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Lifelong Learning in the European Union:

NATURE AND IMPLICATIONS

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List of Acronyms

EEC	European Economic Community
EFR	European Financial Services Round Table
EMU	European Monetary Union
ERT	European Round Table of Industrialists
ETUC	European Trade Union Confederation
EU	European Union
ILO	International Labour Organisation
LLL	Lifelong Learning
KBE	Knowledge-Based Economy
MoR	Mode of Régulation
OECD	Organisation for Economic Co-operation and Development
OMC	Open Method of Coordination
RoA	Regime of Accumulation
UNESCO	United Nations Educational Scientific and Cultural

Abstract

Using a French Régulation Approach, the paper argues that by looking at the underlying regimes of accumulation (RoA), mode of regulation (MoR) and institutional forms, it is possible to explain why LLL emerged at a certain time, who it benefited, and as a result, why certain discourses of individualisation of learning, human capability and social cohesion have been dominant. In addition, it looks at the particular role that LLL has played in trying to implement the European Commission's vision of a particular RoA at the detriment of many RoAs present across the European Union. Specifically, the paper will look at the nature and political implications of LLL in the context of the European Union and argue that the dominant discourse around LLL in the European Commission supports a knowledge-based economy that is closely linked to a finance-led regime of growth.

Relevance to Development Studies

In the past two decades, the development of knowledge-based economies has been touted as the key to future economic growth, particularly for emerging economies such Brazil, Russia, India, China and South Africa. Hence, as countries have identified the need to develop concrete LLL strategy in order to compete in a globalising world, the model of LLL in the European Union has been perceived as an advanced model to emulate. However, these calls to adopt a similar model as the one championed by the European Commission seldom consider the context within which it arose and the implications of such an agenda on its member states. The paper attempts to fill the void by proposing an in-depth analysis of the nature and implications of the EU's lifelong learning agenda.

Keywords

European union , French *régulation* approach, growth regimes, knowledge-based economy, lifelong learning, , regimes of accumulation

Chapter 1
Introduction

In the past two decades, the development of knowledge-based economies (KBE) has been touted as the key to future economic growth, particularly for emerging economies such Brazil, Russia, India, China and South Africa (also known as the BRICS) (Das and Mukherjee Das, 2008: 61). In 2005, the Government of India established the National Knowledge Commission (NKC) which is concerned with making India a leading economic force globally by "establishing a knowledge-oriented paradigm of development" (Das and Mukherjee Das, 2008: 64). However, this drive to develop knowledge-based economies has not been dominated by emerging economies; in fact, in 2000, member states of the European Union resolved to become "the most dynamic and competitive knowledge-based economy in the world" (CEC, 2000a: 2).

What is a common focus on KBE to both developed and emerging countries is an emphasis on lifelong learning (LLL) as a centrepiece of this development strategy. At its 2009 meeting in Pittsburgh, leaders of the G20 stated that "[i]t is no longer sufficient to train workers to meet their specific current needs; we should ensure access to training programs that support lifelong skills development and focus on future market needs" (G20, as cited in ILO, 2011:21). However, the recent statement from the G20 is a reflection of a general worldwide trend within national governments. For example, following the creation of a Lifelong Bureau, the Japanese government approved, in 1990, the "Law Concerning the Development of Mechanisms and Measures for Promoting Lifelong Learning," in which the implementation brought together a number of ministries (including the Ministry for International Trade and Industry), which in turn led to the development of an advisory body on the subject of LLL (Field, 2006: 38). A similar surge of activity occurred in Britain in the late 1990s, with the appointment of a Minister of LLL, followed by a number of policy papers and consultations on the topic which led to the creation of an Advisory Group for Continuing Education and Lifelong Learning" (Field, 2006: 11). Finally, India's National Knowledge Commission, vowed to "build excellence in the lifelong and formal educational systems to meet the knowledge challenges of the 21st century and increase India's competitive advantage in fields of knowledge" (Das and Mukherjee Das, 2008: 64).

Different accounts have been put forward to explain the rise of lifelong learning as not only an educational phenomenon, but also a rallying cry within political circles. In particular, Barrow and Kenney (2000: 191) propose two accounts: first of all, that it may be simply a reiteration of the "ever-present demand for schools and post-secondary institutions to produce more efficient, better trained, and more highly skilled workers." In this instance, the debate around LLL is one centred around the conceptualisation of the educational system and specifically whether or not, it should focus on a more general understanding of education, "which is to say developing intellectual knowledge and understandings," or on training, "which is about developing contextually-bound skills" (Barrow and Kenney, 2000: 191). Based on the North American experience, an alternative explanation of the rise of lifelong learning is rooted in the shifts of the intellectual underpinnings of education, from a tradition that defined it as a vehicle to spread liberal values to all citizens, to one focused on the growth of the individual in the context of a society that prizes freedom and individuality (Barrow and Kenney, 2000: 197-9). A similar explanation within a European context, sees the emergence of LLL as a response to transformations in cultural life where globalisation has led to "the weakening of the old social bonds of class, religion and region, and the decline of traditional family norms," (Green, 1997: Reich, 1991 as cited in Green, 2003: 7) and in light of growing diversity and individual preferences, the LLL can be seen as a way to provide "learning opportunities for each in their own circumstances" (Green, 2003: 8). Hence, in most cases, LLL has been framed around both the need to further develop the skillset necessary for workers to meet the changing labour demands and the need for greater social cohesion in increasingly individualised societies.

At a time when many countries have identified the need to develop concrete LLL strategy in order to compete in a globalising world, the LLL project in the European Union has been perceived as an advanced model to emulate. For example, the Government of India has recognized that "international frameworks for lifelong learning can be adopted in a developing country like India that aims at becoming a knowledge society, where knowledge utilization and knowledge creation capabilities are the driving force in economic and social development" (Das and Mukherjee Das, 2008: 67) and more specifically, Canadian educational organisations have proposed the European Union strategy on LLL as a model to be adopted by the government (Vancouver Sun, 2009). However, these calls to emulate the European model of LLL seldom consider the context within which it arose, in particular how the prominence of the discourse on LLL came at the same time as proposed measures to further entrench the process of European integration. In this instance, the "aim [of lifelong learning] is not to directly change the national approaches to education, as in the Bologna Process, but to find ways to compare and evaluate the systems on the European metalevel" (Tuschling and Engemann, 2006: 454). Hence, although the Commission is not exerting itself directly with respect to lifelong learning, it is using frameworks to compare and contrast various national models, thus exerting pressure on national governments to shape their 'learning' programs to fit within the goals of the Lisbon strategy. The history of the concept of lifelong learning highlights how deeply embedded it is in other processes occurring in Europe, particularly the Lisbon Strategy and the development of the knowledge-based economy. In a first instance, the incorporation of LLL in the Lisbon Strategy acted as a legitimising force for the process of European integration, at a time when the European Union was facing a general legitimacy crisis. An important challenge to integration is to create a European identity. According to Tuschling and Engemann (2006: 452), "instruments of knowledge conceived within the context of Europe's Lifelong Learning are an important part of this process." Thus the role of LLL must be explored in the framework of the Lisbon Strategy, which in turn must be analysed in the broader context of European integration. As Overbeek *et al.* (2006: 3) argue, "the content of the Lisbon process reflects, and at the same time seeks to consolidate, a transformation of what we could call the social purpose underpinning the European integration process."

LLL has also been a foundational piece in the development of knowledge-based economy. The European Union has increasingly been competing with the United States and Japan to become world leaders in this new knowledge-based economy, which some scholars have proposed as an alternative to neo-liberalism (Kim, 2007: 4). At its 2000 summit in Lisbon, the president of the European Union (CEC, 2000a: 1) identified the following challenge:

> The European Union is confronted with a quantum shift resulting from globalisation and the challenges of a new knowledge-driven economy. These changes are affecting every aspect of people's lives and require a radical transformation of the European economy. The Union must shape these changes in a manner consistent with its values and concepts of society and also with a view to the forthcoming enlargement.

As a result, member states of the European Union resolved to become "world-leading knowledge-based society" (CEC, 2007). Concretely, the Lisbon Strategy urges the Council and the Commission to: "give higher priority to lifelong learning as a basic component of the European social model, including by encouraging agreements between the social partners on innovation and lifelong learning" (CEC, 2000a: 8).

