Despite recent attempts at implementation, the government must play a more active role in promoting lifelong learning in Hong Kong. They did little until 1989, when the Open Learning Institute (OLI) was established. The OLI was innovative because it provided degree level courses for adults, without concern for prerequisite academic qualifications. Demand was high and the program was a success, despite eventual lack of government funding. Surveys about the lifelong learners revealed that the majority are unmarried employed females below the age of 35, who have become an increasingly important part of the labor force. With greater support from the government, lifelong learning programs could reduce skills shortages, promote economic growth, and reduce the risk of structural unemployment. Educational policy makers must adopt an "education for development" model to take into account the total needs of the economy. Lack of government regulation has resulted in an increase in private education providers with questionable quality. The government must implement standards and regulations, and actively support lifelong learning in order to maintain Hong Kong's competitive position within the global economy. Contains 21 references. (YKH)
Lifelong Learning in Hong Kong

Grace O.M. Lee

In: Lifelong Learning: Policies, Practices, and Programs
Lifelong Learning in Hong Kong

by Grace O. M. Lee

This paper describes the development of lifelong learning in Hong Kong and, in that context, examines Hong Kong Government policies as they relate to lifelong learning. Survey findings from three studies illustrate the huge demand for continuing education, depict the profile of Hong Kong lifelong learners and identify the strong economic justifications for government investment in lifelong learning. However, the government generally has adopted a laissez-faire policy on the promotion of lifelong learning and the provision of continuing education. In view of the implications of lifelong learning for people and the society, this paper argues that the Hong Kong Government should play a more active role in promoting lifelong learning, particularly with regard to the less educated sector of the community which, for various reasons, is less attracted to the idea. The government should also play a more active role coordinating and monitoring adult and continuing education programs, currently dominated by private providers.

THE CONCEPT

Lifelong learning refers to the "lifelong process of continuous learning and adaptation: it is distinguished from lifelong education which refers to the structures, systems, methods and practices that attempt to enhance lifelong learning" (Candy and Crebert, 1991, p.4). Further, these authors argue that the differences between lifelong learning and lifelong education are based on the philosophical implications of the former and the practical applications of the latter. Knapper and Cropley (1985, p. 20) define lifelong education as "a set of organisational, administrative, methodological and procedural measures which accept the importance of promoting lifelong learning." Lifelong learning is not the spontaneous, day-to-day learning of everyday life but what Tough (1971) called "deliberate" learning and which Knapper and Cropley described as having the following characteristics:

- it is intentional — learners are aware that they are learning;
- it has a definite, specific goal, and it is not aimed at vague generalisations such as developing the mind;
- this goal is the reason why the learning is undertaken, and is not motivated simply by factors like boredom;
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In the 1970s, the concept of continuing education in the sense of providing educational opportunities beyond formal education had only emerged. At this time, the Department of Continuing Education at the University of Hong Kong, which was established in the 1950s, organized remedial courses for adults, while the Kalong Education Centre under the Department of Education, as well as the Caritas Adult Education Centre, offered a variety of courses for adults, including basic-level, secondary, and tertiary courses. Additionally, the Extramural Department of the University of Hong Kong (renamed as the School of Continuing Education in 1983) and the School of Continuing Education of the City Polytechnic (renamed the Hong Kong Polytechnic University in November 1994) were established in 1988 and 1991 respectively, to meet the increasing demand for adult education. During this same period, many professional bodies and commercial ventures entered the continuing education field.

The Centre for Professional and Continuing Education of the Hong Kong Polytechnic University (renamed the Continuing Education and Lifelong Learning Centre in November 1994) and the School of Continuing Education of the City Polytechnic (renamed the City University) during this same period, many professional bodies and commercial ventures entered the continuing education field.

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these providers vary in size and breadth of operation. Some are departmental extensions of large tertiary institutes, while others are stand-alone operators employing skeleton staffs. Courses range widely, from interest and leisure classes, through to professional qualifications programming. Duration also varies widely. Awards include certificates of attendance, diplomas and degrees. With only a few exceptions, most of the providers are not under the scrutiny of any academic accreditation or validation body; therefore, the standards and quality are not monitored and there is no assurance offered to the learners. Interestingly, and despite the large number of education providers, opportunities to pursue formal degrees are limited.

The establishment of the Open learning Institute (OLI) in 1989 was a breakthrough in the government’s involvement in continuing education which had, until this point in time, been laissez-faire. What distinguishes the OLI from other continuing education providers, both in Hong Kong and elsewhere, is its focus on offering degree level courses in a part-time distance learning mode to adults, without concern for prerequisite academic qualifications. It has equal status with the other degree granting institutions in Hong Kong and overseas both for the purposes of employment and post-graduate studies. Throughout its first five years, the OLI received diminishing government funding and, in 1993, became self-financing. The OLI operates with its own administrative system and salary structure. There have been demands for further government subsidies to support the OLI, but as of this date the government has clearly indicated its reluctance to subsidize adult learners in this forum.

