proposals for individual competence accounts. Legislation in the 1970s and 1980s granted “employees the right to leave of absence from work for studies and to participate in education during paid working hours” (OECD, 2001: 14). Employees can decide the length of such leaves, as long as they have worked a total of 12 months over two years or a total of six consecutive months, but the employer can opt to postpone such leaves for up to six months (OECD, 2000: 20). The employee is guaranteed the same position and pay upon their return. However, despite this legal right to leave, it is used by less than 1% of the working population per year (OECD, 2001: 17).

Individual competence accounts are relevant to the role of private firms in adult education because they involve incentives for employers. Providers such as the state and employers contribute to these accounts to help encourage employees to participate in upgrading education and training. The government has proposed establishing a national system for such individual competence accounts as well as “a reduction of 10 per cent in payroll taxes of the amount that an employer contributes to an employee’s account,” thus offering financial incentives for employers to contribute (OECD, 2001: 17).

The Swedish government offers extensive options for adult education and training, and provides a large amount of public funds for numerous formal and non-formal approaches. The array of options outlined above, in combination with targeted initiatives for disadvantaged groups, support Veeman’s claim that Sweden has a strong commitment to enhancing social equality through educational opportunities. This commitment is also evident in a statement by Lena Hallengren, Minister of Pre-School Education, Youth Affairs and Adult Learning, that “you always have another chance...it’s never too late” in Sweden to improve your education (CBC). Despite its high international ranking in literacy and high participation rates in adult education programs, Sweden continues to pursue other initiatives to improve its adult education and training system. The Adult Education Initiative (1997-2002) and the possibility of a national system of individual competence accounts offer examples of “the high degree of experimentation that the Swedish are willing to pursue to find solutions and effective practice” that improve adult education and training (OECD, 2001: 22). There is, however, much more emphasis on public rather than private provision, reflecting a lesser role for firms in providing workplace education and training.

Workplace Literacy in Denmark

Like Sweden and other Nordic countries, Denmark scored high on the IALS, it has among the highest participation rates in adult education and training, and it has a strong commitment to publicly funded educational programs and institutions (OECD, March 2002: 9; OECD, 2005: 22; Truijnman). And as we saw in Sweden, Denmark’s approach to adult education and training involves a commitment to public funding and universal access. The Danish Background Report for the OECD (March 2001) maintained that “equality” in the provision of education “forms an important basis for the Scandinavian welfare model and is an important part of the Danish

overall policy agenda” (5). The Danish approach to the provision of adult education thus follows goals of social equity and involves a public responsibility to fund adult education and training as well as liberal adult education (Danish Ministry of Education, 1, 10).

The Danish commitment to adult education dates back to the 19th century and the development of the Folk High Schools movement (OECD, March 2002: 12). Folk High Schools are now part of an established tradition of liberal adult education in Denmark. The vocational education system developed in the 1950s and 1970s. In 2000, the Danish parliament adopted the adult education and training reform (VEU-Reform) (OECD, March 2002: 21). Although Denmark allocates a large amount of public funding for adult education and training, there is little information on employer provision of training in the OECD review. Nonetheless, state programs such as adult vocationally oriented education (AMU) and Basic Adult Education (GVU) offer work-oriented training and tend to involve the participation of workplaces. This section provides an overview of Danish policies towards adult education and training, with particular attention on how employers are involved in the provision of workplace education.

Adult Education and Training

Denmark is among the highest ranking countries in the provision of public funding for education. Indeed, Denmark is the third highest contributor to education compared to other OECD countries (OECD, March 2002: 8). For all education levels, 95% of provision is public and 5% private. The Ministry of Education and the Ministry of Labour are the main branches of government that allocate public funds through a “taximeter” system (OECD, March 2002: 19). Denmark’s participation rate in adult education is also about four times the OECD average (9). Apart from the basic education system in Denmark, adult education and training can be generally divided into three categories: Adult liberal education; General adult education (AVU); and Adult vocationally oriented education (Danish Ministry of Education, 1; OECD, 2001: 34). The adult vocationally oriented education, particularly the Adult Vocational Training (AMU) and Continuing Vocational Training (CVT), are relevant to the discussion later of the role of workplace training and financial incentives for firms in the country. Here, the role of adult liberal education and general adult education (AVU) will be considered.