Hence, a large portion of the literature on LLL focuses on debates surrounding its implementation, but more rarely does it explore the context, the social forces and the social meaning that shaped and propelled LLL to the forefront. When the context is taken into account, it is often in passage and stocked with assumptions that are not further questioned. This paper will diverge from these debates on implementation and rather ask what is the nature and political implications of LLL, particularly when we look at how lifelong learning is embedded in its broader context? In addition, viewing LLL as a sub-sector within the broader context of the European Union will allow a further analysis of the competing actors, social forces, and projects. Specifically, using a French Régulation Approach, I will argue that by looking at the underlying regimes of accumulation (RoA), mode of regulation (MoR) and institutional forms, it is possible to explain why LLL emerged at a certain time, who it benefited, and as a result, why certain discourses of individualisation of learning, human capability and social cohesion have been dominant. In addition, I will look at the particular role that LLL has played in trying to implement the European Commission's vision of a particular RoA at the detriment of many RoAs present across the European Union. In a first instance, I will provide an overview of the historical events that led to the emergence of the discourse on LLL worldwide and more specifically, in the European Union, while the second chapter will explore the link between LLL and KBE, particularly within in the European Commission's stated goal to develop a 'world-leading' knowledge-based economy in the Lisbon Strategy. The third chapter will provide an overview of the main tenets of the French Régulation approach and the methodology that I propose to use in the analysis. Finally, the fourth chapter will look at the nature and political implications of LLL in the context of the European Union.

Chapter 2
Lifelong Learning

Since the early 1990s, lifelong learning has gained prominence as "something of a meta-discourse in policy terms" and now appears in human resources and education documents of most OECD countries (Green, 2003: 2). However, as Gelpi points out the concept of "lifelong education, fundamentally, belongs to the history of education of all countries, it is not, therefore a new idea… The real revolution today lies in the *popular demand* for lifelong education, not in the idea itself" (Gelpi, 1985: 18 as cited in Livingston, 1999: 163). Many scholars have explained the emergence of lifelong learning as "convergence of a series of scientific and technological innovations to constitute a new technological paradigm" (Field, 2006, 10) or as the result of demographic changes, globalisation, and global economic restructuring (Green, 2003: 3-4). In order to fully understand the current concept of lifelong learning, the following chapter will trace its origins in three distinct phases beginning in the late 1960s.

LLL can be intrinsically tied to the evolution of educational policies, particularly those focusing on adult learning. Prior to the World War I, education was mostly the domain of young men from wealthy families as a stepping-stone to the workforce where many would take over the family profession. However, following the war, the British Ministry of Labour and the US War Department were charged to look into how to reintegrate veterans into civilian society through retraining. As a result, the conception of education changed to incorporate adult learning as there was a new understanding that adults could in fact, "acquire, very quickly, a wide range of new skills and knowledge" (Field, 2006: 48). Similarly, following the Bolshevik revolution, the Soviet Union established widespread educational programs as part of its extension of citizenship rights and more specifically, as a way to create the Socialist Man (Field, 2006: 47). Hence, the beginning of the twentieth century marks the recognition of adult learning within governmental policy.

The first phase of LLL per se spans from the late 1960s to the mid-1970s and can be characterised as the brainchild of intergovernmental think tanks. In 1972, the United Nations Educational, Scientific and Cultural Organisation (UNESCO) published *Learning to Be*, commonly referred to as the Faure Report, a report promoting lifelong education which was heavily influenced by the French concept of *éducation permanente* and embraced humanistic ideals of emancipation of the individual and creating a better society (Nijhof, 2005: 403). During the same period, shaped predominately by ideas of the human capital approach (Field, 2006: 14), the Organisation for Economic Cooperation and Development (OECD) began using the term 'recurrent education' within its strategy documents (Griffin, 1999: 335). Specifically, the OECD argued for paid educational leave, which would supposedly "promote a culture for all, helping to promote both increased competitiveness and greater social equality" (OECD, 1973 as cited in Field, 2006: 14).

Dehmel (2006: 50) referred to the period from mid-1970s to 1990s as the "valley of decreasing interest," where "international and intergovernmental bodies said relatively little on the topic, and the idea of lifelong learning with its humanistic ideals almost disappeared from the policy agenda." According to Bélanger (1997), this decline can be attributed to the end of the post-war prosperity and a deterioration of the welfare state (viii). However, Lee, Thayer and Madyun (2008: 448) provide a more compelling explanation when they describe these years as "an important formative period out of which emerged a neo-liberal discourse on lifelong learning." During this period, the concept of lifelong education, based on humanistic ideals, continued to be championed by Gelpi, the chief of UNESCO's lifelong education division, while "the concept of self-directed learning discussed during the mid-1970s to the early 1990s acted unexpectedly as a theoretical rationale for migrating international discourse on lifelong learning to the neo-liberal lifelong learning discourse of the 1990s and 2000s"[1] (Lee, Thayer & Madyun, 2007: 449). Such a shift is apparent an influential report produced in 1979 by the Club of Rome and entitled *No Limits to Learning*, which called for the "broad-based mobilization of the creative talent inherent in all human beings" as the "only way to allow then to understand, adapt to, and make progress in an increasingly complex world" (Longworth, 2003: 6). Hence, far from disappearing, the concept of LLL was being reshaped based on competing agendas: the Social Democratic agenda and the neo-liberal agenda.

The third phase that has shaped the concept of LLL began in the early 1990s until now. According to Field (2006: 35), the new concept of LLL has also been shaped by the ideas of new public management, particularly the belief that governments are no longer the best delivery vehicle for LLL programmes. As such, "individual behaviour and attitudes are at the heart of the new approach" (Field, 2006: 35), as evidenced in the German's supporting document for the European Year of Lifelong Learning which states that:

> Learners themselves will have to choose and combine learning processes and strike the right balance between available routes of learning in a way that meets their specific needs. In other words, they will be largely responsible for directing their learning themselves. (Dohmen, 1996: 35)

The last section provided a general overview of the three phases that have shaped LLL and have resulted in most countries adopting policy measures to implement such a program around the same time period. The following section

[1] In scholarly discussion, the concept of 'self-directed' learning gained prominence during the mid-1970s to 1990s and placed the learner at the centre of the education model, so that the focus revolved around the "self-regulative character of learners, learners exercising control over learning conditions, and the stress of learners' experience" (Lee et al., 2008: 49).

will provide further details on how LLL was shaped more specifically in the European Union.

2.1 Lifelong Learning: The European Context

According to Brine (2006: 650-657), the shaping of the concept of lifelong learning within the European Union can be broken down into three distinct periods: the years leading up to the Lisbon strategy (1993-1999), the Lisbon period (2000-2002), and the post-Lisbon and the Lifelong Learning Resolution (2003-2005).

The resurgence of LLL into the international limelight was in part as a result of a push towards a Single European Market and issues with high unemployment. The 1992 Maastricht Treaty placed the European Union at the forefront of European integration, particularly in education and training, and led to a renewed interest in the concept of LLL. It is during the years approaching Lisbon that the "key themes and concepts of the knowledge economy were introduced and strengthened: economic growth, global competitiveness, the technological revolution, the dual labour market and dual society, and of course, lifelong learning" (Brine, 2006: 650) In 1993, the third Delors Commission published its White Paper entitled *Growth, Competitiveness, Employment*, which outlined the need for the EU to "become globally competitive, especially in the field of information and communication technology," (Brine, 2006: 651) and suggested lifelong learning as an essential tool for promoting employment (CEC 1993: 16). This shift was further noticeable in the 1995 White Paper, *Teaching and Learning: Towards the Learning Society* (CEC, 1995), where LLL was explicitly linked to economic growth (Lee et al., 2008: 452-3).

A large part of the balancing act for the European Commission was using lifelong learning to further European integration while at the same time, ensuring that it did not contravene to national jurisdiction in the fields of vocational training and education as outlined in article 128 and article 235 of the 1957 Treaty of Rome (Hake, 1999: 55). Hence, "in order to secure its legitimacy as regards lifelong learning policy, the Commission has increasingly emphasized 'institutional learning', i.e. from others, as opposed to 'institutional teaching'" (Lee et al., 2008: 452). This balancing act also led the Commission to define its role as one of "providing best practices, or models, found across the member states rather than as suggesting another policy experiment," (Lee et al., 2008: 454) during the implementation of the 1996 European Year of Lifelong Learning (EYLL).

As a result of the backlash of some member states to the overly economic focus of lifelong learning in the 1995 White Paper, the discourse within the Commission was altered to pay lip service to the more liberal democratic tradition on lifelong education (Papadopoulos, 2002). Hence, the 1997 White Paper not only focused on economic growth and job creation, but also on social inclusion and the promotion of active citizenship (CEC, 1997). According to Lee (2008: 457), "the 1997 shift in the discourse within the EU […] can also be understood in the context of the EU's adoption of an all-embracing stance that merges UNESCO's and the OECD's perspective." However, according to Field (2000), the main contributions of all three organisations, the Commission's 1995 White Paper, UNESCO's *Learning – the Treasure Within* (1996: 8) and the OECD's *Lifelong Learning for All* (1996), "in essence, […] all said much the same."

