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International organisations and policy diffusion: the global norm of lifelong learning

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This article analyses the role of international organisations in global policy diffusion, drawing on the example of lifelong learning, a currently widely appreciated concept in education policy. I explain this success based on a sociological institutionalist framework, arguing that lifelong learning has become a global norm in education policy. For this purpose, I conduct a quantitative study of 99 countries from 1996 to 2004, showing how the idea of lifelong learning has been disseminated by international organisations and how states have reacted to this development. I first outline the theoretical framework, highlighting in particular the crucial role of international organisations. In a further step, I present the data and methods. In the third part, I analyse the activities of several international organisations on lifelong learning. In the fourth step, I show how lifelong learning has spread, distinguishing the idea of lifelong learning and reforms linked to it. Fifth, as the quantitative analysis shows, international organisations like the Organization for Economic Cooperation and Development and the European Union can explain a large part of dissemination when it comes to the idea of lifelong learning, but reforms are more dependent on national preconditions like the wealth of a country. In the conclusions, I sum up the article's main findings and outline further research areas linked to global diffusion processes.
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> Neither 'lifelong education' nor 'lifelong learning' … are specifically mentioned by the Universal Declaration of Human Rights or by any of the international treaties relating to education that have been adopted since then. … If 'lifelong education' and 'lifelong learning' are nevertheless widely considered to be rooted in the declaration, it has probably been because the first principle of Article 26, 'Everyone has the right to education', is interpreted to apply throughout life. (UNESCO 2000: 54–55)

This article deals with the question how this interpretation of 'education throughout life' had been established across countries. Research in international relations has frequently identified international organisations as sources for national political change (Finnemore 1993, 1996; Finnemore and Sikkink 1999). Constructivist theorising, more specifically sociological institutionalism, has repeatedly underlined the importance of international society and international organisations for the diffusion of global policies and values (Meyer *et al.* 1997a; Boli and Thomas 1999; Meyer 2000; Simmons *et al.* 2008b: 31–40). In line with these arguments, this article analyses the role of international organisations in the diffusion of lifelong learning, a concept currently prominent in education policy. I argue that the principle of lifelong learning has become a global norm in education policy so that its adoption is not only a functional necessity in the age of a knowledge-based society, but also fostered by reasons of legitimacy.

To analyse this process, I first outline the theoretical framework of sociological institutionalism, leading to three hypotheses linked to lifelong learning diffusion. Then I present the data and methods for this inquiry. In an additional section, I show how international organisations have promoted lifelong learning intensively, in particular the United National Educational, Scientific and Cultural Organization (UNESCO), the Organization for Economic Cooperation and Development (OECD) and the European Union (EU). Afterwards, I illustrate the spread of lifelong learning, distinguishing the idea of lifelong learning and reforms linked to it. In the fifth part, I assess the influence of the organisations quantitatively and summarise the findings with a view to the initial hypotheses. In the last part, I present the main conclusions and give an outlook to further studying of global policy diffusion.

Before starting the detailed analysis, a short introduction to lifelong learning is instructive, since case studies of education are still seldom in international relations. Basically, three different dimensions of lifelong learning can be distinguished: First, being an educational concept, lifelong learning underlines the importance of 'learning to learn' — to be able to continuously acquire new ideas, competencies or skills (Smith 1996: 418). Second, lifelong learning is a biographical experience that can be traced across an individual's life (Tuijnman 1989). Third, and decisively for this article, it is an issue in education policy. As such, it is subject of political debates, for example over how to stimulate individual learning or which pedagogical concepts to implement (e.g. OECD 1996). In this article, this political dimension of lifelong learning is investigated; it is defined as the political aim to expand education over the life-span. Over the last decades, education has continuously expanded both in numbers of students and in duration; these expansions partly overlap with lifelong learning reforms. The turn to lifelong learning has given new impetus to linking

different educational stages and to perceiving individuals' need for ongoing learning.

Reviewing the history of lifelong learning, a global emphasis on adult education and lifelong learning could first be observed in the 1960s, mainly in the context of the UNESCO and OECD (UNESCO 1972; Papadopoulos 1994: 112–13; Sutton 1996: 28). The International Labor Organization (ILO) also dealt with the issue, in particular by setting up the paid educational leave standard (ILO 1974; Salt and Bowland 1996). However, the debate had not caused major changes in national education systems (Kallen 1979: 50), which sharply distinguished the situation from today: Governments now widely appreciate this idea and try to incorporate it in national education policy development (e.g. Papadopoulos 2002; Schuller *et al*. 2002). From a policy perspective, the current debate on lifelong learning differs from earlier proposals in several ways. Today's emphasis is much more on learning than on education, which also means that the role of the state and in particular the financing of lifelong learning has been shifted from a governmental to a more private responsibility. The ongoing debate is also very functionalistic, so that lifelong learning today is often narrowed down to its economic potential (Kallen 2002), while in the 1970s, the discussions were concerned with the right to education and self-development. Furthermore, discussions nowadays integrate all educational stages from early age to later life, while the earlier debate focused exclusively on adult education. As a last difference, lifelong learning today often integrates several forms of learning, ranging from a more formal setting to more informal learning processes (e.g. EU Commission 2000: 8–9).

Given the numerous facets of lifelong learning across time and in different contexts, a strict definition of it is necessary to assess its spread empirically. In this article, I will analyse three different educational stages linked to lifelong learning policies: pre-primary education, adult education and higher education. By doing so, I operationalise lifelong learning as the systematic expansion of education over the individual life-course, more specifically as educational phases beyond schooling. Although schooling times have also been prolonged, schooling represents a common and traditional way of ensuring a learning process. In contrast, lifelong learning policies are a governmental way to implement additional educational phases across the life of individuals.

It is not obvious why states throughout the world should show a growing interest in expanding education over the life-span, so the next section will present the frameworks of sociological institutionalism. In its sociological origin, this constructivist account in international relations theory also includes a strong emphasis on education as a central institution of modern societies. In this combination, the approach delivers a clear hypothesis on why lifelong learning has become a central issue in education policies worldwide.

The theoretical background: world society and world culture

Sociological institutionalism basically conceives of world politics as being based on a shared world culture and exposing an organisational structure that causes the dissemination of policy ideas across countries (e.g. Meyer *et al.* 1997a, b). This means that states are increasingly relying on the same principles and values, and that the structure of the world society, its international exchange and the existence of global forums support the dissemination of these principles. In the context of lifelong learning, three strands of arguments are particularly important: world culture and the role of education; activities of international organisations; and the decoupling of wording and practice.

The idea of world culture is based on findings in organisational sociology. Researchers found that organisations, for example firms, are occasionally structured not according to functional logic but according to the principles that appear to be the most legitimate (Meyer and Rowan 1977; DiMaggio and Powell 1983). Transferring this idea to the world of states, sociological institutionalism assumes that legitimacy also plays a crucial role in international relations. States, thus, are considered to appear more legitimate if they feature the same characteristics as other states, for example a national constitution, an education system, a democratic order or the entitlement of individual rights (Meyer *et al.* 1997a). From this perspective, the diffusion of values, ideas and policies is thus not caused by, for example, a common economic development that states would face and that, in turn, would lead to the establishment of certain school curricula or environmental standards (Meyer *et al.* 1992; Meyer 2005). Instead, these phenomena are explained by the idea of a commonly shared world culture — a world society in which states participate while they are embedded in international exchange.