The OLI recruited its first class of students in late July 1989. More than 63,000 applications were received, and the overwhelming response resulted in long queues even for getting an application form (Watt, 1994, p. 13). The OLI was the first dedicated institute created by the government to offer degree level study for adult learners who had missed the opportunity earlier in their academic careers. Further, although free compulsory primary and lower secondary education had been introduced in 1979, university places were scarce until 1988 when the plans for tertiary education expansion were endorsed by the Executive Council. Prior to 1980, only 3% of the typical tertiary education age group could enjoy degree level education, though this grew slowly during the decade. In 1989, the goal was to increase first year, first degree places from 7% to 18% for the 17 to 20 year old age group by the turn of the century; however, the pent-up demand in 1989 was enormous. The overwhelming response to the OLI reflected the undeniable yearning of the Hong Kong adult population for degree level education, though it is also important to recognize that the timing of the OLI’s introduction immediately followed the June 4th mainland China incident, thereby illustrating and amplifying public attitudes towards investing in academic credentials in the face of political uncertainties since higher education qualifications were seen as a major factor affecting emigration potential.

On balance, and even after factoring in the development of the OLI, the government’s attitudes and policies towards the development of lifelong learning are still best described as laissez-faire. Despite expert recommendations for better coordination, equal opportunities and an open learning centre, the government has not played a central role in the provision or the monitoring of adult or continuing education. Hence, lifelong learning has been left mostly in the hands of private providers, with no assurance of quality, standards or integration of learning opportunities. The establishment of the OLI was an important milestone in the development of the formal side of lifelong learning, offering an alternate venue for degree level studies. With its open entry system and no academic prerequisites, OLI learners study at their own pace, in convenient places, and at convenient times. Furthermore, the quality of OLI graduates is maintained by high standards of academic excellence and the degrees are comparable to those offered by other government recognized Higher Education Institutes (HEIs) (i.e., the university sector). However, it is important to recognize that the government is not committed to funding or subsidizing continuing education; the OLI, and as well the continuing education departments of the degree granting institutions, are required to be self-financing.

By April 1994, about 50,000 adults had enrolled in OLI courses. Over 17,000 of them are active students, reading for one of the 21 named undergraduate degree and 13 sub-degree programs. Each semester, approximately 40 courses are presented and this number increases between 10% and 15% annually. The OLI graduated its first group of students in December of 1993, and since that time studies have shown student completion rates have been quite acceptable and that the OLI is successfully penetrating the adult first degree population that it was established to serve (Dharanarajan, Swift, & Hope, 1995, p. 179). One in every 150 Hong Kong adults is an OLI student, the median age of OLI students is 27 to 29, and their median annual income is US$14,000. Although entry is open in terms of previous academic qualification, the majority of students have completed at least 11 years of pre-tertiary schooling. The following section details a more comprehensive analysis of the characteristics and motivations of lifelong learners in Hong Kong.

PROFILE OF LIFELONG LEARNERS IN HONG KONG

Three surveys carried out at approximately the same time provide a rather comprehensive picture of the characteristics and the motivations of Hong Kong lifelong learners enrolled in continuing education programs. The surveys differed in scope and in terms of the target participants. A broad based random sample telephone survey, conducted by Chan and Holford (1994), determined participation rates in formal lifelong education, the nature of courses taken, motivations supporting course enrolment, and deterrents associated with lifelong learning. By comparison, Chung et al. (1994) focused on students enrolled in continuing education offered by continuing education units of the University of Hong Kong, the Chinese University of Hong Kong, the City University of Hong Kong, the Hong Kong Polytechnic University, and the Baptist University, as well as the student body of the OLI. The third study, by Watt (1994), focused solely on the student population of the OLI.

Chan and Holford’s study (1994) surveyed a random group of 325 Hong Kong citizens. The following summary, pulled from Chan and Holford’s study, paints a general profile of those engaged in formal lifelong learning activities. (Percentages have been rounded to the nearest whole number.) The majority (51%) of the sample was between 20 and 34 years old. Sixty per cent were married, and of those 87% had
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quent labour market benefits that include promotions, job enhancements and
career changes.

The study by Watt (1994) surveyed 731 students enrolled at the OLI. Unlike the
findings from the previous two surveys, where females represented more than half the
participants, 50% of the OLI respondents were male. Almost half of them
(48%) were in their 20s, and more than a third were between 31 and 40 years
of age or younger. The respondents were single, and only 21% of those who
did not have a

degree. Most were engaged in clerical, technical and administrative jobs, and "emigration
considerations". The male learners were more motivated by "professional
advancement", "social contact" and "professional advancement". and "emigration
considerations". Students undertaking business courses looked for

job enhancement while arts students pursued "cognitive interest". Married learners
and those with children were more inclined to be motivated by "emigration
considerations".