The 1997 Treaty of Amsterdam further entrenched the concept of LLL, by committing Member States to "the development of a skilled, trained and adaptable workforce and labour markets responsive to economic change." In addition, the Treaty defined knowledge economy as "one based on information and communication technology and on knowledge construction and transfer, hence reliant on high knowledge-skills (Brine, 2006: 659). It is also beginning in this period that LLL became a pillar of the European Employment Strategy (Dehmel, 2006: 53). In particular, the European Council met in Luxembourg in 1997 to further develop the employment strategy, which resulted in a shift from a focus on employment to one on employability, where individuals must become in "a state of constant becoming, of readiness for employment" (Brine, 2006: 652). This shift was further apparent at the 1998 EU Vienna Summit, which defined employability, entrepreneurship, adaptability and equal opportunities as the four key elements of LLL (CEC, 1999).

In 2000, the Lisbon European Council reiterated the crucial role of LLL by making it central to its strategy to "make Europe the most competitive and dynamic knowledge-based society in the world" (CEC, 2000a, § 33). The Lisbon Strategy came at a time when Europe's economy was lagging behind those of Japan and the United States and the European Union itself was facing a legitimacy crisis. On the one hand, the Lisbon Strategy for Growth and Jobs aimed to tackle the problems of an ageing population and globalisation by making lifelong learning a central piece of building a knowledge-based economy while on the other, it aimed to address the problem of legitimacy by proposing the 'open-method of coordination' (OMC), which measure a country's performance on a policy area against a set of established benchmarks established by the Commission (Apeldoorn, 2006: 3-13).

Subsequently, the 2000 *Memorandum on Lifelong Learning* further reaffirmed the role of LLL in building a strong knowledge-based economy (KBE) and stated that "*lifelong learning* is no longer just one aspect of education and training: it *must become* the guiding principle for participation across the full continuum of learning contexts" (CEC, 2000b: 3). The Memorandum provided the incentive to launch a Europe-wide consultation on lifelong learning in order to develop a ten-year work programme which was adopted "jointly by the Education Council and the Commission and approved by the European Council Meeting in Barcelona" (Dehmel, 2006: 54).

In 2001, the Commission called for a 'European Area of Lifelong Learning,' in order to meet the goal set out in the Lisbon Strategy of developing a knowledge-based economy. However, in response to criticisms that the Memorandum had place too great an emphasis on employment and the labour market (Brine, 2006: 655), a *Communication* was issued redefining LLL to include "all purposeful learning activity, undertaken on an on-going basis with the aim of improving knowledge, skills and competence" and "all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective" (CEC, 2001). Interestingly, whereas one of the main goals of the Lisbon Strategy was focused on the knowledge-based economy, the language in the Commission's *Communication* was changed to read that the European Union would strive to "become the most competitive and dynamic knowledge-based society in the world (CEC, 2001a: 9). This shift from knowledge-based economy to knowledge-based society was reaffirmed when the heads of member states issued *Resolution of the Council* (CEC, 2002), which no longer contained any references to knowledge-based economy, but instead only referred to knowledge-based society (Brine, 2006: 656).

In 2004, the Commission issued a *Communication* (CEC, 2004) which provided an update on the Employment Strategy, in which the importance of LLL was reaffirmed but where the whole concept 'knowledge,' be it society or economy, was noticeably absent (Brine, 2006: 657). The subsequent proposal for an integrated Lifelong Learning Action Programme could be found in the Commission's *Memorandum*, where it outlined the programmes that would form its lifelong learning policy (these programmes included Comenius, Erasmus, Leonardo da Vinci, and Gruntvig). Though in this document, knowledge-based economy and society are used, neither term nor lifelong learning itself is defined (Brine, 2006: 658).

Finally, in 2005, the Commission published a review of its program in light of the goals outlined in the Lisbon Strategy (CEC, 2005). In response, in May 2006, the Commission launched its Lifelong Learning Programme, its centrepiece framework for training and education. In particular, it claims that the role of its policies is to support national actions and help address common challenges such as: ageing societies, skills deficit among the workforce, and global competition" (CEC, 2010). In 2008, the European Parliament recommended the establishment of the European Qualifications Framework for Lifelong learning, which essentially shifts the emphasis from 'learning inputs' to 'learning outputs,' thus focusing on what the learner knows and is able to do rather than the process of learning itself (European Commission, 2007).

Chapter 3
Knowledge-Based Economy

In order to fully understand the emergence of LLL in policy circles in the last decades, it is essential to understand its close link to the development of a KBE. The following chapter will therefore provide a brief overview of how the concept of KBE has emerged, its link to information and technology development, and finally how it relates to LLL in the context of the European Union.

The current conception of knowledge economy finds its origins in the works of Machup (1962), Bell (1974), Porat and Rubin (1977) and more recently in the OECD's publication entitled *Knowledge Based Economy*, which defines it as:

> … directly based on the production, distribution and use of knowledge and information. This is reflected in the trend in OECD economies towards growth in high-technology investments, high-technology industries, more highly-skilled labour and associated productivity gains (OECD, 1996: 3)

According to Gobin (2006), the term knowledge-based economy was championed by the OECD as a way to put pressure on policymakers to further incorporate science and technology into the economy (Roberts, 2009: 268). This conceptualisation of knowledge economy has been resisted by some international organisations, particularly UNESCO (2005: 159), that have put forward the concept of knowledge societies as a way to recognize the diversity of knowledges found worldwide and to "stress that there are many historical and contextual dependent possibilities for constructing future knowledge societies" (Servaes and Carpentier, 2006: 5). However, since its introduction into mainstream discussions in the European Union, both the terms 'knowledge economy' and 'knowledge society' have been used interchangeably and have been mainly tied to the development of technology as a way to promote economic growth.

In addition, the concept of knowledge economy has also increasingly been used synonymously with the concept of information economy despite important distinctions. According to Boyer (2004b: 131), an information economy is "based on technological innovations that tend to lead to a fall in information-processing and transmission costs as a result of using particular equipment or software," whereas a knowledge-based economy "seeks to analyse and understand natural, physical, chemical, biological, social and economic phenomena" and "is concerned with scientific, or more generally conceptual, innovations." Though they have been "mutually supportive discourses" (Leye, 2007: 75) and have increasingly been intertwined in "people's representations of innovation and growth trends" (Boyer, 2004b: 143), such portrayals "confuse information, knowledge, know-how, and competency, all of which are distinct factors in potential alternative growth-model ideal types" (*Ibid*: 140).

However, such intertwined depictions of information economy and KBE have gained greater prominence in policy documents of the European Union since early 2000, as evidenced by the release of the *Lisbon Strategy for Growth and Jobs*, which viewed the shift to a digital KBE based through the development of an information society as a key component in defining Europe's place in a competitive 'globalising' world and to build greater social cohesion (CEC, 2000a: 1-3). As part of this undertaking, two key priorities were identified: a European research area (*Ibid*: 2000) and a European space of lifelong learning (CEC, 2001). LLL therefore plays an important role in the shift towards a KBE as it supports the Council's call to modernise the European Social Model in order to build greater social cohesion. In order to meet the demands of this 'new economy,' changes are required within the social fabric of member states, specifically, the increased flexibilisation of the labour market so that workers can constantly adapt to the changing economy to maintain employability, which in turn requires the "acquisition of new skills as part of 'life-long learning'" (Apeldoorn, 2009: 29).

Finally, the KBE (and the information economy) has been celebrated as fundamentally shifting the economic relations whereby human produced knowledge and information replace capital as the main economic driver, hiding "the fact that there may be more continuity than change, as existing power relations abide" (Leye, 2007: 77). LLL has played an important part in this conceptualisation of a fundamental societal shift because although the discussions on LLL and KBE originated in different contexts, they have been presented as interdependent in the European Council's drive to push to have a "competitive, dynamic and knowledge-based economy" (CEC, 2000a: 3). The following sections will further explore the interaction between factions of capital and labour that have led to the rise of this interdependent KBE and LLL agenda and more importantly, the implications of such a project.

Chapter 4
Theoretical Framework and Methodology

In the last four decades, various schools of thought have shaped mainstream economics: monetarism in the 1970s focused on the issue of money, the orthodoxy in the 1990s turned their efforts to getting the price right, whereas the 1990s saw the rise of new institutionalism that emphasised the importance of institutions. However, despite these differences, all share the fundamental assumptions that humans are self-interested rational beings (*homo economicus)*, that there exists a concept of economic equilibrium, and finally that "economic agents interact through the sole intermediary of groups of interdependent markets" (Boyer, 2002: 3-4). During the same time period, the French *régulation* approach has emerged to provide an alternative way to analyse "structural change as well as periods of rapid and regular growth" (Boyer, 2002: 5). Hence, at its core, *régulation* theory attempts to explain the nature of capitalism and in particular, why it continues to operate despite successive crises (Boyer, 2004: 5-6). Specifically, two founding questions guide the work of regulationists: firstly, the impact of institutional forms on the regime of accumulation (RoA) and the mode of regulation (MoR) and secondly, how the internal dynamics of capitalism, which are inherently crisis-prone, lead to different types of crises (Boyer, 2003: 15). The following chapter will describe the strengths of such an approach when analysing LLL in the context of the European Union and its main concepts. Finally, the methodology guiding the analysis of LLL will be introduced.