While institutionalists have assessed various examples of diffusion processes, education has been identified as a particularly wide-shared and central societal institution: Education systems have become increasingly similar across countries and contain many standardised procedures, beginning with classroom teaching but going far beyond (Meyer and Ramirez 2003). Mass schooling and common curricula are disseminated across the world (Fuller and Rubinson 1992; Meyer *et al.* 1992). University systems have been established and identified as important elements of national development (Ramirez and Riddle 1991). In education, schooling is successively introduced all over the world, and school curricula often follow the logic of universalism and are detached from local circumstances. Over time and space, the value of education has been acknowledged widely and has become taken for granted. At the same time, educational targets have been pursued across countries in an increasingly similar way. Moreover, education is also closely linked to other central ideas in

society, such as individual and collective progress, which heavily support its wide and unanimous spread.

International organisations are key actors in disseminating these world cultural ideas and policies. For example, despite being a 'hard instrument', a conference can nonetheless influence national policy development, and UN meetings have been a ritual in disseminating world cultural perspectives to countries (Lechner and Boli 2005: 81–109). International organisations also have other means at hand to disseminate policies, for example by coordination in common forums, by technical assistance or project financing (Jakobi 2009b). By all these means, they give incentives for a specific national policy development. Besides these governmental organisations, sociological institutionalism conceives of non-governmental organisations (NGOs) as a central driving force for establishing and enforcing world cultural models (Boli and Thomas 1997). As research in political science has shown, they have promoted human rights, environmental concerns and other issues (e.g. Finnemore and Sikkink 1999; Risse *et al*. 1999). With regard to education, NGOs can be providers of education, participants of international conferences or lobbyists with regard to national education policy, depending on the scope and size of the organisation. In the case of both governmental and NGOs, nation states are influenced by world cultural principles, ideas and policies that are disseminated on the global level and that are likely to cause national policy change. With a view to lifelong learning, the establishment of these wide-ranging international activities results in the following hypothesis: *The diffusion of lifelong learning is caused by world societal activities, more specifically international organisations, both governmental and non-governmental*.

The normative force of world society, however, also produces some pathologies, in particular a discrepancy between official statements and corresponding activities. Norm adaption, thus, is not identical with norm internalisation (Finnemore and Sikkink 1999). A prominent example of this difference is the human rights regime, where states officially agree on the value of human rights, but nonetheless violate them in daily practice. Sociological institutionalists call this difference 'decoupling', or have referred to 'talk versus action' (Brunsson 1989; Meyer 2000: 244). Applying this distinction to the case of lifelong learning assumes a difference between the diffusion of the idea and its realisation, and results in the following hypothesis: *States differ in whether they promote the idea of lifelong learning or whether they introduce reforms linked to it*.

However, as a third important aspect, world society constitutes only one potential source of policy diffusion, and critical readers would draw attention to internal conditions (Berry and Berry 2007), or 'independent problem-solving' (Knill 2005) as a further cause of finding similar policies in different countries. From this perspective, countries follow a rational logic and adopt

policies that seem to be most promising. Indeed, lifelong learning is not only the subject of international promotion and norm development, but is also an important policy linked to current developments in national economies and societies: One argument in this context is that new needs are linked to new forms of work in a knowledge-based economy (Hasan 1996: 36). From this perspective, lifelong learning is linked to economic and societal transformation, and is caused by the emergence of a knowledge society — a special type of society first conceptualised in the late 1960s by Ferdinand Drucker and later by Daniel Bell (Drucker 1969; Bell 1973/1999). With the concept of a knowledge economy, these authors established an important rationale for education policymaking, since education plays a major role in integrating people in the state-of-the-art of their professions and beyond. Political consequences derived from such an approach are, for example, increased adult learning for updating knowledge or more higher education to master the challenges of complex knowledge. The idea of a knowledge society and the corresponding need for reforming education are common sense in politics today, as the EU shows as it strives to become 'the most competitive knowledge-based economy of the world' (European Council 2000). Drawing on this more functionalist perspective, we can derive a very different hypothesis linked to lifelong learning: *The diffusion of lifelong learning is caused by the adoption of functionally adequate policies through nation states.*

Taken together, thus, we have several potential causes of lifelong learning diffusion — international and national sources as independent variables — and two levels to be analysed as dependent variables, namely the idea of lifelong learning and reforms linked to it.[1] In sum, examining this diffusion process on different levels can shed light on which elements of policies are more or less likely to be disseminated, and allows for the distinction between rhetorical activity and actual reforms.

A mixed-methods design for analysing an actor-centred diffusion process

Diffusion is a process of policy dissemination in which structural factors are often made prominent, such as the decision of other governments or the relative position of a national economy (e.g. Jahn 2006; Simmons *et al.* 2008a). While diffusion studies that do not rely on coercion usually conceive of the process as being uncoordinated (e.g. Simmons *et al.* 2008b), this article explores the influence of actors — international organisations — in the process of dissemination. This idea of actors as nodes in a system of voluntary communication and resulting diffusion has some distinct methodological implications.

Basically, given the assumption of a world society, data for this article need to cover most parts of the world, and cannot be restricted to the EU or the

OECD only. Since there is no data set readily available, the data for this quantitative analysis are based on several sources and partly involve transformation from qualitative to quantitative data. I primarily rely on textual material that is transformed to a binary-coded variable, and this procedure results in data on 99 countries. The textual data have been accessed from the UNESCO International Bureau of Education (IBE). Around every 4 years, the Geneva-based IBE convenes the 'International Conference of Education'. In preparation for this conference, countries submit policy reports focusing on partly predetermined policy questions and describing the current education system and governmental policies. Moreover, the IBE established a database, the 'World Data on Education' (UNESCO 2003), that is based on information from the reports but also contains additional details.

I evaluate the reports of the years 1996, 2001 and 2004. Before 1996, some textual information is available, but it is difficult to use comparatively over time and cross-nationally. Since its 1996 conference, the IBE has shifted to more comprehensive and comparable reporting and related databases. In the course of the following meetings, the office has actively promoted the submission of electronic reports in the English language, so that the reports become more frequent and more equally dispersed over the years. I give some earlier data in the text, but tables and calculations are based on the meetings from 1996 onwards. A related caveat is that a period of less than 10 years is usually short for studies of policy implementation, convergence and diffusion (Héritier 1993: 17–18; Heichel and Sommerer 2007: 113). However, these time restrictions are due to the availability of data and the fact that I analyse an ongoing process in policymaking. Since I do not evaluate whether the reforms of lifelong learning have any impact — for example changed individual learning periods — the time horizon seems adequate to show at least whether countries have started reforms. Nonetheless, it is reasonable to assume that the number of reforms is about to increase in the coming years, so that the gap between the spread of ideas and reforms can be expected to decrease.[2]

The analysis of the policy reports is carried out in two steps, one relating to the idea of lifelong learning, the other one related to reforms. Assessing the spread of the idea of lifelong learning is based on a standardised content analysis. It is counted whether or not an education policy report contains a reference to the idea of lifelong learning, operationalised by the terms 'lifelong learning' or 'lifelong education' in different spellings. A binary coding is chosen since the length of reports varies widely: Developed countries often hand in long reports while developing countries do not have such capacities; a metric scale would thus cause a bias. To illustrate the development of this idea over time, a time series is needed, which is difficult, since the number of reports is not constant over the years but is growing. Besides, some countries submitted one report only, while others submitted three. In order to maximise the number

of observations, the reports are cumulated, but the different points of time are assessed in some analyses, too. The inquiry into lifelong learning reforms is carried out by a non-standardised text analysis (using pre-defined categories) of the same policy reports and the World Data on Education. These categories are based on the definition of lifelong learning as the aim to expand educational phases over the life-course, more specifically as measures linked to pre-primary education, adult education and higher education. Each country report is evaluated along this analytical grid. Reforms in the given area are marked, resulting in a binary-coded variable for each country.

