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The inclusion and construction of the worthy citizen through lifelong learning: a focus on the OECD

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This paper argues that underlying the OECD’s promotion of inclusion in, for and through lifelong learning is the notion of an ‘active citizen’ who establishes their worth through learning and, ultimately, competence. Through the critical examination of recent OECD policy documents on adult and lifelong learning, the paper also calls for a re-examination of the purported goals of inclusion and participation, essential elements of ‘inclusive liberalism’.

Keywords: lifelong learning; OECD; inclusive liberalism; citizenship; discourse analysis

Overview and context

The Organisation for Economic Co-operation and Development (OECD) currently plays a pivotal role in the development of policy on adult education and lifelong learning worldwide (see Henry et al. 2001; Rubenson forthcoming). While the organisation does not strictly set policy, it helps steer policy formation in its member countries, having assumed the role of semi-autonomous and even dispassionate educational think-tank (Istance 1996). By ‘provid[ing] a controlled environment for the creation, development and dissemination of political discourse’ (Dostal 2004, 440), the OECD has set, and continues to set, the tone and direction of discourse and policies of lifelong learning in many countries.

This paper examines recent OECD documents on lifelong learning and adult education with a view to understanding how adult learning is positioned, promoted and conceptualised. In this critical policy analysis (Ball 1997; Ozga 2000; Taylor et al. 1997), I draw on the political theory of inclusive liberalism (see Craig and Porter 2003; Porter and Craig 2004) to show how the OECD both focuses on the notion of inclusion through lifelong learning and also positions itself as attempting to carve out a path between Keynesian welfarism and Friedmanesque neo-liberalism. ‘Inclusive liberalism’ is a term coined by Craig and Porter (2003) used originally to describe the shift in policy of the World Bank away from ‘frank neoliberal structural adjustment to a softer more inclusive poverty reduction and good governance agenda’ (Craig and Porter 2006, 1). The authors explain that, like in the World Bank, there has been a shift in the ideology of transnational and supranational organisations, as well as many centre-left governments, away from ‘negative liberalism’, or the neo-liberal ideal of

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getting governments out of markets through deregulation, decentralisation and reduction of social spending, to more ‘positive liberalism’, which they claim is centred on inclusion. Inclusive liberalism, according to Craig and Porter (2006), retains much of the more negative neo-liberalism while adding to it the more positive liberal frames of ‘empowerment’ for participation and social inclusion by engendering increased moral obligations to community and civil society. While neo-liberalism can be understood as the ‘the repudiation of the Keynesian welfare state and the ascendance of the Chicago School of political economy’ (Brown 2005, 38), inclusive liberalism seeks to bridge the divide between market and state, economy and society, private and public. Moreover, the central goal of policy discursively becomes bringing in or including all those who may have been left behind by the changes in society wrought by globalisation and by the shift towards a knowledge-economy (see also Giddens 1999).

This paper has two aims: first, to document where inclusive liberalism is visible in these OECD policy documents; and second, to show how inclusive liberalism is operationalised in regards to lifelong learning. In these texts, the OECD focuses on social inclusion and endorses partnerships, cooperation and the concept of ‘unity through diversity’. However, inclusion in and through lifelong learning is often issued as a moral quasi-religious imperative to activate individuals to undertake their citizenry duty to learn and, in doing so, adopt certain values, behaviours and personality traits. Indeed, the ‘call to conversion’ to lifelong learning makes clear that not all elements are included equally, and that participation is heralded on the basis that it helps in the construction of an essentialised ideal of an active and worthy citizen. In these OECD documents a worthy citizen is constructed as having a moral imperative to engage in learning to help their country grow in terms of GDP, to prevent the need for a broad social welfare system and to avert widespread social exclusion. Citizens who engage in the process of lifelong learning are seen as deserving, and accordingly will be rewarded – both financially and in terms of quality of life. Drawing on Bourdieu (1998) and Weber (1958) I problematise inclusive liberal ideology and discourse in regards to how lifelong learning and citizenship are interwoven and conceptualised.

In what follows, I first provide a discussion of the research methodology followed by an overview of the theoretical framing of this research. I then present my findings, which have been divided into two sections. In the first section I explore the ways in which inclusive liberal ideas and discourse are present in the OECD documents within the context of lifelong learning. The second part of the findings examines and critiques the ways in which inclusion, citizenship and lifelong learning are brought together. This second section explores three main questions in regards to the positioning of lifelong learning in the OECD: (1) Who is a good citizen? (2) What makes the good citizen worthy? (3) How is the good citizen created? I end the paper with a broader discussion of the tensions between inclusive liberalism and neo-liberalism and of the general interconnections between inclusion, inclusive liberalism, the OECD and lifelong learning.

Methodological considerations
The purpose of this research was to examine the ways in which the OECD has positioned, promoted and conceptualised lifelong learning in its more recent influential documents. The reason I chose to focus on the OECD is three-fold: First, the OECD was one of the first organisations to awaken to the idea that learning and education should be an ongoing endeavour, not solely something that happens in one’s childhood.
and adolescence (Papadopoulos 1994); the second reason is due to the organisation’s very early promotion of education and training, within a human capital model, as a ‘national investment’ (Papadopoulos 1994); And, third, the OECD having grown as an educational expert in the 1970s and 1980s, has led to increasing standardisation of policy in lifelong worldwide by facilitating ‘policy transfer’ and ‘policy borrowing’ (see Steiner-Khamsi 2006, for further discussion). In short, the OECD can be seen as an effective tool for persuasion, as promoting and presenting best policy and practice while lacking any legislative ability to enforce or set policy.