4.1 Relevance of *régulation* theory

One of the strong points of *régulation* theory is the attention it dedicates to the role of institutions, particularly, those required to sustain a capitalist economy. *Régulation* theory diverges from many new institutionalist analysis, particularly rational choice institutionalism, as it seeks to understand how the characteristics of institutional forms can both support a RoA and cause it to enter into structural crises by analysing institutions over a long time frame (Boyer, 2003: 3). It also diverges from mainstream economics by proposing that institutions do not follow a logic of rationality and efficacy, but are rather result "from conflicts between social groups, arbitrated by political and legal processes" (Boyer, 2002: 17) and "are not merely a cover for pre-existing economic relations, they in fact enable their conception and development" (Lyon-Caen and Jeammaud, 1968: 9). Therefore, in this instance, institutions are essentially political projects rather than economic ones (Boyer, 2003: 4). The importance allocated to institutions, mainly through the analyses of how institutional forms interact with the RoA and the MoR throughout time, allows us to move beyond the difficulties encountered by general economic models in explaining strong variations between national contexts (Boyer, 2002: 3), and rather, looks at how "every society displays the economic evolution and crises that correspond to its structure" (Boyer, 2002: 15).

In addition, *régulation* theory assumes that "accumulation has a central role and is the driving force of capitalist societies" (Boyer, 2008: 2) and views all human activity, including economic activity and wage relations, as essentially a complex set of social relations (Lipietz, 1987: 2). It draws heavily on Polanyi's concept of embeddedness "which expresses the idea that the economy is not autonomous, as it must be in economic theory, but subordinated to politics, religion, and social relations" (Block, 2001: xxiiii). Furthermore, it assumes that these social relations are contradictory and inherently crisis-prone and consequently, focus their research on why during certain periods of time, there are moments of stability. Thus, the theory's underlying principle of embeddedness allows for the in-depth analysis of both the roots of change in troubled times and continuity in periods of stability.

Another innovative feature of *régulation* theory lies in its current evolutionary research agenda, which focuses on the technical aspects that explain "the reasons for alternations in phases of prosperity followed by depression" (Freeman, 1982 as cited in Boyer, 2002: 19) and the "interlocking nature of the technological, social and economic factors from which innovation originates" (Nelson, 1993, as cited in Boyer, 2002: 19). As such, it challenges technological determinism, where "the economy would merely adapt to changes in technology" (Amable, 2002: 161) and instead explain how technological advances and innovative systems interact with a number of other factors underpinning institutional forms to shape the MoR. Once again, this interaction is not shaped by rationality and efficacy, which as a result allows for a variety of modes of régulation (Boyer, 2004: 44). Thus, the advancement of information and communication technologies does not require a specific set of institutional forms, but alternatively can emerge within different arrangements (Boyer, 2003: 4).

The evolution of *régulation* theory shows that while the school of thought finds its roots in Marxist theory, it was established as both a critique of *homo economicus*, but also of structuralism (Boyer and Saillard, 2002: 36). As such it is rather described as a Marxian approach. On the one hand, two important concepts from Marx are retained, specifically that "capital needs to be defined in the wider sense of the term" and secondly, that "capital accumulation is an essential factor of growth, notably because it causes changes in modes of production and lifestyles; but capital accumulation is unstable and often leads to social tensions" (Vidal: 2001: 36). However, *régulation* theory diverges strongly from Marxist theory of state monopoly or structuralist Marxist thought that perceives structures as neutral and non-social (Lipietz, 1987: 5) and believes that these structures reproduce themselves spontaneously (Delorme, 2001: 2), which led to what Vidal (2001: 27) refers to as "fatal determinism attached to trends in the forces of production." Thus, *régulation* theory overcomes this determinism by analysing "the way in which transformations of social relations create new economic and non-economic forms, organised in structures that reproduce a determining structure, the mode of production" (Aglietta, as cited in Boyer, 2002: 1).

In short, régulation theory provides an in-depth analysis of the nature of capitalism and its continuous transformations by specifically looking at the role of institutions, by applying the concept of embeddedness of the economy in its broader social relations, by using a evolutionary process to look at how technology and innovation interact with institutional changes, and finally, by overcoming the determinism present in structural Marxism. As such, the theory is useful to analyse how a certain conceptualisation of LLL, which supports one model of growth, has been legitimized in institutional forms, both at the national and supranational level, despite the presence of a multitude of regimes of accumulation (Boyer, 2000: 319).

4.2 Critiques of Regulation Theory

As *régulation* theory has gained prominence, it has not been without its critiques. For the purpose of this paper, I will briefly address two of these critiques: first, that there is an inherent functionalism that produces reductionist explanations of "modes of regulation for stabilising capitalist development" (Danielzyk and O□enbr□ge, 2001: 9) and secondly, that its emphasis on the nation state as a starting point of analysis doesn't allow for an in-depth analysis of "social capital and its fragments (individual capitals)" on a transnational scale (Yaghmaian, 1998: 244). The last critique can be extended in terms of the relevance of using *régulation* theory when studying a supranational body such as the European Union. As a response to the first critique, Boyer (2002: 2) states that unlike functionalism, *régulation* theory's central issue "is the viability of a set of institutionalised compromises when there is no a priori reason why they should define stable accumulation regime." Increasingly, *régulation* theory has addressed the second critique by evolving "towards a conception that tries to integrate an appreciation of relative regional and local autonomy, the influence of international institutions and their role in overall economic régulation, and the maintenance of national elements" (Saillard, 2002: 183).

4.3 Regime of Accumulation (RoA)

Fundamentally, *régulation* theory studies the system in place when capitalism reproduces itself in a relatively stable manner (Lipietz, 1987: 3). This is what Boyer (2002: 38) identifies as the regime of accumulation (RoA), which can be analysed by looking at processes of capital creation, circulation, and distribution, which in turn allow a further analysis into fractions within capital and labour. Specifically, the RoA can be defined as the "set of regularities that ensure the general and relatively coherent progress of capital accumulation, that is, which allow the resolution or postponement of the distortions and disequilibria to which the process continually gives rise" (Boyer, 1990: 35-6).

These regularities concern:

> "(i) the pattern of productive organization within firms which defines the wage-earners' work with the means of production;
>
> (ii) the time horizon for decisions about capital formation;

(iii) the distribution of income among wages, profits and taxes;

(iv) the volume and composition of effective demand; and

(v) the connection between capitalism and non-capitalist modes of production" (Brenner and Glick, 1991: 47).

There are two factors that allow us to identify the RoA: the nature of accumulation and the nature of consumption. The nature of accumulation can either be one of extensive accumulation, which "relates to the capitalist development that conquers new branches and new markets, spreading its production relations to new spheres of economic activity, without however altering the conditions of production and the efficiency of labour or capital in any significant manner" or one of intensive accumulation where "the conditions of production are systematically transformed with a view to increasing the productivity of labour" and where "new investments are primarily in the form of an increase in capital stock per worker" (Juillard, 2002: 154). The nature of consumption looks at workers' consumption norms and collective expenditures (Lipietz, 1986: 14) and depends on the level of integration within the capitalist system (Boyer, 2004: 55).

Accordingly, four historical forms of RoA can be identified: extensive accumulation, intensive accumulation, intensive accumulation with consumption and extensive accumulation with consumption. The regime of extensive accumulation, which characterised late eighteenth and early nineteenth century Britain, occurs when "growth takes place predominantly on the basis of artisanal productive techniques via the application of methods of lengthening the working day and intensifying labour, as well as expanding the size of the labour force" (Brenner and Glick, 1991: 49), whereas in an intensive regime of accumulation, as exemplified in the American economy of the nineteenth century, growth is marked by technical innovation through "Taylorist methods of rationalization" which involved the "acceleration of the mechanical processes of task completion" and "the integration of mechanized segments of the labour process that had previously been separated" (Brenner and Glick, 1991: 76). The regime of intensive accumulation with mass consumption is the one that received much of the early attention of regulationist, particularly in the works of Aglietta (1976). It is characterised by a social pact between labour and capital, which, through the expansion of credit and the development of the welfare state, "allowed the growth of workers' consumption to meet the requirements of intensive capital accumulation" (Brenner and Glick, 1991: 87). Though there is some debate among regulationists about the nature of the contemporary RoA, there is an emerging consensus among the Parisian school which Juillard (2002: 155, 158) sums up by asserting that in "the last twenty years the United States has experienced growth in the form of extensive job creation and only a slight growth in productivity – in fact some years there has been none – suggesting renewed importance on the extensive dimension of growth," but still "centred on mass consumption but differentiated by income disparities."