In summary, the three surveys document striking similarities among lifelong
learners in terms of sex, marital status, occupation and motivation for learning.
The ratio of male to female learners and the fact that female workers have become an increasing
proportion of the workforce in the tertiary industries. In general, the learners
were more motivated by "professional advancement", "social contact" and "emigration
considerations". The male learners were more motivated by "professional
advancement", "social contact" and "professional advancement". and "emigration
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job enhancement while arts students pursued "cognitive interest". Married learners
and those with children were more inclined to be motivated by "emigration
considerations".

The report by Chung et al. (1994) included 3,998 students enrolled in the contin-
uing education units of the HEIs and the OLI. The ratio of male to female learners
was quite high, while the rate for single respondents was 69%. The participation rate for
tertiary students was 22%. Twenty-three percent of the respondents
were female. More females (53%) than males (47%) participated in continuing
education, and the participation rate was higher for younger people, especial-
ly those with children. Ninety-four percent of the respondents had completed only secondary
school education or less, 17% per cent had attended at least one course, and only 5% of those
who had attended at least one course had attended a degree. More females (53%) than males (47%)
participated in continuing education. Women were more inclined to be motivated by "emigration
considerations". Students undertaking business courses looked for

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considerations".
However, workers released from shrinking secondary industries often become and stay unemployed because of the mismatch between the skills they possess and those required by employers (Lee, 1996, p. 118). The government should undertake a more proactive role, encouraging workers in these sunset industries to equip themselves with new skills in anticipation of changes as there are strong economic implications for investing in lifelong learning, both for the individuals involved as well as the broader society.

**IMPLICATIONS FOR PEOPLE AND THE SOCIETY**

In Hong Kong, as is the case elsewhere, there are strong economic justifications for investing in lifelong learning. Continuing education has a consumption side to it as well as an investment side (Chung et al., 1994, pp. 108-9). Education is purely consumption when it satisfies the needs of the learner without affecting earning capacity over time. Intellectual satisfaction, cultivation of the mind, personal development and higher cultural awareness are some of the consumption benefits associated with education generally, and continuing education specifically. To the extent that continuing education improves the skills and productivity of the learners and therefore enhances their earning capacity, it is an investment in human capital. Human capital theory postulates that skills and knowledge attained through education, as well as monetary capital, are vital to economic growth which promotes general productivity, and are at the same time a form of social investment because society benefits as well as the individual learners (Beder, 1981). Private benefits to the learners are the increased earnings that accrue from their investment in continuing education, while the social benefits of continuing education include not only private benefits which accrue to the individuals, in part because these end up being disbursed through the consumption process, but also include the external benefits which the individuals do not capture or internalize. (Further, there are external consumption benefits and external investment benefits - see Chung et al., 1994, pp. 109-111).

Spillover benefits accruing from education are considerable: an educated person is less likely to be involved in crime, more likely to participate in the democratic process, less likely to become unemployed, and more likely to contribute to the cultural richness of the community. The existence of second chance education produces an appearance of greater equality of opportunity and thus legitimizes the structure of the social systems (Jarvis, 1985, p. 144). Conditions that produce unequal opportunities, such as prejudice and uneven access to resources, should be eliminated. Education is a primary, valid vehicle for upward mobility (Goldthorpe, Lleywellyn & Payne, 1980, p. 232). By improving professional skills and qualifications, citizens can take higher-paid jobs and climb the socioeconomic ladder. Adult and continuing education programming provides a second chance for adults who have been denied or who have declined earlier opportunities for higher education, as well as for those whose need for further education developed later in life.

The second type of external benefits are production related. Lifelong learning promotes productivity and facilitates change in a dynamic society (Knapper and Cropley, 1985, pp. 21-4). Continuous change requires continuous learning - lifelong learning. The most obvious area in which rapid change occurs involves the world of work. Factors such as broad technological progress, the development of new manufacturing techniques, the emergence of new products, and increased knowledge are combining to produce work environments where many job types are ceasing to exist, while others are changing so extensively and rapidly that continually upgrading is de rigueur. Changes of this sort and magnitude clearly suggest that it is necessary for all workers, and most importantly those at fairly humble levels, to completely renew basic job qualifications several times during a normal lifetime.