The four OECD texts I decided to examine were: Promoting adult learning (2005); Beyond rhetoric: Adult learning policies and practices (2003); Re-thinking human capital (2002) and The wellbeing of nations: The role of human and social capital (2001). Given my interest in the OECD as a whole, I was interested in general or cross-country reports, rather than documents that focused on specific countries or regions. Beyond rhetoric, which presented the experiences of nine countries, was the first document of its kind dedicated to looking at practice and participation in lifelong learning. Promoting adult learning, was a follow-up to the 2003 document published two years later. These documents bring together lessons of 17 countries (OECD 2005) and are argued to provide ‘evidence’ of best practice in increasing participation in adult learning. The document Re-thinking human capital specifically caught my attention as it was a document I had found in which the OECD explicitly challenges and adds to the idea of human capital. The wellbeing of nations (2001) also signalled a move towards including the social dimension of adult and lifelong learning more overtly while still focusing on outcomes rather than inputs (which has been the tendency for much neo-liberal policy in education). Together, these four documents provide an overview of the organisation’s current position on lifelong learning in general.5

The approach taken can be characterised as critical policy analysis (Ball 1997; Ozga 2000; Taylor et al. 1997), as I have sought to make explicit the values and politics in the written result of policy. As Troya puts it, critical policy analysts are united by a conviction that ‘things need to be pulled apart’ (1994, 71). Thrupp and Tomlinson (2005) further explain that critical policy analysts critique those policies that increase inequality and maintain or intensify injustices, thereby bringing the ‘management of excluded and marginalized peoples to the fore’ (549). The aim of this project was to ‘pull apart’ policies on lifelong learning, uncover the assumptions and unpack the underlying politics and discursive effects.

Borrowing from the work of Norman Fairclough (1992, 2006) and his ideas on critical discourse analysis (CDA) I decided to focus on both textual and discursive strategies and practices around inclusion and lifelong learning. Fairclough notes that to understand how discourses come to hold power, an analysis of texts may entail looking at or for the following features: assumptions, presuppositions, implications; classifications; contradictions; dialogicality and polemic; control of the floor in interaction; evaluation in texts, value assumptions; inference; metaphor; modality; narratives – especially conversational; nomination; overstatement; certain paralinguistic features; passive voice; use of pronouns (e.g. you, we, include or exclude etc.); representation of social agents; rhetorical and persuasive features; choice of vocabulary; wordplay (Fairclough 2003). In drawing on Fairclough’s ideas on CDA I paid particular attention to the value assumptions underpinning the documents, looking specifically at the choice of words the authors made and, above all, focusing on the rhetorical and persuasive features present in the OECD texts. In this study I was interested in
examining the contradictions in and across the texts and directed my attention to answering the following questions: Who was the document directed at/who was the target audience? How did they characterise the lifelong learner? How did they conceptualise lifelong learning? Who is being excluded? Who is included? What ideas are absent? Which ideas are most dominant? And, what were some of the likely implications of the language set forth in the texts?

I was, therefore, particularly interested in examining the role and operationalisation of rhetoric, and, thus, drawing on the work of adult education scholars Edwards and Nicoll (2001; Nicoll and Edwards 2000, 2004). Through rhetoric, policies or assertions are put beyond question, naturalised and, in doing so, undermine alternative positions. In their article, ‘Researching the rhetoric of lifelong learning’, Edwards and Nicoll (2001) focus specifically on the ways language creates a sense of urgency, establishes an audience and persuades audiences by being future-directed, by focusing on past events to lend credence to their assertions, and by engaging in ‘naming and shaming’ where people and organisations are singled out to merit praise and blame.6 In my analysis of the OECD texts I pay particular attention to many of these rhetorical features.

While I do not directly address the material effects and outcomes of these OECD texts, I focus on discourse because it leads to concrete changes in the world (Fairclough 2006). The OECD, through its position as ‘éminence grise of the education policy of industrialised countries’ (Rinne, Kallo and Hokka, quoted in Rubenson forthcoming), indirectly guides national policy changes as the discourses with which it engages become ‘operationalised, implemented and put into practice’ (Fairclough 2006, 2). Discourses thus reflect a certain understanding about the world and simultaneously reinforce, and help bring about, the world envisioned through those particular discourses.

**Interrogating inclusive liberalism**

The theory of inclusive liberalism came to inform the lens I applied to examining the OECD documents I chose to analyse. However, only after having read almost an entire document (one of the four), did I become aware of the central importance inclusive liberalism played in recent OECD discourse around lifelong and adult learning. The goal of the research therefore became not only investigating where examples of Craig and Porter’s (2003) inclusive liberalism were present but also exploring and critiquing the ideas behind inclusive liberal discourse in general.