The RoA should not be confused with growth regimes, which are defined by "the main source of national inform and by a form of distribution for this income" (Boyer and Freyssenet, 2000: 7). A growth regime is a historical process, oftentimes unique to each country and has distinct phases accompanied by changes in institutional forms (Petit, 2003: 2). As a result, one type of RoA can encompass a variety of growth regimes. For example, though the thirty years following World War II saw the rise of an intensive regime of accumulation with mass consumption around the world, there were numerous variations of growth regimes: a Beveridgian growth regime in Germany and Japan, a Social Democratic growth regime in the Scandinavian countries, a Fordist growth regime in France and the United States, and a Keynesian growth regime in many developing countries. (Boyer, 2001: 54).

4.4 Mode of Regulation

The second important point of analysis in *régulation* theory is the mode of *regulation* (MOR), which "established a set of procedures and individual and collective behaviour patterns which must simultaneously reproduce social relations through the conjunction of institutional forms which are historically determined and supported by the current accumulation regime (Boyer, 2002: 41). There is a dialectical relationship between the RoA and the MoR, where agents shape or reinforce an accumulation regime by orienting themselves "through constraints, common references, procedures and patterns that transmit or support collective arrangements of rules, conventions and organisations" (Orléan, 1994 as cited in Boyer and Saillard, 2002: 36-7). However, through norms and rules found in institutional forms, the MoR ensures "the compability over time of a set of decentralised decisions, without the economic actors themselves having to internalise the adjustment principles governing the overall system (Boyer, 1990: 43). Finally, the mode of development is "the conjunction of an accumulation regime and a type of régulation" (Boyer and Saillard, 2002: 341).

In the last century, two main historical forms of MoR can be identified in advanced capitalist societies: the competitive mode of regulation and the monopolistic mode of regulation. The competitive mode of regulation, as exemplified by the French capitalist economy of the late nineteenth, early twentieth century where "there is craft control and the competitive determination of prices and especially of wages" (Brenner and Glick, 1991: 47), whereas in the monopolitistic mode, epitomized in the thirty years following World War II, "there is scientific management, an oligopolistic system of pricing, and, most characteristically, the determination of wages through a complex system of capital–labour and governmental institutions—the social regulation of the mode of consumption" (Brennar and Glick, 1991: 47). Although the monopolistic mode of regulation entered a state of crisis at the end of the 1960s, there remains a debate as to its successor. The deepening of the internationalisation and liberalisation processes has accentuated the importance of competition between states, particularly as a result of financial mobility. However, this potential competitive mode of regulation differs substantially to the one at the end of the nineteenth century as the state now plays an interventionist role (Petit, 1998; Boyer, 2004: 49). Others have argued that there has been an emergence of a mode of regulation based on the tertiary sector, where the services industry is reshaping the institutional forms through the fragmentation and individualisation of working conditions and contracts (Boyer, 2004: 50). Finally, a third mode of regulation, based on financialisation, has been proposed based on financial innovations and the opening of developed and developing countries to international capital. This variety of hypothesis put forward highlight the uncertainty associated with the emergence of a clear mode of regulation during periods of structural changes (Boyer, 2004: 50).

4.5 Institutional Forms

Régulation theory also studies how the regime of accumulation and the mode of regulation interact with five institutional forms: wage-labour nexus, monetary regimes, competition, nature of the state, and the international order. In this instance, institutions can be defined as the "rules of behaviour they both guide the conduct of actors in known situations and help actors to co-ordinate their actions in new situation. They are carriers of history where we can track down the meaning features backing the growth regime" (Petit, 2003: 3). In order for institutions to be sustainable, there must be a certain level of societal consensus that supports the way in which institutions are constructed. As a result, institutional forms vary widely from one national context to another and the "hierarchy of institutional forms is neither permanent nor universal" (Villeval, 2002: 294). Delorme and André (1983: 672-4) refer to this compromise as the result of "tension and conflict between socio-economic groups," in which institutions "impose themselves as frameworks in relation to which the population and concerned groups adapt their behaviour."

As institutional forms cannot be analysed independently from one another, the regulationist concepts of institutional complementarity and hierarchy provide an important framework to examine "the conditions under which the conjunction of a set of institutional forms and modes of governance define a long-term socio-economic evolutionary path" (Boyer, 2002: 329). Institutional complementarity refers to the "configuration in which the viability of an institutional form is strongly or entirely conditioned by the existence of several other institutional forms, such that their conjunction offers greater resilience and better performance compared with alternative configurations" (Boyer and Saillard, 2002: 335), whereas institutional hierarchy refers to a "configuration in which, for any given era and society, particular institutional forms impose their logic on the institutional architecture as a whole, lending their dominant tone to the mode of régulation" (Boyer and Saillard, 2002: 339). Despite seeming contradictory at first glance, both concepts work together to explain the shifts in institutional forms, by highlighting how they mutually support one another and how changes lead to certain institutional forms gaining predominance over the others (Boyer, 2002: 331).

Monetary Regime

The monetary regime looks at the "fundamental social relation (of a given country and era) that establishes the merchant subjects" and looks at how money "is not a particular type of commodity, but a means of establishing relations between the centre of accumulation, wage earners and other merchant subjects" (Boyer, 1990: 37). According to Guttmann (2002: 57), the "major contribution of *régulation* theory to monetary theory lies in its understanding of money as a social institution." The historical changes of the central characteristics of money, particularly its forms, its issuing modalities, and circulation dynamics have not only transformed, but have also shifted the way in which our economic system operates. Specifically, the monetary regime is defined by the institutional arrangements that shape it: monetary policy (central bank management of money creation), financial policy (regulation of the financial sector), price stability, mechanisms to manage financial crises and movement of money between countries. Finally, according to regulationists, there is a high correlation between drastic changes in the monetary regime and changes in the RoA (Guttmann, 2002: 58).

Wage-Labour Nexus:

The concept of the wage-labour nexus put forward by regulationist research has provided a comprehensive framework to analyse the relationship between capital and labour relations. Whereas the majority of orthodox economic theory view the labour market as a product market and orthodox Marxist theory stipulates that labour is the only commodity to generate surplus and its value "is governed by the relentless competition exercised by the army of unemployed workers" (Boyer, 2002: 73), r*égulation* theory looks at how the wage-labour nexus has undergone numerous changes throughout history in order to reinforce the capitalist mode of production. Hence, *régulation* theory refers to the wage-labour nexus as "the process of socialisation of production activity under capitalism; it is what becomes the wage-earning class" (Boyer, 2002: 73-4), and defines it by "the complementarity of the institutions framing the employment contract and their compatibility with the current mode of *régulation*" (Boyer, 2002: 73). The wage-labour nexus can be defined by the "type of means of production; the social and technical division of labour, the ways in which workers are attracted and retained by the firm; the direct and indirect determinants of wage income' and lastly, the workers' way of life" (Boyer, 1990: 38). Finally, according to Boyer, the wage-labour nexus holds a privileged place in the analysis of institutional forms, as "it describes the type of appropriation of surplus in the capitalist mode of production" (Boyer, 2002: 39), thus it remains central to the overall functioning of the economy (Bertrand, 2002: 81). Finally, the wage-labour nexus is complementary to the other institutional forms, as it can either be shaped or influence the formation of other forms such as the monetary regime or the forms of competition (Boyer, 1993; Boyer, 2002: 74).

Form of Competition:

Within régulation theory, the institutional form of competition looks at how distinct units of accumulation that have their own independent internal decision-making mechanism, interact with one another. Thus, it explores some of the structural or institutional transformations, predominantly the transformations that emerge in firms' relationship to one another, that highlight trends in the RoA (Boyer, 1990: 39; Hollard, 2002: 102-6). In order to analyse the forms of competition that underpin a stable RoA, it is essential to consider the "forms of production, organisation (relations within and between companies), market forms (rules of operation), management rules, the objects of competition (services, goods or information) and the co-ordination between companies and the financial system" (Hollard, 2002: 106-7). Though these should not be viewed as restrictive, Boyer (1990: 39) emphasizes two main forms of competition: monopolistic and competitive. A monopolistic form of competition prevails when "certain rules of socialisation prevail before production through the maintenance of a social demand whose quantity and composition are largely geared to supply," whereas a competitive one becomes dominant when "competitive mechanisms are at work when the fate of privately produced goods is determined by a confrontation on the market after production." Finally, it is impossible to consider forms of competition independently from other institutional forms, particularly the monetary regime and the wage-labour nexus (Hollard, 2002: 101-2).