According to the OECD, the concept of “interaction” is central to the Danish approach to adult education (2001: 38). For instance, interaction is at the basis of Danish Folk High Schools, which involve group learning, universal access and student choice of topics and teachers, with an emphasis on personal development and lifelong learning (Danish Ministry of Science, Technology and Innovation, 5; OECD, March 2001: 34). The Folk High Schools developed out of a movement in the early 19th century to provide opportunities for a group of farmers to learn (OECD, May 2002: 12; OECD, March 2002: 69). That movement was also part of larger, evolving ideas about liberal adult education at the time. A 19th century priest and philosopher, N.F.S. Grundtvig, put forth the argument that lifelong learning for all citizens was necessary for a democratic society (Danish Ministry of Science, Technology and Innovation, 5; OECD, March 2002). And as noted earlier, Sweden developed its own Folk High Schools based on the Danish model.

Today, about 90 Folk High Schools in Denmark offer a wide variety “of theoretical and practical subjects ranging from history, literature, and philosophy to sports, photography, pottery and

many other arts and crafts” in courses lasting from one week to 10 months (Danish Ministry of Science, Technology and Innovation, 5). Folk High Schools are independent schools that set their own courses but offer some of the general courses set by the Ministry of Education. The schools have been financially supported by the state since 1851 (Danish Ministry of Education, 3). The Folk High Schools constitute the core of liberal education in Denmark, which also includes evening schools and Day Folk High Schools, which were established in 1970 (OECD, March 2002: 14; Danish Ministry of Education, 4). The state co-funds liberal adult education with financing through the Ministry of Education; it is allocated by the municipalities and supplemented by user fees from participants (Danish Ministry of Education, 10).

A certification system in Denmark establishes a skilled worker equivalency of General Adult Education and adult vocationally oriented education to the Vocational Upper Secondary Level in the Basic Education System (OECD, March 2002: 16-17). Nonetheless, liberal adult education – which makes up a significant part of adult education – is not part of the certification system. The OECD review team recommended that certification be expanded to include non-formal adult learning, particularly liberal adult education (OECD, March 2002: 19).

General Adult Education (AVU) is another significant branch of adult education in Denmark. It is provided through General Adult Education Centres (VUC) and involves the provision of general adult education, organized around single courses with examinations to help improve participants’ general knowledge in areas such as Danish, other languages, natural sciences, mathematics, information technology and psychology (OECD, March 2001: 47). Other programs offered through General Adult Education are Danish as a second language for foreigners, special education for handicapped adults and higher preparatory examination (HF) (OECD, March 2002: 14; OECD, March 2001: 35). In 2000, VEU-Reform also established preparatory adult education (FVU), which falls under the category of General Adult Education, providing courses in reading, writing, and mathematics to help adults develop basic literacy skills to participate in the workforce (OECD, March 2001: 26).

Although Denmark scored high on the IALS compared to other OECD countries, the VEU-Reform was developed to respond to a perceived weakness in the provision of adult education (OECD, March 2002: 8). As indicated, the reform established preparatory adult education (FVU) as well as another new system, the Adult Education System, which includes Basic Adult Education (GVU) and three further advanced levels of adult education (OECD, March 2001: 26). GVU is provided through county councils and combines past education and work with courses to attain the skilled level (27). The reform also established two new councils – the Adult Education Council and the Council for General Adult Education – and one new institution – the Labour Market Institution for Financing of Education and Training – to help coordinate activities and offer recommendations to the Ministry of Education and the Ministry of Labour (OECD, March 2002: 23; OECD, March 2001: 32).