To examine causes of lifelong learning diffusion, the data set is enlarged to include independent variables that — following the theoretical background — refer either to world societal activities or to national preconditions. Accordingly, one set of variables on international organisations is included, and another one on national conditions: International factors are operationalised as contacts to international organisations in the years 1996–2004. I assessed three organisations and international forums, namely the OECD as a global actor and the EU including the Asia–Europe Meeting (ASEM) as regional and interregional actors.[3] Close contact to the OECD was assumed when a country has either been a member of the OECD or when it was a partner country in education programmes (defined as having taken part in an education policy review, in the indicator programme or in the Programme for International Student Assessment). EU influence was assumed when a country was an EU member, accession country, candidate or potential candidate. ASEM influence was assumed when a country was either influenced by the EU or participates in the ASEM. Further sources of policy diffusion across countries are NGOs active in education policy. To construct a variable linked to their activities, I relied on the abovementioned policy reports and the IBE World Data on Education and assessed in a non-standardised content analysis whether a country mentioned NGOs as actors in the education systems (see Jakobi 2007 for details). To account for national factors determining the adoption of lifelong learning, I rely on the economic situation in a country or the structure of the national knowledge-economy, generated by a query of the World Development Indicators. The economic situation of a country represents its overall wealth, operationalised as the gross national income (GNI). I calculated the mean of the years 1996, 2001 and 2004, and calculated both with this metric value or with categorical data based on World Bank Classifications as lower, lower middle, upper middle and high income.[4] The structure of the knowledge economy is defined as the percentage of the Gross Domestic Product (GDP) produced through the tertiary sector. Here too, the value is based on the mean of 1996, 2001 and 2004, and I calculated this with both numerical as well as with categorical values.[5] Finally, neighbouring countries are often interconnected by similar policy developments

(e.g. Jeandesboz 2007). Following a UNESCO classification, I coded the geographical area of a country to look for herding effects or to assess different conditions in different areas.[6] Other factors like democracy, freedom or trade have not been included, since none of the theoretical hypotheses derived above — neither those derived from world cultural analyses nor the one opposed to it — would hypothesise a distinct effect on lifelong learning diffusion.[7]

In sum, this method produced a dependent variable that is based on qualitative information, but which is a binary-coded variable, and in which ideas and reforms are assessed independently from each other. The database contains 99 countries, of which 74 are non-OECD countries (compare endnote 6). While the data are sufficient to use as a panel for a descriptive assessment of the diffusion process, it is insufficient for a causal panel analysis over 8 years. This is for three reasons. First, developing countries do not regularly report at or attend the international UNESCO conference. Therefore, some countries are only included once. Second, their reports are often less detailed than those of developed countries. Both aspects lead to less fine-grained information on when lifelong learning was entering (or leaving) a national agenda, or when exactly a reform was carried out. Third, these gaps are systematic, because they represent difficulties of developing countries with regard to fewer resources available in the national administration. However, if the task of assessing worldwide changes is taken seriously, these conditions should not lead to a systematic underestimation of national activities.

I therefore decided to construct a panel only with data where such error can be widely excluded.[8] For the regression analysis, I tried to minimise the impact of the structural disadvantages in the data through assessing the time span 1996–2004 as a whole. I thus expanded the usual time of observation (1 year) to a larger period (8 years), and defined this as one point in time. A country that mentioned lifelong learning once in this time span is coded positively; the same is true for reforms. This favours developing countries insofar as they need to attend only one of the three conferences to be assessed, while the multiple attendances of developed countries (and a resulting bias) are not mirrored in the data.[9] The data set thus is missing hardly any data; in cases where specific indicators are not available for a given country, the cases are taken out of the statistical analysis.

The obvious disadvantage of such procedure is that I cannot assess any changes that occurred within these 8 years, for example repeated events or large-scale national changes. However, I see this disadvantage outweighted by the benefits: The first advantage is the high number of 99 different countries without systematic bias towards developed countries — a crucial and basic condition for analysing global diffusion and its conditions. Moreover, by assessing international organisations' activities, I model an actor-centred

diffusion process, in which the organisations are assumed to constitute a central node for communicating ideas and reforms. This is distinct from other models of diffusion, in which diffusion is a structural variable, for example modelled by trade dependency, FDI and the like.[10] The data enable me to carry out a regression analysis in which the variables, though analysed in the context of diffusion through interaction, are nonetheless independent. Data are generated in the context of UNESCO communication, while effects analysed should be based on communication in the frame of OECD and EU.[11] Finally, this method of calculation also makes it possible to measure the influence of organisations on diffusion processes that can be observed for a rather short period of time.

Since the dependent variable is binary-coded, I carry out a logistic regression analysis (Andreß *et al*. 1997: Chapter 5; Backhaus *et al*. 2003: Chapter 7; Hoffmann 2004: Chapters 2–3). Two criteria are used to assess the quality of the models calculated. First, determining the model's goodness-of-fit, the Likelihood-Ratio test provides information on whether a model without the proposed variables would explain the pattern, too — thus, whether the null hypothesis is to be rejected or not. For that purpose, the chi-square of the model is presented, marked with its level of significance, when this is 0.1 or less. A level of significance at 0.01 implies that the null hypothesis is rejected with a probability value of 99 per cent. When this value is 90 per cent or less, thus when the level of significance of chi-square is 0.1 or higher, the null hypothesis is not rejected. Besides, literature lists different measures for 'Pseudo-R^2' to estimate the variance that can be explained by the model.[12] Most of them based on the Log-Likelihood function, as McFadden-R^2, Cox and Snell-R^2 and Nagelkerke-R^2 (Backhaus *et al*. 2003: 440–2). My analysis follows Backhaus *et al*. (2003: 441, 447–8) who propose to use Nagelkerke-R^2 because McFadden-R^2 is in practice unlikely to reach the theoretical maximum of 1.[13] The results of the analysis presented include the logistic regression coefficients and, in brackets, the standardised effect coefficient, to achieve comparability of the different variables within a model.[14] I calculated nested models — models that are based on exactly the same cases — to achieve comparability of different variables across the models. Furthermore, the calculations do not include missing values, which results in varying numbers of cases in the statistical analyses.[15]

In total, the data and methods thus allow for a detailed analysis of the extent of lifelong learning diffusion and its causes across a wide range of countries. The data set includes original information on 99 countries in the time span from 1996 to 2004, enabling a comprehensive view on the global spread of a policy idea and related reforms. The following analysis will be carried out in two steps: First, I will show international activities on lifelong learning, presented as a qualitative analysis of several organisations. The outcome shows

that it is highly reasonable to assume the creation of a norm of lifelong learning. In a further step and based on descriptive statistics, I illustrate the dissemination of lifelong learning, in particular how ideas and reforms have spread. Third, I will turn to the causes of lifelong learning diffusion, analysing the interplay of international and national factors.

The global promotion of lifelong learning

The idea of lifelong learning as a norm in global education presumes that international activity actually refers to this concept. Indeed, the idea of lifelong learning has been promoted by several international organisations with different means: The UNESCO had already been involved in early debates on the issue, and in the 1990s the organisation continued its work on the subject. For example, in 1991, the UNESCO General Conference decided to establish a commission assigned to reflect the future of education systems. The 'International Commission on Education for the 21st Century' published a major report in 1996, underlining the importance of lifelong learning for future education systems:

> The concept of learning throughout life is the key that gives access to the twenty-first century. It goes beyond the traditional distinction between initial and continuing education … . In its new guise, continuing education is seen as going far beyond what is already practised, particularly in the developed counties, i.e. upgrading, with refresher training, retraining and conversion or promotion courses for adults. It should open up opportunities for learning for all, for many different purposes — offering them a second or third chance, satisfying their desire for knowledge and beauty or their desire to surpass themselves, or making it possible to broaden and deepen strictly vocational forms of training, including practical training. (UNESCO 1996: 111)

Moreover, being a related standard-setting activity, the 2001 revised 'Recommendation Concerning Technical and Vocational Education' conceptualised vocational education and training as being one element of lifelong learning (UNESCO 2001: I). As a consequence, barriers between different levels and kinds of education should widely be abolished, and flexible structures would be needed that guarantee individual entry and re-entry to education as well as continuous learning. Summarising these and other activities that UNESCO has carried out over the years, it becomes clear that the organisation invested many efforts in promoting lifelong learning (Gerlach 2000). It emphasises the importance of lifelong learning for both developed and developing countries (UNESCO 2005: 24–25). Standard-setting instruments,

declarations of world conferences or publications continuously underlined this value of lifelong learning.