Craig and Porter (2003) developed their theory of inclusive liberalism mainly from their observations and analyses of the changes in the structure, mission and attitude of the World Bank. In their study,7 the authors noted that at around the beginning of the twenty-first century, the Bank started to promote a partnership approach – with other organisations, aid-receiving countries and the people they were trying to ‘lift out of poverty’. They also found that the emphasis on GDP, fiscal responsibility and a disciplinary ‘structural adjustment’ approach in the vein of the IMF became supplemented by discussions on collaboration, care and inclusion; inclusion not just in terms of including people as participants in the wider global economy but also in regards to the promotion of public–private partnerships and the inclusion of both the social and economic spheres. In their observations, what was occurring was not purely neo-liberalism in the sense of the promotion (or perhaps more accurately stated, imposition) of pro-market policies to root out government inefficiencies.
Rather, the mantra of ‘let the market decide’ was becoming ‘let’s consult and collaborate’ for the purpose of social inclusion and equity. While the market was still believed to play a crucial role in the provision of social services, a partnership approach between government and private industry was being promoted with increased vigour from within the Bank.

At its core, inclusive liberalism can be understood as a political doctrine that attempts to strike a balance between the welfare state and the market state. The theory shares many commonalities with sociologist Anthony Giddens’ ideas on the Third Way which was developed as a political doctrine for centre-left governments to be able to reinsert issues of social cohesion, civic participation and democracy into politics without rejecting globalisation as a whole (Giddens 1999, 2000, 2003). It is fair to conclude that many of the policies and much of the discourse in the World Bank that Porter and Craig (2004) observed could be considered characteristic of the Third Way. However, I find the idea of inclusive liberalism more useful in examining OECD texts and policies since it points to the continuation of liberalism as a guiding philosophy and the importance of inclusion in the policies – in terms of social inclusion as well as the promotion of partnerships between market, state and civil society.

Examining these key documents reveals the OECD to be endorsing an inclusively liberal agenda by promoting lifelong learning for social inclusion and economic purposes within the context of market, state and civil society partnerships. What my analysis shows, however, is that inclusive liberalism retains what Brown calls the ‘political rationality of neoliberalism’. Brown describes neo-liberalism’s political rationality as placing the entrepreneurial individual at the centre. She writes:

[people’s] moral autonomy is measured by their capacity for self-care – the ability to provide for their own needs and service their own ambitions … the individual bears full responsibility for the consequences of his or her action no matter how severe the constraints are on this action – for example, through lack of skills [and] education … (2005, 42)

Inclusive liberalism does not retain so much of neo-liberalism’s ‘market rationality’ due to its inclusion of the public sphere and the promotion of both the social and economic purposes of social policy. However, what the examination of these OECD documents shows is that the political rationality remains distinctly neo-liberal as in the manner described above by Brown.

**Inclusion in lifelong learning**

In this section I document and demonstrate the ways in which inclusive liberalism plays out in OECD discourse around lifelong learning. In particular, the documents promote an inclusive vision of the concept and purpose of adult and lifelong learning; stress the importance of incorporating a wide variety of learners; and, advance the ideas of unity, cooperation and coherence alongside those of accommodation and diversity.

**An inclusive interpretation of adult learning**

It is notable that both the description of adult learning and the purposes it serves are both inclusive and expansive. In keeping with inclusive liberal tenets, the idea of
learning is widened discursively to be more than acquisition of technical skills for the economy. In terms of a definition, *Beyond rhetoric* (OECD 2003) states:

> Adult learning, as used in this review, defines all aspects of adult education and training and all learning activities undertaken by adults … which includes personal, professional, remedial or reskilling … general, vocational and enterprise-based training within a life-long learning perspective. (3, 8)

*Promoting adult learning* (OECD 2005) adds to this list the ideas of intergenerational learning and community learning. Furthermore, all documents note the importance of including intentional informal learning and education as valuable types of adult learning. Both these reviews, however, define an adult learner as ‘an adult between 25 and 64 who has left initial education and training’ (OECD 2003, 26; 2005, 22), which calls into question the expansiveness of the idea of adult learning – a point which I address later in the paper.

There is acknowledgement of both the social and technical skills that adult learning can develop (OECD 2002), recognising that different competencies are needed for a ‘rewarding and successful life’ (122). Even human capital is reassessed in the belief that not only is there a need to add social capital to the list of purposes of lifelong learning (OECD 2001) but also that there should be a ‘wider form of human capital’ altogether (OECD 2002, 118) where human capital is recognised for its contribution to economic growth and social development.

What is perhaps most evident as a commitment to an encompassing vision of lifelong learning is the purposeful attempt to bring together both the social and economic rationales for adult learning to help ‘bridge the gap between those who emphasise education’s economic mission and those who emphasise broader social and personal benefits’ (OECD 2002, 119). The documents assert that there are both ‘economic and non-economic’ reasons for learning (OECD 2003, 2005) with ‘economic, social and/or personal rewards’ (OECD 2005, 33). There is room for both ‘efficiency and equity’ (OECD 2005, 104; OECD 2003, 153). As *Beyond rhetoric* makes clear, engaging in learning ‘for private, social and/or recreational purposes or for reasons not directly related to work is an important facet of lifelong learning’ (OECD 2003, 25). The documents state that education prepares people ‘for life as well as work’ (OECD 2002, 119) and can ‘facilitate the creation of personal, social and economic well-being’ (OECD 2001).