This requirement for continual upgrading is particularly important in the Hong Kong context. As an open economy, Hong Kong competes on the international stage for trade and investments. Much of Hong Kong's past success relates to its adaptability and willingness to embrace change. Operating in competitive international markets, the Hong Kong work force must be very flexible and highly adaptive with regard to the delivery of the products and services it provides. This need for flexibility and speedy adaptation implies a high rate of skill and knowledge obsolescence as well as significant labour turnover in the local work force (Chung et al., 1994, p. 6). Continuing education programs, flexibly organized, implemented and then discontinued in a relatively short period of time, are responsive mechanisms for reacting to the shifting demand for skills generated by rapid economic restructuring. With greater support and direction from the government, continuing education programming in support of lifelong learning can be an effective tool for reducing skill shortages, a key barrier to economic growth, and in reducing dislocation that may lead to structural unemployment as the skills of displaced workers become obsolete (Chung et al., 1994, p. 112).

**IMPLICATIONS FOR GOVERNMENT POLICY**

In the context of economic justifications for lifelong learning, the Hong Kong Government should review its policies and adopt a more proactive role. Insofar as maintaining stability and promoting general economic prosperity is a prime objective of government policy, educational policy makers must adopt an "education for development" or "education for investment" model as the basis for educational planning. Further, the government must take into account the total needs of the economy, with a view to actively forecasting labour market supply and demand (Psacharopoulos & Woodhall, 1985).

With strong demand for lifelong learning, and continuing education in particular, and little competition from government funded programs, many private institutions have been attracted to the sector. An official estimate of part-time study activity in 1992 identified 750,000 persons taking part (see Chan, 1992), and it was estimated that the volume of trade in continuing education amounted to HK$2.6 billion (see Chan and Holford, 1994, p. 75). In 1993, the non-HEIs placed 2,579 advertisements for students, while overseas educational institutions advertised 2,280 times (Chan and Holford, 1994, p. 53). The market share for private institutions offering continuing education courses is much larger than that managed by the HEIs. However, the lack of government regulation and control on the private education providers compromises quality and raises questions about workers' skills levels. The government should be more active. A good start would be the implementation of standards and
It is worth highlighting that the least educated adults in Hong Kong are among those who are least likely to take advantage of lifelong learning opportunities. The better educated members of society have successfully demanded more educational opportunities, mostly geared to meeting their own needs. If this pattern continues, the gap between the well educated and the poorly-educated will become even wider (see Advisory Council for Adult and Continuing Education, 1983, p. 277).

The notion that continuing education is a side issue, a peripheral activity, is now out-of-date and should be revised (Lai, 1967). At the Conference of Continuing Education Administrators in 1967, it was noted that "grown up people of all levels of education should have as much right to receiving continuing education as younger people have a right to primary, secondary or university education" (Lai, 1967). In considering the social benefits and spillover effects of continuing education, it is critically important to create a shift in attitudes, particularly among the less well-educated, to engender the view that lifelong learning is a continuing and critically beneficial process in life. The government is in the best position to take up the role for promoting and organizing a "community lifelong learning campaign".

The government must ensure that continuing education receives its fair share of attention and resources. In recognizing the value and contribution of continuing education, it is essential that the government establish a comprehensive lifelong learning system which is efficient, flexible and effective in responding to public demand. As already demonstrated, a piecemeal approach will result in imbalance and duplication. An advisory council for continuing education to facilitate and coordinate the efficient use of resources and to identify new areas of need and priorities for research, training and accreditation in continuing education would be a first good step (see Tsang, 1994, p. 134). Arrangements for consultation and collaboration should be developed, with an efficient and effective division of labour and coordination among various providers of adult and continuing education in order to improve professionalism and mobilize resources and expertise to the fullest (Swinbourne & Wellings, 1989, p. 9).

The government has a responsibility to ensure, within the resources available, the provision of a balanced range of educational opportunities to meet the needs of the whole population. With the introduction in 1978 of nine-year free and compulsory education and the gradual expansion of the number of subsidized places in Form Four and Five (Upper Secondary) to 82% of the 15-year-old age group, the educational standard has improved. Hence, it is logical for continuing education to grow at the post-secondary and degree level in the coming decades. As envisaged by the University and Polytechnic Grants Committee in its interim report in 1993, there will likely be an upsurge in the demand for continuing professional education in Hong Kong. "The pressure comes partly from employers, seeking a better or more appropriately skilled work force, partly from individuals hoping to enhance their career prospects, and partly from customers dissatisfied with out-of-date services" (University and Polytechnic Grants Council, 1993, pp. 6-7). As well as funding the public and voluntary continuing education institutions, the government should consider other strategies for supporting formal lifelong learning activities. These could include financial subsidies for those who cannot afford to invest in lifelong learning, permitting tax rebates for course fees, and providing incentives for employers to invest in staff development programs. These measures, though targeted at individuals and firms, will benefit the broader society and help ensure that Hong Kong maintains its competitive position as a world class manufacturing and trading economy while at the same time responding to the needs of all its citizens.
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