The OECD began working on lifelong learning at the end of the 1960s, but without triggering national policy change. The visible re-emergence of lifelong learning again began in the 1990s. The 1994 'OECD Jobs Study' emphasised the need for further qualifying the labour force and the results of the 'Adult Literacy Survey' further illustrated a fairly serious lack of competencies among adults, which underlined the importance of further qualification (OECD 1995: 15, 1996: 237–8). The 1996 OECD education ministers' meeting was concerned with 'Lifelong Learning for All', constituting an initial event for the success of lifelong learning within the OECD, its members and beyond. Since then, the OECD has published a variety of issues linked to lifelong learning, ranging from issues of financing to education policy reviews (OECD 2000, 2002; Istance 2003). Furthermore, the OECD is well-connected to other international education policy actors, which secures a wide dissemination of its perspectives and a sensitive taking-up and framing of emergent issues: OECD representatives promote lifelong learning, for example, in the context of the European Bologna process or at ASEM meetings (Wurzburg 2003; ASEM 2005; Norwegian Ministry of Education and Research 2005). In sum, the organisation has carried out a wide range of initiatives, trying to bring lifelong learning closer to the countries. For example, recent changes in the German law on financing adult education have been prepared in collaboration with an OECD project on financing lifelong learning: The country established an Expert Commission on Financing Lifelong Learning in 2001 (Expertenkommission zur Finanzierung Lebenslangen Lernens 2004).

A further important international actor is the *EU*, which initiated activities in the early 1990s. A major public event has been the European Year of Lifelong Learning in 1996, which was followed by a strategy on lifelong learning adopted by the council, including diverse areas of education, from preschool to accreditation or teachers (European Council 1996). Since 1997, lifelong learning has been part of the European employment strategy, and the Lisbon agenda further reinforced the central role of education and qualifications (EU Commission 2000: 5 ; European Council 2000, 2002a: 1) The Memorandum on Lifelong Learning, published in 2000, included thoughts on indicators, benchmarks and best practices for lifelong learning policies (EU Commission 2000: 24–36). It was followed by the Commission's 'Making a European Area of Lifelong Learning a Reality' in 2001, emphasising the role of lifelong learning in empowering citizens and serving the economic goals of the Union (EU Commission 2001: 5). In their 2002 work programme on education and training, the European Council and the Commission again underlined the importance of lifelong learning and set the target that, by 2010, 'for the benefit of citizens and the Union as a whole … Europeans at all ages should have

access to lifelong learning' (European Council 2002b: 3). In the same year, a council resolution on lifelong learning was adopted, emphasising a 'cradle-to-grave' principle of education and the provision in different settings (European Council 2002a: 2). Later, the creation of a common qualification framework was decided, the implementation of which began in 2007 (EU Commission 2005: 4). An additional peak was the 2006 decision of the European Parliament and the Council on establishing a lifelong learning action programme. The agenda included programmes linked to educational phases from pre-primary and secondary to higher education, vocational education and adult education. From 2007 to 2013, more than 6.9 billion euros are planned to be invested and the programme has enabled the Community to develop wide-ranging education policies at the European level, including financing of programmes and technical assistance or the exchange of policies and their evaluation (European Union 2006: 2–10). In sum, lifelong learning has thus become a major issue in European education policy, and the EU has pursued this concept with several means and in different policy contexts.

Besides, lifelong learning has also become an issue of interregional activity, as the ASEM shows: In 2001, the meeting of foreign ministers approved a proposal on the 'ASEM Lifelong Learning Initiative', to be carried out during the following year. It held three international conferences in 2002 and presented conclusions to the head of the ASEM states in September 2002. The initiative resulted in a shared commitment and understanding of the different states regarding lifelong learning (ASEM 2002: 9). Corresponding to the EU idea, lifelong learning included all learning activities — formal, informal and non-formal. The importance of lifelong learning was linked to its role concerning employability and active citizenship as well as social inclusion and personal fulfilment (*ibid.*: 10). ASEM has maintained its emphasis on education with the establishment of regular ministers' meetings on education since 2007, including activities like the lifelong learning initiative (ASEM 2007). The meeting is thus a further example of how countries are continuously involved in discussions, working groups, projects and communication concerning lifelong learning, representing an additional forum in which countries not yet caught by the idea of lifelong learning can be convinced that it is important.

NGOs are linked to the development of lifelong learning in three ways, depending on the specific organisation and its way of working. First, NGOs can be providers of education, which means that they directly bring educators, educational material or schools to influence the educational situation in a country. Through this direct practice, world cultural ideas of adequate education can thus be established locally. A second way of influencing policy development is to participate and lobby in international contexts. NGOs can participate in international conferences, deliver background information or

lobby towards political aims. As participants in and observers of governmental lifelong learning activities, NGOs have taken part in international education meetings. A less typical, but nevertheless important case is the 'European Roundtable of Industrialists', an industrialist's association of high-ranking managers and also a non-governmental entity: The organisation has well-established contacts to the EU, regularly meets with EU presidencies and is also interested in education policy. For example, the organisation promoted the implementation of lifelong learning principles as part of education and training (Kairamo 1989; ERT 2003). A third means of influence by NGOs is direct or indirect participation in education policy development at the national level, for example through direct administrative assistance in formulating policy proposals or by campaigning for certain goals. The types of organisations that promote lifelong learning can thus range from those specifically interested in lifelong learning as a concept to others that are interested in some of its elements, such as further education or pre-primary schooling. As an analysis of the Yearbook of International Associations shows, only very few organisations are explicitly dealing with lifelong learning, while a larger number is concerned with education in general or with specific educational stages, such as pre-primary or adult education (Table 1). Nonetheless, as the rise in organisations linked to further education shows, prolongation of education is mirrored in NGO activity.

Taking together governmental and NGOs, there has thus been plenty of international activity on lifelong learning, ranging from official standards or recommendations to meetings on special issues such as financing. Centrally, international organisations have promoted the idea that lifelong learning is an important tool for national and individual progress. The abovementioned activities are only the main activities initiated by international organisations, but even this selection reveals that the amount of international activity makes it

Table 1 Number of NGOs active in promoting lifelong learning 1970–2003/2004

	1970	*1981*	*1990/1991*	*1995/1996*	*1997/1998*	*1999/2000*	*2001/2002*	*2003/2004*
Pre-school	1	1	8	8	7	9	12	15
Adult education	5	19						
Higher education	1	19						
Further education			81	42	94	108	126	182
Explicit LLL			1	2	2	2	2	5

Note: Numbers from the years 1970 and 1981 are not directly comparable to the others, because of a different classification of organisations.
Sources: Yearbooks of the Union of International Associations. Data of 2003/2004 stems from the online version of the Yearbook, last access on 30 December, 2005. This version is, however, constantly updated, so it is not identical with the printed version.