Specific benefits of learning cited by the OECD include ‘make[ing] humans more efficient workers as well as better-informed citizens’ (2002, 26), increased productivity, job satisfaction, community participation, economic growth, a reduction in unemployment, better health, social development (OECD 2001, 2002, 2003), and the ‘development of democratic values and improvement of skills to participate in the economy’ (OECD 2003, 10). Reminiscent of earlier UNESCO publications that underscored the importance of ‘learning to be’ and ‘learning to live together’ alongside ‘learning to know’ and ‘learning to do’ (Delors 1996), *Beyond rhetoric* notes that ‘learning is related to citizenship, democracy and general well-being’ (OECD 2003, 25), and can act as a redistribution of wealth. Moreover, the report claims, learning can address skill shortages, lower crime rates, advance social cohesion, and ‘even make for a better society’ (69). These OECD reports, then, can be likened to Giddens’ (2003) promotion of training and education as a way to further social cohesion. However, it is individual ‘learning’ rather than broad based educational policy that is
being entrusted by the OECD with the job of helping to ease the integration of individuals into a knowledge-economy and society.

**Cooperation and integration**

Cooperation and integration, which are fundamental components of inclusive liberalism, manifest themselves in the descriptions of the ways in which adult learning should ideally be delivered: in a coordinated, integrated system built on partnerships and cooperation. Inclusion and agreement are urged from all parties who are, in turn, invited to participate. There are petitions for coordinated policy (OECD 2003), ‘integrated policy frameworks’ (13), ‘a coherent and transparent system’ (34), ‘a systemic approach’ (13) in the fight against fragmentation, decentralisation (OECD 2005) and incoherence (109). The goal is to realise a holistic vision built on partnerships and cooperation (75).

Indeed, partnerships, cooperation and collaboration are considered crucial between: government and social partners; universities and outside institutions; firms, unions and training institutions; ministries of education and labour; policy and training environments; adult learning and social welfare programmes and across and among institutions in general (OECD 2003, 2005). Different parties are urged to partner up so to work towards a common goal. The OECD (2005) professes that it no longer views adult learning as a teacher-centred endeavour, with one or more teachers on one side and learners on the other, but rather as a joint venture where there is unity towards a common objective. *Promoting adult learning* calls on educational providers to work cooperatively not competitively since all programmes are aimed at ‘upskilling individuals for a better life and better performance in the labour market’ (OECD 2005, 80). There is often assumed consensus with statements like ‘all ministers recognise the importance of lifelong learning opportunities for all, [supporting] lifelong learning for all as a guiding principle’ (16, 71). As is common in inclusive liberal discourse, the role of government is re-acknowledged with talk of governments addressing market failures (233) and admissions that the ‘market alone has not been able to meet the wide range of complex needs’ (27).

**Accommodating to the needs of all learners**

Not only are providers of adult education and training called to be included and incorporated into the system, so too are all potential learners. The documents expressly state that programmes need to ‘accommodate all learners’ (OECD 2003, 60) and expand to meet learner-needs (75). For this to occur, it is argued that there must be a more comprehensive approach and that learning become ‘broadly accessible for all persons of working age’ (16); in other words, everyone – of working age, at least – is a potential learner (OECD 2002).

While all adults are encouraged to participate, the documents focus on the currently ‘un-included’, calling for elimination of barriers, removal of constraints and the minimisation of obstacles (OECD 2003, 181). Those most ‘in-need’ are identified as the over 50s, those with low-education, the ‘low-skilled’, immigrants, those with the lowest literacy, the long-term unemployed, workers in SMEs (small and medium enterprises) and in blue collar occupations, Aboriginal people, the ‘handicapped’ and rural or remote dwellers (OECD 2001, 2003, 2005).
The ways to expand participation, according to these OECD reports and reviews, are to place the individual at the centre. While all adults might be potential learners, their individual learning needs and styles are to be taken into consideration. The OECD puts forward the idea of tailor-made, learner-centred programmes (OECD 2003, 199) and encouraging participation through ‘tailoring incentives’ (69). Mention is made of ‘individualised pace’, ‘individualised programmes of study’ (80), ‘individual counselling’ (OECD 2005), ‘individualised skill profiles’ (OECD 2003, 80), ‘individual pathways’ (OECD 2003, 106) and the importance of agency and autonomy for learners to ‘create their own learning project’ (OECD 2003, 106). Even funding is to be tailored and individualised with talk of ‘individual learning accounts’, targeted ‘learning vouchers’ and individual subsidies (2003, 2005).

As is stated in Beyond rhetoric, the ‘first objective must be to give the individual greater autonomy in achieving the goals defined’ (OECD 2003, 176). According to Promoting adult learning (2005), pedagogical methods are to be focussed on the learner with instructors and programmes keeping in mind personality, style, expectations, motives, as well as overall wellbeing of each individual learner. Evoking Freirean pedagogical beliefs and diatribes against the ‘banking method’ of education (see Freire 1997), these documents call for the ‘transformation of the individual rather than the regurgitation of information’ (OECD 2003, 163) and the importance of context.

One of the prime methods the OECD believes will expand learning opportunities and draw in current non-learners is through flexibility. Flexibility, considered a crucial element of the knowledge-economy and endorsed in neo-liberal as well as more inclusive liberal policies, is stressed in all the reports. As the OECD explains, learners with a flexible timetable can work training and education into their schedule so not to interfere with their jobs, combining both work and study (OECD 2001). The documents stress ‘flexible working hours’ (11), ‘flexible learning arrangements’ (OECD 2005, 75), transferable learning and programmes and greater choice (55). Adult learning, like the economy itself, appears to be becoming more individualised and flexible; in fact, the shift from education to learning constitutes an example of this individualising process. Yet targeting and individualising do not necessarily mean more money allotted to adult learning: ‘policy interventions must be targeted either to reduce the direct or indirect costs of full-time studying or to provide flexible scheduling arrangement’ (OECD 2005, 83). In other words, increased focus or attention does not translate into increased funding.