Form of Insertion into the International Regime:

As the first research projects of regulationists focused primarily on Fordism which "was one of the most nation-centred regimes of accumulation in history" (Lipietz, 1987: 7-8), little attention was channelled to the role of international regimes. However, recent studies have broaden the scope of the *régulation* method by enshrining the forms of insertion into the international regime as one of the five institutional forms. In this instance, a country's insertion in the world order is "defined by the set of rules that organise the nation state's relationship with the rest of the world" (Boyer, 1990: 40). This can be studied through the analysis of international exchanges (commodities, direct investment, capital inflows and external deficits) and the coherence of institutions in place that shape international relations (Boyer, 1990: 40; Vidal, 2002: 110).

Form of State

Régulation theory places an emphasis on the form of state, particularly the interaction between the state, which is described as the "set of institutions with the prerogatives of public power via the central state, local administration and social security organisations" (Delorme, 1991 as cited in Delorme, 2002: 117), and the economy, which is defined as both the "social activity of the production, distribution and use of the material conditions of existence" and the "discourse and knowledge about this field of activity" (Delorme, 2002: 116). However, it is important to highlight that despite a certain degree of stability that allows each of these sets of institutions to function, there lays inherent tensions between different factions. As such, institutions should essentially be seen as a set of processes (*Ibid*: 117) and institutional forms as institutionalised compromises, which "once they are made, create rules and patterns in the evolution of public spending and revenue, as well as the orientation of regulations" (Boyer, 2002: 339). According to Delorme (2002: 119), three different types of logic govern state actions: coordination (where institutions are in place to guide interaction), legitimisation (which refers to the norms and values that shape actors' reality and in turn, allows these actors to support institutions despite failures) and finally, the power of constraint linked with sovereignty which allows the state to have final say in decision-making.

4.6 Crises

In addition to analysing the institutional forms that interact with the MoR and the RoA to support economic growth, *régulation* theory also explores the dialectical relationship between moments of growth and crises (Boyer, 2004: 75-6). In particular five different types of crisis are identified in order of severity: exogenous, endogenous, crisis of MOR, crisis of ROA, and crisis of the mode of production (Boyer, 2002: 43-4). The first two crises are inherent and recurring in capitalist societies. An exogenous crisis occurs when external events, such as natural disasters or external wars, disturb economic reproduction but do not alter the economic system of creation, distribution or circulation, thus the RoA and the MoR remain intact. An endogenous or cyclical crisis occurs when internal social forces lead to disruptions, but again do not alter the RoA or the MoR. Examples of such a type of crisis includes passive revolutions and arguably, some of the Arab Spring uprisings where changes in heads of states have not lead to fundamental changes in the overall regime. On the other hand, the next three crises are much more substantial as they are structural. A crisis of MoR occurs when there is a problem of social validation of the RoA and more specifically when "the mechanisms associated with the prevailing mode of régulation prove incapable of overcoming unfavourable short-term tendencies, even though the regime of accumulation was at least initially viable" (Boyer, 1990: 52). During crises of the MoR, institutional forms are disrupted and weakened, economic predictions are often erroneous as they are based on past patterns, and greater tensions emerge leading to proposals in changes of the institutional forms. During a crisis of RoA, there is a complete reshaping of the economic foundation, particularly through transformations in the system of production. It is distinct from a crisis of MoR "because when an institutional form reaches its limits there is negative spillover upon others and so the disequilibria are propagated from one sphere to another" (Boyer and Saillard, 2002: 336). Finally, a crisis of the production mode occurs when "an economic formation reaches the limits of one arrangement of institutional forms, precipitating challenges to and the abolition of the most fundamental aspects of the prevailing set of social relations (Boyer, 1990: 58). An example of such a crisis would be the end of feudalism or the fall of the Soviet regime (Boyer and Saillard, 2002: 44).

4.7 Methodology

The rise of the idea of LLL in the European Union raises important questions for the future of educational policy making. However, much of the current literature focuses on debates of concepts of LLL or of its implementation. This paper is therefore a critique of this mainstream literature, as it will assert that LLL cannot be understood without understanding the broader context of capitalism and more specifically, the nature of the capitalism that has given rise to the idea of LLL. In the following section, I will outline some of the main schools of thought that focus on the form of LLL and then specify the aim of the paper and outline the methodological tools proposed by the *régulation* theory.

According to Robeyns (2006: 72), there are "three normative accounts that can underlie educational policies: rights, capabilities and human capital." The human capital approach, championed by University of Chicago scholars Becker (1993) and Schultz (1963), argues that " the quality of human capital is key to national wealth and has had important implications for education as one of the principal forms of investment in its accumulation" (Schultz, 1961; Becker, 1964, as cited in Preston and Dyer, 2003: 429). This account has served as a basis for the development of educational policy in many parts of the world as can be exemplified in the federal Ministry of Human Resources and Skills Development, which is responsible for overseeing post-secondary education in Canada (HRSDC, 2011). Critics of this approach have accused it of being overly reductionist as it considers every person to be a rational actor who acts purely on maximising his/her own economic benefit, and instrumental as it views education purely in terms of the economic rate of return to a society and ignores the social and cultural benefits of education (Field, 2006: 80; Robeyns, 2006: 72-3).

On the other hand, the rights-based discourse, often present in UN and UNESCO rights declarations, views education as a "human right that should be guaranteed to all" and sees human beings "as the ultimate ends of moral and political concerns" (Robeyns, 2006: 75). In another example, the Irish Union of Student in Ireland's mission statement is equally couched in a rights-based discourse as it states that the Union works for "an education and training system open to all, irrespective of any condition," and the "right of students to a decent standard of living including the right to decent financial support" (USI, 2011). Critiques of this approach point to the fact that it sounds excessively rhetorical and lacks coherence and depth, can potentially reduce rights to their purely legal basis thus ignoring moral obligations, and finally that it is too centred around government action, which can be problematic in 'weak' states (Robeyns, 2006: 76-7, Sen, 1999: 227-8).

Finally, another dominant account, the human capabilities approach, has been championed by Sen (1997: 1959-61) as a way to "go *beyond* the notion of human capital, after acknowledging its relevance and reach." In his book *Development as Freedom,* Sen (1999: 10) identifies five groups of instrumental freedoms (political, economic, social, transparency, and protective security) that shape a person's capability and suggests that "public policy to foster human capabilities and substantive freedoms in general work through the promotion of these distinct but interrelated instrumental freedoms." In this approach, education plays a key role as an important pillar to not only advancing one's social freedom, but also improves one' other capabilities, such as improving participation in the economic system (Sen, 1999: 11, Robeyns, 2006: 78). This approach has also been criticised on various fronts. On the one hand, it has been critiqued on the grounds that it does not bring anything new to the debate that either the rights approach or feminist theory has not already brought to the forefront (Phillips, 2002; Jaggar, 2002: 230-7). Additionally, Sen's capability approach has been critiques on its methodological individualism, which results in a neglect of the political economy and more specifically the structure of modern capitalism and instead views individuals as "atoms who come together for instrumental reasons only, and not as an in intrinsic aspect of their way of life" (Stewart and Deneulin, 2002: 66).

It can be argued that the discourse on LLL has been presented through all three lenses, sometimes in competing or complementary fashion. For instance, the UNESCO Institute for Lifelong Learning's, which bases much of its work on the principles of the *Faure report*, incorporates language in its mission statement that is inspired by the rights-discourse when it states that "all forms of education and learning – formal, non-formal and informal – are recognized, valued and available for meeting the demands of individuals and communities throughout the world" (UNESCO UIL, 2011). On the other hand, Walker proposes lifelong learning as a way to improve one's 'capability to function' in the 'informational space' (Walker, 2007: 131), a claim that is further reflected in the European Council's call to invest in education and training as a way to promote social inclusion (CEC, 2000a: 9). However, the predominant discourse on lifelong learning is heavily influenced by the human capital approach, where lifelong learning is promoted as a way for individuals to keep up with the shifting demands of the workplace in an increasingly globalised and changing world (Preston and Dyer, 2003: 432). In its official communication in the build up for its LLL strategy, the European Commission (2001b) stated that it placed "lifelong learning firmly in the context of what individual citizens need to progress in all spheres in life" and more specifically, that it placed "on how education and training systems must fundamentally adapt to the needs of individuals in the knowledge economy." The human capability discourse has similarly been employed by groups representing students, such as the European Students' Union, which calls for student-centred learning to foster a lifelong learning culture in order to make students "more effective in their place of work and enabling them to contribute extensively to the society in which they live" (ESU, 2010:11).

Though these debates within and between these three normative accounts have played an important role in shaping educational policy, particularly LLL, they remain essentially debates on the form of LLL and do not address the role of capitalism in shaping LLL. Thus, the aim of this paper is not to further contribute to these general debate, but rather to look beyond simply the form of lifelong learning and instead at how both form and content are interrelated, and more importantly how and why a particular form of LLL has emerged in the EU since the early 1990s. In this instance, content and form are used in a neo-Gramscian perspective, whereby "material forces are the content, and ideology the form, of a particular historical bloc" (Germain and Kenny, 1998: 11). In addition, the interrelation between form and content will be analysed in a particular context, in this case the European Union in the last two decades. The strength of using such a method allows us to look at how "form and content, mode and social purpose are intricately interlinked, interdependent and mutually constitutive (Overbeek et al., 2007, 3).