extremely difficult for countries to 'escape' the lifelong learning agenda. A dense network of activities has been formed, and a consensus has grown not only that lifelong learning is important, but also that it is an integral part of education policy. In that sense, lifelong learning has developed into a norm in education policymaking; it is nearly universally acknowledged and institutionalised as a common element of contemporary education policy. As a consequence, we could reasonably expect countries to adopt lifelong learning policies.[16]

The extent of lifelong learning diffusion

Lifelong learning is not an entirely new concept to all countries, and differences exist concerning the extent to which countries have been affected by the current international emphasis on the issue. Finland and Japan, for example, had already established lifelong learning policies before the mid-1990s (Report Finland 1996; UNESCO 2003: Japan). Nonetheless, these two cases do not represent typical developments in national education policy, and lifelong learning has only recently become prominent on a large scale: An analysis of an early UNESCO collection of education policy reports dating from the late 1960s (UNESCO 1971) reveals that there was hardly any reference to the idea of lifelong learning some decades ago — only six of 136 countries mention the idea. The analysis of more recent education policy reports reveals important changes: In the beginning of the 1990s, around 40 per cent of analysed reports include this idea (Jakobi 2006: 73). However, from the mid-1990s until 2004, countries have more and more frequently referred to lifelong learning in the context of education policy (Table 2). Nearly 80 per cent of the countries mention lifelong learning at least once in this period, including many developing countries.

These figures, however, only refer to whether or not countries mention lifelong learning, not whether they start policy implementation. While the spread of the idea alone might be impressive, we should nonetheless have a look at whether any consequences can be assessed. For this purpose, I analyse policies in the fields of pre-primary, adult and higher education.

Pre-primary education

Pre-primary education is the earliest stage of education, and, like 'kindergarten', it is also a very widely known idea (Rogers 2003: 63–64). However, the original idea linked to kindergartens — children should enjoy learning through playing — has changed in the course of lifelong learning discussions. Early learning in pre-primary education is emphasised because it introduces learning

Table 2 Diffusion of the idea of lifelong learning 1996–2004

	1996	*2001*	*2004*
Percentage of countries referring to lifelong learning			
In the respective year	62.8	70.6	72.0
Cumulative from 1996	62.8	71.8	78.8
Number of countries referring to lifelong learning			
In the respective year	27	36	59
Cumulative from 1996	27	51	78
Number of countries analysed			
In the respective year	43	51	82
Cumulative from 1996	43	71	99

Source: Policy reports submitted to ICE 1996, 2001, 2004; calculations are the author's.

activities and prepares for continuing learning — which is assumed to be a pre-condition for success in contemporary and future society. The emphasis on lifelong learning thus includes a new idea of early childhood and the need to prepare the ability of lifelong learning during that period. On the one hand, the intervention into early childhood can be justified by giving opportunities to children, in particular to those from disadvantaged backgrounds. On the other hand, the argument that learning processes should take place early also strictly complies with human capital theory (Becker 1964).

On the national level, increased attention to pre-primary education is mirrored in different facets of policy reforms. First, countries are increasingly introducing *compulsory pre-primary education*, even if it is difficult for them to enforce it. In 1993, Peru made pre-school education a compulsory part of its elementary education — although until today, only around 85 per cent of the children attend that stage (Report Peru 2001: 7–8). International activities and exchange further reinforce this trend. For example, Swaziland observed the South African debate on the introduction of 1 year of compulsory pre-primary education before schooling and evaluated how this could be adopted to the country's own needs (Report Swaziland 2004: 2). A further element of structuring early childhood education is the establishment of learning goals through a *pre-school curriculum*. By these means, the learning process can be extended towards early childhood even if there are no changes in the formal organisational structure. Countries that introduced curricula are located all over the world: Syria completed and introduced a kindergarten curriculum in 1998–1999 (Report Syria 2001: 7). In Australia, some districts have begun to implement learning curricula that begin at birth (Report Australia 2001: 42–43). Other policy reforms to extend pre-primary education

are, for example, increased state financing of such education. In Israel, 1 year of compulsory kindergarten was already introduced in 1978, but more recent proposals are concerned with introducing free tuition for 3–4-year-old children — because an earlier start in education is regarded to be more advantageous (Report Israel 2004: 18–19). Moreover, even if countries do not have a special system of pre-primary schooling, education can begin very early. Since 1985, the Netherlands has no longer provided separate pre-schools; instead, schooling is compulsory at 5 years of age, though most pupils enter school even 1 year earlier (UNESCO 2003: The Netherlands). Sometimes, the emphasis on early education is highlighted by the renaming of institutions: In 1996, Brazil reformed the organisation of its education system. One of the changes was that day-care and pre-school are now called 'early childhood education', and that this stage is now a part of basic education, besides primary and secondary education (Report Brazil 2001: 7).

In sum, the pre-primary education sector has undergone a major structuring process since the beginning of the 1990s. Although compulsory schooling has still only been established in a minority of countries, it has become a common part of education policy for the government to regulate that phase of life and the learning taking place therein.

Adult education

Adult education is the core field in which lifelong learning had been discussed as early as the 1970s. While earlier debates focused on individual development, current political ideas mainly refer to the need for up-to-date-qualifications.

Countries try to support individual learning efforts of adults by different political instruments. National Qualification Frameworks categorise learning achievements according to a list of possible qualifications and can assess and stimulate learning in adult life. These frameworks are often linked to discussions on lifelong learning because they enable the description, analysis and comparison of individual learning records, even when the learning process took place in very different settings. Depending on its specific characteristics, such a framework allows the accumulation and transfer of achieved learning across diverse sectors, including higher education. It is best understood as a credit accumulation system like the ones used in higher education contexts, but extended to — theoretically — all forms of learning, all educational stages, and all education and training sectors. Despite individual differences in the frameworks, it is obvious that, since New Zealand introduced the first framework in 1990, this idea has spread around the globe to very different countries (see Table 3).

Besides establishing qualification frameworks, another possibility to extend adult education is setting up laws and programmes related to lifelong learning.

Table 3 The diffusion of national qualification frameworks 1990–2004

Country	*Year of adoption*
New Zealand	1990
Malaysia	1993
Mexico	1995
South Africa	1995
Australia	1995
Namibia	1996
Netherlands	1996
UK (England, Wales and Northern Ireland)	1998
Ireland	1999
Singapore	2000
Slovenia	2000
UK (Scotland)	2001
Trinidad and Tobago	2001
Mauritius	2002
Philippines	2003

Source: Author's account, based on data from ILO Project on National Qualification Frameworks (2005) and World Data on Education (WDE) (The Netherlands).

Among the laws that countries have introduced is the Japanese 'Lifelong Learning Law' of 1990 that set up a bureaucracy and was one measure among others to create a learning society (Japanese Ministry of Education 1996). In Estonia, the 1993 Law on Adult Education established a legal guarantee for adults to continue their studies. The 1998 Education Act further regulated adult education and in 2003, an amendment extended opportunities to receive secondary and vocational education during adulthood (Report Estonia 2004: 16; UNESCO 2003: Estonia). The 1999 Thai National Education Act refers to lifelong learning extensively, defining it as 'education resulting from integration of formal, non-formal and informal education so as to create ability for continuous lifelong development of quality of life'. The act additionally stipulates that educational provision shall be based on the principle of lifelong education for all' (Report Thailand 2001: 46, 49). Moreover, countries can, in principle, provide *additional funding* for learning efforts in adulthood or they can try to stimulate the establishment of private institutions to foster lifelong learning. However, increased financing for lifelong learning activities seems to be a rare case. The most comprehensive activity reported was the establishment of the British learning accounts for adults, which implied governmental funding for individual adult learning activities.

In sum, adult education has been extended across the countries and, by means of qualification frameworks, this diverse field is increasingly regulated. While education has, for a long time, been linked mostly to children, recent

developments in the sector show substantial changes and the regular establishment of education during adulthood.