**The good and worthy citizen and the call to conversion**

This second part of the document analysis attempts to delve deeper into the relationship between lifelong learning and inclusive liberalism in the OECD. What is revealed by examining these texts is that the notion of inclusion is intrinsically linked to the notion of a good citizen. On the surface, the flexible, autonomous learner included in an expansive system of lifelong learning may appear an apolitical ideal premised on the ideas of inclusion and acceptance. However, underpinning the appeals to inclusiveness and inclusion is the envisioning of a ‘good citizen’ fashioned through and in lifelong learning. In contrast to this good and worthy citizen there exists, then, the unworthy citizen, who is to be found in the non-participant in lifelong learning. Religious metaphor helps reinforce the notion of worth in the ‘call to conversion’ to lifelong learning.
Describing the good citizen

Who is a good citizen, then, according to the OECD? The descriptions of the outcomes and role of lifelong learning provide us a glimpse into what can be considered an inclusive liberal conception of a good citizen. According to Re-thinking human capital (OECD 2002), a good citizen is compassionate, understands democracy and has skills that relate directly to improving firm and country productivity, ‘managing his [sic] own productive capabilities … [and] learning activity’ (122–4). Furthermore, they have ‘better decision-making skills’, an awareness of opportunities (128) and are ‘conscientious, extroverted and agreeable’ (123). An active citizen is one who not only helps themselves but also society as a whole. As The wellbeing of nations points out, there is a direct correlation between education and ‘a reduced risk of smoking, better well-being, lower criminal involvement and higher participation in community groups’ (OECD 2001, 125).

What is interesting in all four OECD documents is the centrality of the individual, who, on the one hand, is championed in terms of their ‘rights’ and ‘autonomy’, and on the other is singled out for their responsibilities. The favouring of the word ‘learning’ over ‘education’ suggests that it is the individual alone who must take initiative and hold themselves responsible. Education connotes institutional structures, state responsibility and teachers who are also involved in the process of learning. Akin to the enterprising, entrepreneurial self in the neo-liberal state – as characterised by Rose (1999) – the good citizen in the inclusive liberal state is a lifelong learner who appears to be individualistic, middle-class and willing to take up the role with which society has entrusted them; they are well-behaved, blend in rather than stand out and are actively committed to the goals of the state.

The worthy (Protestant) citizen

The good citizen demonstrates their worth through what can be thought of as a re-imagined secularised liberal Protestant work ethic. They are highly motivated to learn and to succeed as a ‘future-directed individual’ (OECD 2002, 124). Not only are they applied and committed to their learning for the potential returns but they are also willing to sacrifice and engage in ‘self-discipline’ for future rewards down the track (125). This commitment to hard work and ‘delayed gratification’ reflects decidedly Calvinist values. As Weber notes in his seminal work The Protestant work ethic and the spirit of capitalism, the God of Calvinism demands of believers ‘not single good works, but a life of good works combined into a unified system’ (Weber 1958, 117). Similarly, the OECD does not consider learning to be a one-off activity, but a lifelong process to which the individual should be committed. Furthermore, lifelong learning is viewed as contributing to the possibility of greater compensation later in life, like Protestants engaging in self-discipline on earth in order to reap rewards in the afterlife. In following this line of reasoning, not engaging in learning reflects a lack of self-discipline and idleness. As Weber explains, ‘loss of time through sociability, idle talk, luxury, even more sleep than is necessary for health, six to at most eight hours, is worthy of absolute moral condemnation’ (Weber 1958, 158). In certain strands of Protestantism, Weber writes, ‘the perseverance of the individual in the place and within the limits which God has assigned to him [sic] was a religious duty’ (Weber 1958, 160). Likewise, learning, like working, is viewed as not only a morally acceptable activity but also an ethical obligation. However, unlike the earlier OECD report Education and the economy in a changing society (OECD 1989) which primarily...
viewed education as a necessity to help strengthen a country’s economy, in these four documents (OECD 2001, 2002, 2003, 2005) individualised lifelong learning is lauded as a morally good way to spend one’s time as it demonstrates and strengthens an individual’s commitment to society as a whole, as well as to the economy.

The converted lifelong learner reaps the reward of their labour as they are caught in a ‘virtuous circle of learning’ (OECD 2002, 2003, 2005), receiving (in the form of money, prestige and power) and learning. As all the documents observe, the *Matthew effect* is very much in play: ‘For to everyone who has, more shall be given, and he will have abundance; but from the one who does not have, even what he does have shall be taken away’.10 What is made clear is that it is not the ‘meek who will inherit the earth’11 but rather that the individual who actively seeks out, and participates in, lifelong learning will go on receiving which will then lead to them receiving more as they demonstrate their worth to their firm and country. In the context of lifelong learning, the Matthew effect refers both to the fact that the ‘rich get richer’ and, conversely, that those who fail to utilise, or build on, the talents they have will be excluded from ‘getting’. Inclusion is also presented as the idea of an ‘inner circle’ to which the lifelong learner belongs and from which non-participants in lifelong learning are excluded.