This Research Paper proposes to use *régulation* theory as a way to look at this dialectical relationship between the form and content of LLL in the context of the European Union as it provides the analytical tools to analyse how political, economic, and social forces interact to support regimes of accumulation, thus providing in-depth insights on change and continuity during periods of stability and periods of crisis (Boyer, 2000: 319). Régulation Theory includes basic methodological tools as it is "grounded in the search for historically specific *structural forms* encompassing basic institutional invariables in relationships among diverse types of actors ('firms', 'workers', 'banks', etc.) and among markets (of labour, finance, products, etc.)" (Coriat and Dosi, 2002: 307). Saillard (2002: 184-5) defines four requirements to conduct research according to Régulation Theory:

"Clarify the origins of the unit of the level of analysis selected." This would include sectors, territories, international institutions, collective actors.

"Describe the institutions that enable the unit of analysis to function." This would include rules, norms, behaviour of collective actors .

"Indicate how the sphere of activity under analysis is a part of macro-economic interdependences and what its place is in the accumulation regime."

"Identify the places of an institutional and economic dynamic that founds reciprocal transformations of the unit under analysis and the overall economic system."

Saillard (2002: 187-8) also notes the potential tensions with the use of the term 'international régulation,' where on the one hand "it is a method of analysis that requires simultaneous recognition of national, transnational and plurinational levels, and a demonstration of how they interact," while on the other hand, "the use of the concept of 'international régulation' as an empirical result is inappropriate." This has led Gilly and Pecqueur to extend the analysis from "the routine behaviour of local actors and the absence of crisis to major crisis that imply a transformation of local institutional arrangements which may or may not have an impact on the institutional forms of overall economic régulation" (Saillard, 2002: 188). However, the overall consensus is that although there may be discussion on the concept of national régulation, it remains the main tool of analysis (Ibid, 188).

Chapter 5
Analysis

In order to understand how a particular form of LLL emerged as a dominant discourse throughout the European Union in the 1990s, it is important to not only explore its role in promoting a supranational level of governance, but also how it is "embedded in the dynamics of the longue durée of the capitalist mode of production" (Apeldoorn *et al*, 2003: 33). As such, using the methodological tools of French *régulation* theory, this section will look at the key moments of European integration and how they relate to the changes in the RoAs in Europe. This in turn will allow for an analysis of how a particular conceptualization of LLL and KBE came to support a specific type of growth regime at the detriment of others.

5.1 Early Integration Attempts

In the past century, a variety of types of crisis have led to structural changes in the RoAs and modes of production across Europe. In order to understand these changes, it is useful to briefly highlight the shifts in the RoA and MoR since the pre-war era. The dominant RoA in Western Europe prior to World War I was characterized by extensive accumulation without mass consumption (Boyer, 2004c: 56-7). In particular, the iron and steel industries became central to both economic development and state security and it is within these sectors that the majority of economic integration in Western Europe occurred. As these industries were labour intensive, they required a large pool of workers, which often immigrated from Eastern and Southern Europe. On the one hand, this competition to attract and retain workers put increased pressure on firms to offer competitive wages and working conditions (Strikwerda 1997: 56), but in times of economic downturn, the flexibility of the workforce meant that there was little protection against wage depreciation (Boyer and Freyssenet, 2000: 9). Furthermore, the labour force was also fragmented as "professional groups, in anticipation of harder times, organize themselves when they are capable of doing so in such a way as to obtain or defend (each independently of the other) the autonomy and advantages they have gained" (Boyer and Freyssenet, 2000: 9). Finally, the monetary regime supporting this sectoral integration was based on the gold standard and more specifically, it was underpinned by 'high finance,' composed of a "complex of central banks and key investment banks," which had a liberal and imperialist nature (van der Pijl, 1998: 54-56).

The First World War marked important changes in the process of European integration as countries changed trading partners and the export sector slowed down to focus on war production (O'Brien and Williams, 2004: 105). As a result, many industries began building closer relationships with the

State and attempts at greater integration through the European and International Steel Cartels were merely mediation forums between national alliances. It is also during the interwar period that "the discovery of new products or of new methods of production, without an immediate increase in the production of means of consumption, stimulated a boom" (Clarke, 1988: 63). In particular, the industries that experienced expansion of multinational investment were the automobile and food processing manufacturing (Strikwerda, 1997: 62). This led to a transition phase in the RoA where although there were significant technological advances, wages did not increase with the corresponding increase in labour productivity. As such, "the Great Depression of the late 1920s can therefore be understood as the result of a lack of compatibility between the new production methods and an unchanged mode of regulation, which did not enable wage-earners to increase their consumption" (Koch, 2006: 25). The 1929 depression and the ensuing war led to the structural crisis of the intensive regime of accumulation without mass consumption (Boyer, 2004c: 57).

The devastation left by World War II and the need for large-scale reconstruction pushed in an era of 'modern industrial capitalism' (Dannreuther, 2005: 188). Thus, the end of the Second World War ushered in a new RoA based on intensive accumulation with mass consumption that was characterized by not only the spread of technological advances to most industries which raised the level of productivity but also increased workers' salaries proportionally. This allowed for a growth in "the demand for consumption goods," which guaranteed it stability and allowed "the development of mass-production industry for these products" (Juillard, 2002: 155). Particularly, there was a boom in the demand for consumer goods and the construction industries, which in turn fueled the "demand for investment goods and for energy and intermediate goods such as steel and plastics" (Dunford and Perrons, 1994: 169). There was increasingly a separation between the ownership and management of enterprises and greater state intervention to "integrate the circuits of capital and consumer goods industries" and act as mediators in case of conflict between capital and labour (Koch, 2006: 27). This system was supported by international regulation, which replaced the gold standard with the Bretton Woods system, allowing national central banks and governments to have greater control over their monetary policy (Koch, 2006: 27-8). The post-war period was thus characterized by national champions that worked in conjunction with governments and labour unions to shape (oftentimes protectionist) national policies (Dannreuther, 2006: 192).

Some movement towards European integration occurred during this period: the 1951 Treaty of Paris establishing the European Coal and Steel Community and the 1957 Treaty of Rome establishing the European Economic Community (EEC), which sought to create "a common or single market in which goods, capital, services, and people could move freely within the European Community" (Dinan, 2005: 2). Though both treaties were attempts to stabilize European markets, the period was coined as one of

'Europessimism,' where there was little interest in deepening European integration and where governments generally operated in a neo-mercantilist manner (Dannereuther, 2006; Apeldoorn, 2000; 236-7). Hence, the EEC operated mainly "as an agency for transfer payments to agricultural interests" as two thirds of its budget went to the Common Agricultural Policy (Hyman, 1997: 314).

5.2 The Relaunch of the European Integration

In the 1970s, the advent of new technologies caused the breakdown of the RoA characterized by intensive accumulation and mass consumption. The collapse of the Bretton Woods international financial system liberalized financial markets (Tsoukalis, 1997: 138-42) and resulted in difficulties in calculating currency parities in Western Europe as it was subject to the "high volatility of the dollar-deutschmark exchange rate" (Bieling and Schulten, 2003: 233). This led to renewed interest in deepening European integration as a way to stabilise financial markets (Bieling and Schulten, 2003: 233), which in turn allowed for a greater role for finance capital as new investment opportunities and the possibility of currency speculation appeared (Koch, 2006: 32), and the "existing relations between money capital and productive capital broke down and were replaced by a hypertrophy of the international banking system" (Fennema and van der Pijl, 1987: 305).

Despite a growing consensus that steps needed to be taken to resolve the stagnant growth and unemployment that was afflicting European economies, there were divergent projects on how exactly this should be achieved. In fact, factions existed within both capital and labour and disagreements often emerged within the same organisations. One such organisation was the European Round Table of Industrialists (ERT) whose aim was to "wake up governments to the parlous state of the European economy," which was seen as lagging behind the United States and Japan in terms of competitiveness and innovation (ERT, 2011). The ERT is of particular importance to the process of European integration as its close relationship with the Commission has led some bureaucrats to suggest "the whole completion of the internal market project was initiated not by governments but by the Round Table" (Apeldoorn, 2000: 238). However, in the years following its formation, there were two competing factions within the ERT: one group, that had a predominately European market (particularly electronics and automotive industries) and was vulnerable to imports (particularly from East Asian) and the other, composed mainly of British and Anglo-Dutch multinational companies and global financial institutions, that had a vested interest in liberalizing the economy as it had a strong global market. Initially, the ERT was influenced by the former group and pushed, through the Commission's 1985 White Paper championed by Delors, for restrictions on the European market in order to support 'European champions.' Not only did this cause a rift within the organisation as many companies supporting further liberalization left the ERT, but these recommendations were met with firm resistance from the European Council due to the British, West German, and Dutch governments (Apeldoorn, 2000: 239; Holman and Van der Pijl, 2003: 81). The *Single European Act* (SEA) created in 1985 and implemented in 1987 outlined the goal to construct a single European market "with free movement of good, services, capital and labour" by 1992. Though the initial agenda for the single market was shaped by Europeanist industries that championed a defensive regionalism, its implementation, which treated non-EU owned subsidiaries the same as EU-owned firms, "led to a further opening up of Europe's national economies to the global economy" (Apeldoorn, 2006: 310). This opening of European markets into the globalised economy was further deepened with the 1993 GATT Uruguay Round.