Higher education

Higher education has undergone a massive increase all over the world (Ramirez and Riddle 1991) and discussions about lifelong learning are likely to reinforce this phenomenon: Traditionally, the university is seen as the unique place that can create new knowledge and, in the meantime, can disseminate it to its students, who are often assumed to come directly from school to higher education. Higher education in this traditional sense thus constitutes the preparation of students for their first entry into the labour market. This educational sector, however, can also be understood as one among several opportunities to gain qualifications, that is while working, or during a temporary leave. In that sense, higher education institutions develop in places where qualifications of an already skilled workforce can be further updated. In consequence, borders between higher education and other educational pathways are increasingly blurring. An illustration of this is the Scottish Qualification Framework, which integrates all pathways and draws no distinction between grades obtained in universities and continuing education obtained elsewhere (ILO 2005). Besides, recognition procedures that assess professional experience and transfer it into academic grades facilitate entrance and transition through higher education: In France, after having worked for 5 years as an engineer, a professional can obtain the academic grade of engineer without having formally studied engineering (Qualification Framework Working Group 2005: 138–9).

Such cases signal a move towards higher education as a form of a standard further education, and countries cope differently with the challenge of expanding this stage. A first opportunity is to set up laws and programmes or to found new institutions to increase access. Countries vary widely concerning such measures: In 1998, South Korea established a higher education law that was intended to strengthen the possibilities for learners, 'such as part-time registration, expanded opportunity for transfer between schools, establishment of independent graduate schools, improvement of college entrance examinations, and enrichment of vocational education at junior colleges' (Report South Korea 2001: 2). In 1994, Austria established its first university for post-graduate studies, the Danube University in Krems, which offers courses for post-graduate and continuing professional education (Report Austria 2001: 161; UNESCO 2003, Austria).[12] Moreover, private institutions and private or individual funding are a further means for increasing participation rates without raising public investment in education. Egypt, for example, encourages the establishment of private providers because

it reduces governmental investments (Report Egypt 2004: 117). In Mauritius, the number of private tertiary institutions either providing distance education courses or being local providers has risen sharply (Report Mauritius 2004: 12).[13]

Thus, although higher education is still often seen as prolonging the period of formal schooling, the sector is increasingly being expanded as a place for updating knowledge for those who are not students in a traditional sense. As a special form of adult education, higher education offers specialised knowledge to older age-groups in the society — either those at the university for the first time or for those returning. Countries have invested different efforts to ensure this provision.

Comparing ideas and reforms

Evaluating all reforms undertaken by countries in the period of 1996–2004 reveals diverse outcomes with regard to lifelong learning policies. Only a total of 53 countries have introduced lifelong learning reforms — a rather low figure when considering that the indicator is rather broad and includes many different reforms (see Table 4). Among these countries, 34 have reformed the field of pre-primary education to increase coverage by compulsory education, to structure learning by a curriculum or by other means. In the field of adult education, a total of 33 countries have initiated reforms such as qualification frameworks, new laws concerning adult education for lifelong learning and

Table 4 Number of lifelong learning reforms 1996–2004

Reform	*Number of countries*
Pre-primary	
Compulsory pre-primary education or introduction of curriculum and other reforms	34
Adult education	
Qualification frameworks, new laws, programmes and institutions, increased financing and other reforms	33
Higher education	
New laws, programmes and institutions, increased financing and other reforms	19
Number of countries with at least one of the reforms	53

Source: Author's calculations, based on policy reports submitted to ICE 1996, 2001, 2004 and the WDE.

others. Reforms in the higher education sector, for example the establishment of new institutions or new laws for expanding access, have been carried out by 19 countries. In sum, these figures show that countries are generally active in that area. However, compared to the spread of the idea of lifelong learning, there is obviously more talk than action: While nearly 80 per cent of the countries mentioned the idea in their policy reports, countries are less eager to introduce corresponding reforms.

In sum, the analysis of national policies worldwide illustrates that there is a growing consensus on lifelong learning and that a majority of countries are also intensively trying to reform their education systems in order to implement lifelong learning measures. However, given the fact that the indicator for lifelong learning reforms has been rather broad, there is obviously a difference between the acknowledgement of the idea of lifelong learning and the introduction of reforms, indicating a decoupling of the lifelong learning discourse and corresponding activities. We can thus speak of a global consensus on lifelong learning but a large divergence in its realisation. The following section shows how international and national factors can explain this pattern.

Causes of lifelong learning diffusion

While the theoretical part presented international organisations as important vehicles for lifelong learning dissemination, the empirical analysis has shown that important cross-national differences prevail in realising this goal. A correlation analysis shows some first relations of different variables and lifelong learning diffusion (see Table 5). The OECD seems to be the most prominent organisation with regard to lifelong learning and the reforms linked to it. Countries that report activities by NGOs in their education system are positively correlated with lifelong learning, but these organisations do not have a significant correlation with reforms carried out in these countries. Regional diffusion — the emulation of a country in its neighbours' policies — does not seem to take place on a large scale. The correlation analysis also reveals that low-income countries and countries with a small service sector indeed refer less often to lifelong learning than other countries and they introduce reforms linked to it less frequently.

Such correlation analysis, however, is only a start and does not illustrate how organisational influence is related to other factors. Table 6 presents three multivariate models that assess the impact of the OECD, EU, also including ASEM, in interplay with the other factors. A model that includes the OECD, NGOs and service sector explains 27.3 per cent of the variation and each of the variables is significant. At the world level, the EU without the ASEM context is

Table 5 Correlations of lifelong learning, organisational linkages and national preconditions

	Idea of lifelong learning	*Reforms linked to it*
Organisational linkage		
OECD influence	0.307***	0.293***
EU influence	0.260***	0.090
EU influence including ASEM	0.285***	0.082*
NGO influence	0.235***	0.118
National preconditions — area		
Africa, South of Sahara	0.042	0.072
Asia and Oceania	−0.170*	−0.012
Central Europe and former USSR	0.172*	−0.033
Latin America and the Caribbean	0.018	0.007
Middle East and North Africa	−0.121	−0.141
North America	−0.107	−0.010
Western Europe	0.121	0.122
National preconditions — economy		
Low income	−0.229**	−0.204**
Lower middle income	−0.009	−0.040
Upper middle income	0.208**	0.108
High income	0.037	0.135
National preconditions — service sector		
Small service sector	−0.341***	−0.266**
Medium service sector	0.096	0.137
Large service sector	0.241	0.127

* Significant at 0.1; ** significant at 0.05; *** significant at 0.01. Coefficient: Spearman-rho, two-tailed test.

Table 6 Variables influencing the diffusion of the idea worldwide

	Model 1	*Model 2*	*Model 3*
OECD	1.30* (2.66)		
EU		1.809 (8.00)	
EU/ASEM			1.575* (3.79)
NGO	1.262* (2.28)	1.350** (2.41)	1.267* (2.29)
Service sector	0.048* (1.00)	0.053** (1.00)	0.061** (1.00)
Constant	−2.401* $(0.03)^{-}$	−2.455 $(0.03)^{-}$	−2.914** $(0.02)^{-}$
Chi^2	15.64***	15.835***	16.801***
Nagelkerke-R^2	0.273	0.276	0.291

* Significant at 0.1; ** significant at 0.05; *** significant at 0.01.
Note: Weighted effect coefficient in brackets; nested models, $n = 84$.

not a significant variable, which is likely to be the case because it is regionally limited. The organisation's influence is only significant when the EU is linked with the ASEM and the model explains even more variation than the OECD — which can be expected because the EU including the ASEM in fact consists of two organisations. In general, the models cannot explain more than around 30 per cent of the overall variation. However, this small amount can be traced back to the fact that the data are mainly binary-coded and not aggregated.