*Justifying the worth of the good citizen*

In the discourse of lifelong learning informed by inclusive liberalism, as exemplified by the OECD, lifelong learners are seen as deserving. Furthermore, inequality – in economic, social and cultural capitals – is explained and justified by what Bourdieu (1998) describes as a *sociodicy* of competence. Instead of a *theodicy* (Weber 1968) where we seek theological justification for why there is evil in the world, under globalisation (more specifically free-market capitalism) we now understand the world in terms of a *sociodicy*, looking for a sociological justification for poverty and inequality as well as for privilege and position in society. In his book on the hegemony of neo-liberal globalisation, Bourdieu explains (1998) that competence has come to form the *sociodicy* of globalisation, a concept which is very much evident in these OECD reports. Competence, he argues, is what justifies one’s privilege over another’s poverty. It provides a justification for why the lifelong learner continues to reap rewards, earn more, and is generally more valued in society. Under inclusive liberalism, competence becomes framed as cognitive as well as social or cultural. Without technical or intellectual capacity and ‘skills’ there is limited opportunity for employment; without social competence, there is also both economic and social exclusion. Learning is seen as leading to competence, which then demonstrates one’s worth as a citizen, which will *then* lead to an individual’s inclusion in society. In addition, learning begets further inclusion which begets further learning and so forth.

The question remains, however, as to what separates the good and active citizen, who has realised their desire and duty to undertake adult learning, from the excluded non-participant? What helps bolster the idea of lifelong learning and competence as sociodicy? The missing influences in the non-participants in lifelong learning, we are told, are ‘motivation and personal characteristics’ (OECD 2002, 122). Under the *personal characteristics* category, there are a number of attributes that non-participants ostensibly lack, such as ‘the capacity to develop, manage, and deploy one’s own competencies … for example, by investing in further learning, and developing facets
of one’s character that enhance one’s effectiveness at work’ (119). The documents also inform us that the so-called unsuccessful can be ‘neurotic’ (OECD 2001).

The reasons cited for non-participation in lifelong learning are all individualised. The OECD notes that people are ‘not interested’ (OECD 2005, 28) or that ‘they are not aware of their need’ (30). The document explains that whereas ‘highly educated people are already convinced of the benefits of learning’ (34), the low-skilled ‘refuse to acknowledge their need [for learning, and] overestimate their ability’ (107–9). The documents claim that low-skilled, non-participants are ‘complacent’ and do not address their need to learn. Religious imagery is used to describe the difference between the two groups. Harkening back once more to the influence of Protestant values in inclusive liberal discourse surrounding lifelong learning, there is actual talk of ‘converts’ (OECD 2003, 2005) and those who have yet to see the light. Yet, the OECD reports offer up a possibility for redemption by believers ‘convey[ing] to sceptical adults how skills can open the door to their world’ (OECD 2003, 175), and convince them ‘of the value of learning’ (194). It is as though through learning the state assumes the role of God, by ‘helping those who help themselves’. In true liberal Protestant form, we are told the working poor are missing out and that learning should not be for ‘just the most favoured individuals or the most disadvantaged but to all those who seek it’ (168).

Creating the good citizen
A central theme in the OECD discourse around lifelong learning and the ‘good citizen’ is the inclusive liberal focus on including non-participants through ideals and tactics of ‘activation’. The documents make clear that a principal goal of the lifelong learning project is to incorporate those currently excluded from learning opportunities and the riches they bring. Numerous so-called ‘dedicated’ and ‘committed’ institutions are implicated in this mission: colleges, universities, folk high schools,12 study circles, popular universities, community-based organisations, unions, social partners and the voluntary sector in general (OECD 2003, 2005). One way to jump-start the non-active, according to Beyond rhetoric (2003), is by encouraging motivational characteristics perceptible in successful learners, or to ‘activate motivation’ so that the low-skilled become ‘willing to be educated’ (OECD 2003, 116). One proposed solution to non-motivation, and thus non-inclusion, is through affirmation: by recognising prior learning, giving credit, validation of personal experience or certification which can coax people back to learning (OECD 2001, 2003, 2005). Organisations and individuals reading these OECD reports are implored to reach out and try to include the excluded through such things as awareness programmes, mentor or ambassador programmes or general ‘dissemination of information’ (OECD 2005, 40, 47).

However, beyond proselytisation by individuals and organisations, the state is also called to be involved by instituting ‘activation policies’ that call for the so-called ‘activation’ of people on benefits (OECD 2005). This neo-liberal solution advanced by the OECD is said to come in response to concerns put forth in OECD countries that there are individuals ‘passively’ receiving money. Instead of idly receiving money for doing nothing – which, in the Protestant ethic frame illustrates one’s proclivity to ‘waste time’ and thus demonstrates a lack of merit or desert – the OECD argues that individuals’ financial support should be contingent on ‘enrolling in training and education programmes’ (OECD 2005, 73). Such activation measures are, therefore, generally forced. It is, thus, a conversion process whereby people are either strongly encouraged
to participate in learning, and where that fails, are subjected to a ‘forced conversion’ where they must swallow the bitter medicine of learning and training for society in general and for the sake of their soul.

In sum, non-participation in adult learning is considered non-inclusion and, accordingly, can be seen as tantamount to non-citizenship; conversely, active learning begets active employment begets active citizenship (OECD 2003). Yet learning is not necessarily considered a privilege or an option reserved for the few but rather ‘like voting, [learning] is a duty as much as a right’ (124). Being an active learner, then, is a prerequisite to being successful and included in a democratic society. Opting out of learning is thus likened to opting out of society.