Workplace Education and Training

As with workplace education and training in Sweden, Denmark emphasizes the role of public programs in the provision of training rather than the role of employers in providing such training. The role of employers tends to involve publicly funded adult education and training institutions and programs. For instance, the preparatory adult education system (FVU) mentioned above is

organized around the daily lives of participants, so some activities take place in workplaces. Also, the adult vocationally oriented education in Denmark includes Continuing Vocational Training (CVT) programs, Adult Vocational Training (AMU), Adult Vocational Education and training (VEUD), and Basic Adult Education (GVU). Of these programs, the first two – CVT and AMU – are significant in terms of their involvement in workplace training.

Adult vocationally oriented education is under the responsibility of the Ministry of Labour, and there are 150 providers, such as AMU centers and Vocational Education Training (VET) colleges (OECD, March 2002: 26). According to the Danish report to the OECD, “AMU is a labour market political tool and, therefore, has other purposes than the strictly educational purposes” (March 2001: 48). The AMU is designed as a labour market tool to work with enterprises and respond to training needs in the labour market (OECD, March 2002: 26; OECD, March 2001: 48). A program offered from 1997-2000 through the AMU system, The Integrated Delivery of CVT, worked in partnership with enterprises (OECD, March 2001: 65). These CVT programs were designed to meet the needs of the labour market and involved mainly employed adults (Ministry of Education, 6). Workplace training provided by the company Randers Reb offers another example of partnerships between firms and the AMU system (OECD, March 2001: 35). The training was offered through Randers Reb and the local AMU centre, and involved personal tutoring of unskilled workers for three to five months, followed by modules in technical training.

These examples demonstrate how Denmark’s commitment to public financing of adult education involves programs that work with the enterprises. In addition, the Danish government offers tax incentives for firms to provide training. The VEU-Reform included a tax exemption for the costs of training in order to encourage employers to fund their own training programs (OECD, March 2002: 27). Nonetheless, both the Danish report to the OECD and the OECD review recommended greater funding from firms to help balance the strong public support of adult education in Denmark (OECD, March 2002: 30); OECD, March 2001: 70).

Conclusion

The international context regarding the provision of adult education in general and workplace literacy in particular is relevant to the Canadian context, since OECD countries share similar labour market challenges in the “information age” of the global economy (McKenna and Fitzpatrick, 9). Indeed, since Canada’s approach to adult education involves a minimal role for the federal government, the diversity of workplace literacy policies and programs discussed in this report points to a range of avenues for policy development in Canada. For instance, Australia demonstrates a strong commitment to vocational education and training as well as workplace literacy programs such as WELL and LLNP. The UK approach involves a comprehensive system of adult education, as well as the development of projects to encourage workplace education and training, such as Employer Training Pilots. France demonstrates a tax-based approach to encourage employers to provide training, and Germany shows how collective bargaining agreements can oblige employers to offer training.

The most evident trend among the different countries considered in this report is the tension between public and private provision of workplace literacy training and adult education. In terms

of extremes, Sweden and Denmark demonstrate cases of strong public spending on adult education, while the United States uses an approach based largely on the private sector. Overall, however, countries tend to follow a mix of both public and private provision. Germany, which does not clearly fit into either extreme, offers an example of a country that has historically had strong public funding for adult education but that is increasingly developing a more market-driven orientation. One concern about this trend is that a decreasing public role could diminish political leadership and overall commitment to the provision of literacy programs in the workplace and to adult education generally. As we have seen, the Nordic countries, which tend to rely upon significant public commitment and leadership, emphasize the relationship between adult education and social equity. Other countries more often emphasize economic reasons for investing in upgrading the basic skills of their workforce. What the international context reviewed here makes clear is that workplace literacy programs and adult education can be supported because they can contribute to economic growth as well as to social equity – providing both individual and societal benefits.

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