The emphasis on the role of the OECD as a key organisation immediately raises the question whether the income structure of a country is more important. As the analysis shows, OECD activity in education is wide-spread, but OECD activity and high-income countries correlate. Nonetheless, the OECD demonstrates some significance beyond high-income countries, so that the national income is not the decisive factor for the organisation's influence. While the correlation analysis showed that the regional clustering of lifelong learning policies due to policy transfer among neighbouring countries is unlikely, there may nonetheless be different decisive variables across the geographical areas. This is likely to be the case, for example in sub-Saharan Africa. Countries located there show a combination of a high correlation in activities of NGOs and a negative correlation of OECD and EU activities (see Table 7).

A closer analysis shows that the variables cannot equally explain the variation across all geographical areas: Activities of NGOs are mostly concentrated on sub-Saharan countries and their effect decreases if these countries are taken out of the sample. As a second special case, the Central European countries and the former USSR refer more often to lifelong learning than other areas and their education policies are strongly influenced by the OECD and EU. In fact, the OECD loses its significant explanatory power when the countries of Central Europe and the former USSR are excluded from

Table 7 Correlations of organisational linkages and different areas

Region	*OECD*	*EU*[a]	*NGO*
Sub-Saharan Africa	−0.424***	−0.296***	0.310***
Asia and Oceania	0.019	−0.326***	−0.008
Central Europe and former USSR	0.257***	0.460***	−0.015
Latin America and Caribbean	−0.036	−0.222***	0.007
Middle East and Northern Africa	−0.224**	0.093	−0.115
North America	0.142	−0.90	0.111
Western Europe	0.385***	0.553**	−0.256**

[a]Without ASEM since ASEM per definition exceed the EU's influence on Asia.
** Significant at 0.05; *** significant at 0.01. Coefficient: Spearman-Rho, two-tailed.

the sample. A third special case is the Middle East, which is not highly exposed to OECD influence and only has a small number of countries that mention the idea of lifelong learning. The absence of the OECD in this geographical area seems to have an impact on the absence of lifelong learning there. The variation explained by the OECD decreases when the Middle East and Northern Africa are excluded from the sample. Although regions thus differ in the extent to which they are influenced by international or NGOs, it was nonetheless observed that the diffusion of the lifelong learning is mainly promoted through these organisational linkages. Organisational linkages are thus more decisive for this process than a country's economic preconditions or the area where it is located (Jakobi 2006: 99–109).

However, as shown before, the diffusion of lifelong learning as an idea is not congruent with reforms linked to that idea and, accordingly, conditions for both processes should be different. The diffusion of reforms thus demands other explanations, and theoretically, national preconditions or variables inherent to the national political system are likely to become much more relevant at this stage. It is nonetheless possible to explain a variation of 14.5 per cent only by a country's linkage to OECD activities and having a higher income (upper middle income and high income; see Table 8). The linkage to the OECD is thus also important with regard to initiating reforms, and the organisation's influence exceeds that of national income. Hence, the organisational influence on initiating reforms is still restricted to a certain group of countries marked by a higher GNI per capita. Generally, countries with a lower income — low-income and lower middle-income countries — are less likely to initiate reforms than countries with higher income, and a lower income significantly reduces a country's probability of adopting reforms linked to lifelong learning.

Table 8 The influence of organisational linkages and higher national income on reforms linked to lifelong learning worldwide

	Model 1	*Model 2*	*Model 3*
OECD	1.004** (1.56)		
EU		−0.056 (0.97)$^{-}$	
EU and ASEM			0.349 (1.17)
Higher income	0.800* (1.43)	1.014** (1.59)	0.900** (1.49)
Constant	−0.721**$^{-}$ (0.77)$^{-}$	−0.293 (0.92)$^{-}$	−0.383 (0.89)$^{-}$
Chi^2	10.883***	5.642*	6.206**
Nagelkerke-R^2	0.145	0.077	0.085

* Significant at 0.1; ** significant at 0.05; *** significant at 0.01.
Note: Weighted effect coefficient in brackets; nested models, $n = 95$.

Thus, it is evident that the conditions for the establishment of reforms linked to lifelong learning are different from the ones that explain the diffusion of the idea. Although the OECD still plays an important role, national preconditions, in particular national income, are increasingly important.[17]

Nonetheless, the findings illustrate that international organisations can be very successful in disseminating education policy ideas and in establishing common goals. Although the impacts of the organisations differ, the frequency and the different ways by which they communicate the importance of lifelong learning obviously had an effect. Lifelong learning, although implemented to a much smaller extent, is nearly universally acknowledged as an important element of current education policy.

What do these findings tell us with a view to the initial hypotheses? The first hypothesis — according to which lifelong learning is disseminated due to international activities — was confirmed. However, as we could also observe, different organisations are more or less important in different areas, and, even more important, their influence decreases when we do not assess the dissemination of the idea of lifelong learning, but reforms linked to it: As the second hypothesis claims, there is a large decoupling between mentions of lifelong learning and attempts to realise it. While nearly 80 per cent of all countries mention lifelong learning during the time span investigated, only about 50 per cent introduce reforms. The realisation of this policy is thus very different from its prominence in education policy discourses. This is, finally, strongly linked to the third hypothesis, the idea that lifelong learning is primarily caused by a functional necessity. As the analyses show, lifelong learning is prominent also in countries that are less obviously linked to a knowledge-based society or knowledge-intensive industries. The idea can widely be diffused across the world. Only when it comes to the realisation of lifelong learning policies do national preconditions become more important, so that countries that have a higher national income are more likely to introduce these reforms than others. In sum, we can thus state that lifelong learning has developed into an important policy goal in current education policy and is promoted as the norm for modern education systems by international actors. Very different countries respond to this development by referring to this idea more regularly, but wealthy countries are much more likely to introduce corresponding reforms.

Conclusions: the complex process of global policy diffusion

This article has analysed policy diffusion through international organisations. Drawing on the distinction between agenda setting and policy implementation, it shows that international organisations are important vehicles for disseminating

policy ideas, while reforms, even if stimulated by international debate, are foremost implemented following a national logic. To show this, I first outlined rival theoretical explanations for the diffusion process, relying on world society theory and the assumed importance of international organisations, compared to a functionalistic account that supposes national preconditions to be the major cause for lifelong learning diffusion. As was shown, international organisations have indeed promoted lifelong learning intensively, so that the idea of a common norm of lifelong learning seems justified. However, debates on knowledge societies also point to the growing importance of a highly skilled workforce and continuous educational investments, so that lifelong learning could be a national policy targeted at these needs. As the diffusion of lifelong learning shows, both theoretical explanations are justified: On the one hand, the idea is widespread, and the quantitative analysis shows that international organisations are a crucial factor for this spread, which strongly supports sociological institutionalism. On the other hand, reforms linked to lifelong learning show a different pattern: Here, international organisations are still important, but the wealth of a country becomes crucial.

While I mainly focused on the OECD and EU in this article, future research could be undertaken to explore the impact of regional organisation and regionalisation with regard to lifelong learning. As the example of EU and ASEM shows, these are relevant for the dissemination of lifelong learning, but their role as regional and inter-regional actors has remained widely unexplored yet. Also, coming from a different angle, further analyses could shed light on more specialised reforms linked to lifelong learning, for example a specific form of financing or the like, to show which reforms are more likely to be implemented than others, and where. Categories in this article have been defined broadly, but future analyses could refine them.