Discussion: re-examining inclusion, inclusive liberalism and lifelong learning in the OECD

Limited inclusion?

The language in these policy texts suggests that, in some senses, the OECD has taken up the issue of inclusion through and in lifelong learning with vigour. In some ways, the OECD’s is a promotion of ‘no adult left behind’. These documents on lifelong and adult learning call for the integration of non-participants or the ‘left-out’. They also promote an inclusive interpretation of the role of lifelong learning and the need to embrace all parties involved with the delivery of it. Yet while the OECD can be seen as extending its agenda beyond its previous main concern with ‘education and the economy’ (OECD 1989), education for employment and work clearly remains the overarching perceived purpose of lifelong learning, despite references to the wider social good. It is made clear that the first thematic review on adult learning was created ‘with special emphasis on improving employability in the labour market’ (OECD 2003, 3). Statements about progress through learning can be primarily understood as urgings to progress either towards a job in and of itself or towards a better paying one. Furthermore, while there are numerous explicit acknowledgements about informal learning, this idea is not explored or even adequately defined and all examples of successful learning centre on participating in formal programmes or in very structured informal learning for or in the workplace. What lends support to the idea that the economy is positioned over society is the fact that an adult learner is solely defined as an adult between 25 and 64, confirming that adults who can no longer officially participate in the economy are not particularly worth discussing.

There are also broader critiques to be made of the ‘deficit model’ of education and learning put forward by the OECD in its formulation of a good citizen. It is dubious whether more learning is as essential as it is claimed. Since the results of the OECD-sponsored Adult Literacy and Lifeskills Survey (ALL) in 2003, Canadians have been repeatedly informed that around 50% of them lack sufficient skills to be able to function in society (OECD and Statistics Canada 2005). This high figure raises questions on what it means to be a functioning and competent citizen in society. Do people truly require the constant upgrading and learning prescribed for them by governments or policy think-tanks like the OECD? (see Livingstone 1998). In his study of non-participants in adult learning, Swedish scholar, Sam Paldanius (2007), found that non-participation in certain adult learning programmes was often a very rational response. In his interviews he discovered that these nominally low-skilled adults felt they were coping OK with the skills they had within the context they were in. As Paldanius’ study points out, converts to lifelong learning and adult education instructors promote adult learning as
a one-size-fits-all sweater which feels good for them, so therefore they believe it will fit all current so-called non-participants. Yet, how can people be convinced that their new skills will truly change their lives? Moreover, what Paldanius ultimately found is that there was no such person as a non-participant in lifelong learning; every one of the nearly 40 people he interviewed engaged in learning, and often not just superficially, about things they thought were important and of interest to them, such as fixing a car, gardening or perfecting a particular hobby. Workplace learning or formal schooling were what they were rejecting, not learning per se. Illeris puts it best when he writes:

the majority of participants enter the programmes [adult basic education] because they are more or less forced to do so, and not because of an inner drive or interest. In practice, they typically develop a variety of psychological defence strategies to avoid learning that challenges their identity and personal ways of thinking, reacting and behaving. In general, it seems to be basically characteristic of adult learning that: adults have very little inclination to really learn something they do not perceive as meaningful for their own life goals; adults in their learning draw on the resources they have; and adults take as much responsibility for their learning as they want to take (if they are allowed to do so). These characteristics are significantly different from general assumptions behind most educational programmes. (2003, 19)

Certainly, adult learning offers prospects of further inclusion which may come as a result of learners participating in various programmes. Golding (2008), for example, writes about ‘men’s sheds’ in Australia, which are places that offer informal learning opportunities and programmes providing ‘mateship, friendship and a sense of belonging through positive and therapeutic informal activities and experiences with other men’ (20). These programmes, which generally attract unemployed and retired men, do lead to feelings of greater inclusion and social cohesion. However, they do not necessarily lead directly to a job or a higher GDP for Australia. In contrast, what can be said about the OECD’s valorising of compulsory formal education for a job (that may not exist) over informal education that centres on a learner’s perceived need and interest is that greater exclusion, rather than inclusion, may be the end result.

Inclusion as a realisable goal?

In critically examining these OECD documents on lifelong and adult learning, a nagging question emerges: Is their focus on inclusion nothing more than rhetoric? Is the OECD 2003 report Beyond rhetoric, then, nothing more than an ironic title masking an entire report of rhetoric? It is possible to interpret these documents as a deliberate ploy by the club of the (generally) rich nations to manipulate citizens of their respective countries to fulfil their role to the neo-liberal state. This, of course, calls into question inclusive liberalism and Third Way politics as merely making neo-liberalism more palatable to consumers through emphasising the redemptive power of learning.

In the face of continuing, and indeed increasing, economic and social inequalities and educational opportunities in OECD countries, it is easy to dismiss the OECD’s purported concern with learning and inclusion as calculating wordplay. There is undoubtedly an element of posturing and persuasion in these policy documents. However, it is too simplistic to discount this focus as insincere or to retort with the comment that the OECD is purely promoting learning for a higher economic agenda – especially given its mandate to promote economic development. It is reasonable to believe that many in the OECD, and in the governments of its member-countries, are
probably ‘true believers’ in the power of education and learning to address economic and social ills. Nonetheless, it is not clear that education and learning can deliver redemption in the ways proclaimed by the OECD documents. What becomes increasingly apparent through reading these recent reports is that lifelong learning itself and the institutions that offer adult education have been entrusted with the daunting task of including individuals in society and combating social exclusion plus a wide range of social and economic problems. Noted in The wellbeing of nations (OECD 2001), adults who are unable to read are of particular concern ‘as they risk … social exclusion in a knowledge-based society’ (45). Yet as Rubenson (2005) explains, literacy and learning in many OECD countries are promoted in lieu of holistic social policy. Life-long learning has come to the fore against the backdrop of a waning welfare state. It is the social policy that fills the void left by those other social policies which remain somewhat of a bygone from the welfare state era.

This above critique calls into question inclusive liberalism’s goals more broadly, which include striking a balance between a market and welfare society. Can inclusion through learning truly be a realisable goal when many of the neo-liberal policies are kept intact? Can individuals brush up on their learning when educational institutions are suffering from cut-backs in government spending? Do public–private partnerships, involving the state and market and community groups, truly give equal weighting to all parties or does the corporate partner’s need and desire for profits conflict with the wider goals of social inclusion? Although a harsh assessment of these reports – which are, on the one hand, somewhat progressive – citizens are being urged to take care of themselves by learning, as the state can no longer afford to do so. What can be thought of as the ‘elephant in the room’ in these OECD reports is conversation around poverty and social economic status and the specific welfare policy outside of learning that may be able to address what is becoming a chasm between the haves and have-nots.

**Conclusion**

Craig and Porter (2003) have contended that one way of thinking about the changes that have been occurring in public policy is through the concept of inclusive liberalism. In their studies, they showed both how ideological differences are being bridged in calls for ‘unity and inclusivity’ and also how the policy discourse itself focuses on including the uninccluded. We can see this discourse playing out in recent OECD reports on adult and lifelong learning. Nonetheless, scratching beneath the surface of declarations of balance and equal concern for both the economy as well as society reveals a continued bias in favour of educating for employment, productivity and wealth. What is more, lying beneath allusions to inclusion is a very particular liberal and individualised conception of a worthy citizen, who is to be created through life-long learning. The political rationality of neo-liberalism appears to have remained intact through the promotion of self-management and active citizenship through life-long learning; being a participant or included appears, then, to be mostly promoted as a moral obligation rather than as an opportunity.

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Notes

1. The OECD currently has 30 members. While the OECD was – and still is – generally thought of as a ‘rich countries’ club’, the inclusion of Mexico, Turkey, Poland, Hungary and Slovakia challenges this description.

2. While ‘lifelong learning’ strictly refers to the learning that takes place throughout the course of one’s life, the OECD’s discussion on lifelong learning in the context of the documents analysed for this study exclusively focuses on adult learning, training and education. It is important to further note that lifelong learning in general is often treated synonymously with adult learning.

3. Gross Domestic Product is one of the most common measures of the size of a country’s economy, taken (generally) on an annual basis. The final value of all goods and services produced within a year is assessed, taking into account consumption, investment, government spending and exports minus imports.

4. I understand ‘discourse’ to be a bounded way of talking about a subject, which involves using certain phrases, words and ideas to promote a certain understanding of that subject. Underlying discourses are theories and assumptions. I draw on Gee, Hull, and Lankshear’s description of discourses, as creating social positions ‘from which people are invited (summoned) to speak, listen, act, read, write, think, feel, believe and value in certain characteristic, historically recognisable ways, in combination with their own individual style and creativity’ (1996, 10).

5. Note also that since the research was conducted at the beginning of 2007, no OECD documents published after 2006 were consulted.

6. Edwards and Nicoll (2001) draw on the three elements of rhetoric, in accordance with Aristotle’s ideas, which are exigence, audience and persuasive genres. Exigence is the way language creates a sense of urgency (by, for example, using definitive language, present and future tenses, or establishing an imperative; a threat etc.). Audience is the way in which the text establishes who it is actually addressing and how the audience is created (through, for example, the implied use of we – placing government outside the public or the citizens etc.). The persuasive discourse has three subsets: (1) deliberative, which is how policy may persuade audiences by being future-oriented and speculative; (2) forensic – by focusing on past events to provide accounts that what they are saying is true; and (3) epideictic, whereby policy engages, in what they term, ‘naming and shaming’, meaning that people, organisations and events are portrayed in policy text as meriting praise or blame (106).

7. This study of the World Bank draws in large part from Doug Porter’s personal experiences with the Bank in his role at the Asian Development Bank, which is mandated with fighting poverty in Asia and the Pacific.

8. While neo-liberal policies are sometimes referred to as laissez-faire policies there is ample evidence that governments never adopt a ‘let the market decide’ hands-off attitude but rather actively engage with the market to ensure market reforms take hold (see Klein 2007).

9. Informal learning in this context refers to intentional learning for which no credential is earned, including short courses, attending a seminar or reading a manual. ‘Incidental learning’ is sometimes described as informal learning but the former term describes learning that occurs for which there is no intention; it happens by accident. The OECD generally focuses on the intentional form of informal learning, which is also referred to by some as including or comprising ‘non-formal learning’.

10. This verse is taken from the Gospel of Matthew, Chapter 25 verse 29, and is often used to refer to the idea that the ‘rich get richer’.

11. This verse appears in Psalms 37:11 and also in Matthew 5:5.

12. Started in Denmark in the 1700s, Folk high schools are common in the Nordic countries and Germany. They are non-degree-granting adult education schools.

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