On a general level, the findings show that it is important to distinguish between different parts of diffusion processes: Although ideas and policy reforms are intrinsically linked, the reasons for adoption might vary considerably. Causes of diffusion processes are highly dependent on the level of analysis, more specifically on what exactly is assumed to be disseminated. The findings of this article suggest that ideas, being part of discourses, can be transferred easily, while reforms are closely linked to the capacity of the national political system, and rely heavily on national preconditions and path dependency. Further research could assess whether this assumption holds also in other policy fields. Such a comparison would be particularly fruitful given the fact that education is usually a more consensual policy issue, so that divergent opinions in a global discourse are less probable, supporting a wide and quick dissemination of ideas. Other policy fields could show a very different pattern.

The article also has methodological implications for research on policy diffusion and effects of international organisations: It shows the importance of

differentiating between different parts of a diffusion process and the need to examine these stages separately. Diffusion of ideas is very different from diffusion of reforms, not to mention the actual impact of reforms — which would be worth a further inquiry. Research on regimes has already pointed to different causal variables of these stages (e.g. Mitchell 2002), and this article shows similar findings for diffusion-related research.

From a perspective of operationalisation, the article shows that 'globalisation variables' are not only those traditionally used, like FDI or the dependency of trade-partners (Jahn 2006). Instead, adding international organisations as 'nodes' to quantitative diffusion studies can be helpful in gaining a more actor-centred analysis and conceptualisation of diffusion processes. Moreover, this includes modelling contact to international organisations in a way that does not only rely on membership. As the examples of EU and OECD show, the outreach of an international organisation may well go far beyond its member base. Moreover, relying on more differentiated indicators for contact to organisations also enables researchers to assess the influence of a specific international organisation separately across different policy fields.

Given increased and growing transnational communication processes, assessing short-termed diffusion processes will probably become more important in the future. Even if the focus on 'explosive' diffusion processes can — for good reasons — be seen sceptically (Meseguer and Gilardi 2009: 532–3), exploring short-term diffusion processes allows a particular picture of how diffusion starts and, in consequence, could shed light on the underlying conditions for successful and non-successful diffusion processes.

Moreover, while the quantitative approach used in this article could assess the diffusion of policies in a cross-national perspective, more qualitative research could also elaborate on case studies that show more closely the translation processes that countries undertake in applying a global norm to their political system. In particular, the different national conditions that states face make it highly probable that countries link their national paths very differently to global activities. Besides, international organisations have a different effect on the countries depending on their standing in the international community as well as on their reception within the countries. Finding out the local conditions for adoption or non-adoption of global ideas is still a major task to tackle, and research on international organisations and policy diffusion thus offers ample opportunities for future inquiries.

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Notes

1 Other important causes for lifelong learning diffusion would be herding effects or the emulation of countries in their neighbours' policies (Berry and Berry 2007). From this point of view, countries in a particular region would be more likely to adopt lifelong learning policies than others. Subsequent analyses will also account for this factor, but given the idea of a global policy of lifelong learning, I do not further test this assumption as a single hypothesis.

2 Temporarily restricted data should not lead to the fact that only long-running diffusion processes are examined. Given that the focus of diffusion studies is on the process, and that globalisation and internationalisation processes are likely to result in more and different diffusion patterns (compare Jahn 2006: 406–7), a short time period of available data represents a methodological challenge that needs to be tackled.

3 Since data were derived from UNESCO sources, it was not possible to establish variation with regard to UNESCO contacts. Therefore the effects of this organisation are not assessed quantitatively. Detailed calculations and further details of the methodology can be found in Jakobi (2009a, 2006).

4 Categories are 'Low Income', 'Lower Middle Income', 'Upper Middle Income' and 'High Income', based on a World Bank classification.

5 The metric values have been recalculated as categories of 'service economy', following a principle of approximately the same size on any category in the data set. This classification results in a 'Low Service Economy' represented by a share of services of up to 48 per cent of the GDP, a 'Medium Service Economy' with 49–62 per cent and a 'High Service Economy' with a share of more than 62 per cent.

6 According to these categories the geographical dispersion of the data is as follows: *Sub-Saharan Africa* (Botswana, Ethiopia, Ghana, Kenya, Lesotho, Malawi, Mauritius, Namibia, Nigeria, Seychelles, Sierra Leone, South Africa, Sudan, Swaziland, Tanzania, Uganda, Zambia, Zimbabwe), *Asia and Oceania* (Afghanistan, Australia, Bangladesh, Bhutan, Cambodia, China, North Korea, India, Indonesia, Iran, Japan, Malaysia, Maldives, Myanmar, Nepal, New Zealand, Pakistan, Philippines, South Korea, Sri Lanka, Thailand), *Central Europe and former USSR* (Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Kyrgyzstan, Latvia, Poland, Republic of Moldova, Romania, Russian Federation, Serbia and Montenegro, Slovakia, Slovenia, The Former Yugoslavian Republic of Macedonia, Ukraine), *Latin America and Caribbean* (Argentina, Barbados, Belize, Brazil, Costa Rica, Guyana, Jamaica, Mexico, Peru, Suriname, Trinidad and Tobago), *Middle East and North Africa* (Bahrain, Cyprus, Egypt, Iraq, Israel, Jordan, Kuwait, Libya, Malta, Oman, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates, Yemen), *North America* (Canada, United States of America), *Western Europe* (Austria, Belgium, Denmark, Finland, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Sweden, United Kingdom).

7 So far, case-based evidence from related research suggests that lifelong learning ideas and reforms are adopted by democracies as well as non-democracies, for example in Myanmar, China and Zimbabwe (Jakobi 2009a).

8 Table 2 represents such an approach, assessing the spread independently for different points in time.

9 Other variables (e.g. GNI per capita) have been recalculated to a mean value for these 8 years; special attention has been paid to whether large changes have occurred that could influence results.

10 See Jahn (2006: 410–11, 415) for a discussion of these variables. See Holzinger *et al.* (2008) for assessing the effects of transnational communication with a long-term and more detailed, but geographically restricted database.

11 Assessing UNESCO influence is thus not possible, since no variance would exist on the side of the independent variable: All countries in the data set have close contact to UNESCO, since this contact is where the original data come from.
12 Logistic regression analysis is based on odds and iterations. Therefore, its R^2 measures are not strictly comparable to the R^2 of a linear regression analysis.
13 Cox-and-Snell-R^2 is per definition less than 1 (Backhaus *et al.* 2003: 441). The estimations of variance based on Nagelkerke-R^2 presented are thus slightly higher than results based on McFadden-R^2 would be. However, literature tends to use McFadden-R^2 (Andreß *et al.* 1997: 287; Hoffmann 2004: 38).
14 A value <1 represents a negative influence of the variable, and is marked with a '−' in the tables.
15 For example, models that compare the impact of the service sector and that of the GNI are only calculated with cases that have values for both. In such a case, the number of cases analysed is reduced to 84.
16 It should be noted that lifelong learning is only one part of the overall education policy discourse in these organisations. Therefore, it seems reasonable to speak of an organisation influencing a national lifelong learning agenda, but not of an organisation selecting members or partner countries due to their lifelong learning policies and vice versa. The underlying data set is thus not biased due to membership- or policy-selection. There is, however, some bias in the data set concerning countries in Latin America: Countries there tend to submit their reports in the Spanish language, which renders their overall number in the data set rather low (see endnote 6). These countries partly have contact with the OECD through membership or participation in the programmes (Mexico, Argentina, Brazil, Jamaica, Peru). Despite the small number, there thus exists some variance on the independent variable 'IO contact'. Similar arguments apply to Africa, where the number of countries is somewhat higher (but formerly French colonies are underrepresented in the data set, given that they often hand in reports in French.)
17 I also tested the model that was significant with respect to the diffusion of the idea of lifelong learning, but this did not show significant values. This and further calculations are available upon request.

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