Similar factions existed within labour during the 1980s, but on the issue of European economic integration itself rather than on the shape that it would take. In 1973, many European affiliates of the International Confederation of Free Trade Unions merged with their predominately Western European counterparts in the World Confederation of Labour to form the European Trade Union Confederation (ETUC). However, within these organisations, factions emerged among nationalistic lines as the British Trades Union Congress opposed integration and the German *Deutscher Gewerkschaftsbund* (DBG) strongly supported it. Even further divisions emerged within national unions, as the top leadership of the Nordic unions supported the project of integration whereas the rank and file members were against it (Hyman, 1997: 311). According to Hyman (1997: 312), though some of these disagreements "reflected sectoral economic interests – for example, between public and private employees, or workers in "exposed" and "sheltered" industries – the major line of differentiation probably reflected that between an orientation to a narrow "industrial relations" agenda and a concern with broader issues of macroeconomic policy and political exchange."

The fall of the Soviet regime ended the rivalry between planned economies and market liberalism and provided new business opportunities for businesses from Western Europe. This led to a change in direction of the ERT, as not only did the defecting globalised companies rejoin, but also its strategy "shifted to a more offensive, neo-liberal strategy" (Holman and Van der Pijl, 2003: 81). According to Apeldoorn (2000: 239-240), this "shifting balance can be understood within the context of the accelerated globalization of European industry in this period and the concomitant rising dominance of neo-liberal ideology within the European political economy." It is also during this period that further business lobby groups, such as the Association for Monetary Union in Europe, the Transatlantic Business Dialogue, and the European Financial Services Round Table (EFR) were formed to push for greater economic integration of a specific kind (Apeldoorn, 2006: 308). In its vision statement, the EFT, which represents the largest banks and insurance companies, outlines its *raison d'être* as encouraging "both national and European leaders to work for internationally consistent financial regulation and supervision and to support and promote free and open markets throughout the world" (EFT, 2011).

There were also important changes to the labour movement in Europe as the ETUC incorporated most Western European affiliates from the almost defunct WFTU and Eastern and Central European unions. However, despite representing 30 percent of all Western European workers and the majority of trade unionists, the ETUC failed to gain significant clout in Brussels as it lacked both funding, bureaucracy and decision-making power to speak on behalf of affiliates. It also received subsidies from the European Commission, thus inadvertently legitimizing the process of integration itself (Hyman, 1997: 312-3). In addition to a lack of resources, the growth of ETUC's membership led to further divisions, not only along ideological lines, but also along national and sectoral lines, specifically "between high- and low-wage countries, between those with advanced industries and those with more archaic structures of production, between those with well-established welfare states and systems of employment regulation and those without" (Hyman, 1997, 324). These divisions manifested themselves for example on issues of social dumping, where some factions push for strict regulation against it, while others saw it as a way for their country to integrate into the European market and alleviate unemployment. As a result of these internal tensions, there lacked a strong coherent strategy from the ETUC. It tried to lobby directly against some of the liberalization measures proposed for the single market, though this was met with limited success as it faced competition from better organized business groups and lobbyists for transnational companies advocating free-market reforms. The second strategy it employed mirrored Delors' 'social democratic agenda' for the European Union, which sought "to protect the 'European model of society', and its tradition of the mixed economy and high levels of social protection, against the potentially destructive forces of unbridled globalization" (Apeldoorn, 2000: 237-8). Hence, instead of fighting integration itself, it lobbied for a Social Charter that encompassed rigorous labour standards as well as for the incorporation of an employment criterion in the Maastricht criteria. In addition, labour unions fought for (and eventually won) the establishment of the European Work Councils Directive, which was vehemently opposed by employer groups such as the Confederation of European Business and the British government (Harrop, 2000: 188). Finally, individual unions mobilized against their national governments as they proposed cuts to social security programs in order to meet the Maastricht criteria. For example, the labour movement in France caused some concern at the European level when it striked against the Juppé government's proposal to cut job security and benefits to bring France in line with the convergence criteria. However, the diversity in the European labour movement made it difficult to reproduce these actions on a regional scale (Hyman, 1997: 324-6).

It is against this backdrop that discussions leading to the Maastricht Treaty occurred. The aim was to create an Economic and Monetary Union (EMU), which required substantial changes in the institutional and political framework. As a result, the *Treaty on European Union* (commonly referred to as the Maastricht Treaty) created the European Union, which encompassed the

European Communities (formerly the EEC). The Treaty also established the requirements for countries to join the Eurozone, which emphasized monetarist principles of low inflation rates and decreased government spending. Some elements of the Treaty still reflected a neo-mercantilist industrial policy agenda, particularly those on 'Trans-European [infrastructure] Networks' and 'Research and Technological Development' (Apeldoorn, 2006: 311). However, noticeably absent from the list was the employment criteria championed by ETUC. In addition, the watering down of the Social Chapter and the European Work Councils Directive until it had no real clout marked a shift to a 'symbolic euro-corporatism' rather than a genuine social democratic agenda (Bieling and Schulten, 2003: 247). Overall, the 'compromise' reached in the Maastricht Treaty reflected the interests of a globalised multinational and financial institutions and highlighted the Commission's increasing promotion of a model of finance-led growth. On a side note, it is important to note that there remained significant tensions within the Commission as to its direction. However, for the purpose of this paper, the dominant view will be presented.

The 1997 Amsterdam Treaty and the 2000 Nice Treaty resolved outstanding issues from the Maastricht Treaty and proposed further reforms in preparation for EU enlargement of Eastern members (El-Agraa, 2007: 36-9). The enlargement process itself added a new level of complexity to the process of European integration and presented a new opening for businesses, particularly as Continental European transnational corporations faced competition from American companies in Eastern and Central Europe (Holman and van der Pijl, 2003: 90). The new mechanisms introduced in the Lisbon strategy set the stage for further inter-state competitiveness as countries recently joining the EU were highly dependent on foreign investment, had low levels of corporate taxation, and had a flexible and deregulated labour force with less developed social security measures. (Bohle, 2009: 163-4). In addition, accession countries were required to liberalise their economies and "the EU closely monitored macro-economic development, monetary and budgetary policies, privatization policies and administrative reforms" (Bohle, 2009: 171). As the enlargement process was predominately economic in nature, it led to what Holman (2004) argues was purely a geographical enlargement that benefited transnational firms, a claim that seems to be supported by ERT unwavering support of the process of accession (ERT, 1991, 1999, 2004). On the one hand, the end of the Soviet regime left trade unions and 'left-wing' movements in Central and Eastern Europe delegitimised, rendering them too weak to mount any strong opposition (Bohle, 2009: 172). On the other, as enlargement gave transnational corporations access more flexible and cheap labour, it continued to weaken the Western European trade movement (Apeldoorn, 2009: 33). For example, in Germany, two sectors, the automotive industry and telecommunications sector, were particularly quick to threaten relocation to Eastern and Central Europe unless trade unions accepted wage and security concessions, thus threatening traditional wage relations in the country (Bohle, 2009: 178-9). The enlargement process also increased the variety of growth regimes present in the European Union. The following section will provide a brief overview of the growth regimes that emerged since the end of the mass production mass consumption era.

5.3 Growth Regimes in the European Union

There is a general consensus that the 1970s marked the end of a mass production mass consumption RoA and that a 'post-Fordist' era has emerged defined as one of extensive production with mass consumption (Boyer, 2004c: 59). However, according to Petit (2003: 4), countries have followed a variety of paths of capitalism within this RoA as the "internationalisation of the economies has increased and also because productivity and demand regimes are presenting themselves to external competition (or collaboration) in a new manner (be it in generating innovative products by means of international collaboration or allocating capital by means of international financial places)." Koch (2006: 36) proposes a useful distinction between two ideal types of 'post-Fordist' growth strategies: one that is capital-oriented and the other that is negotiated. In the former, there is a "lack of coordination (typically achieved by bargaining at company or individual level) and a general orientation towards (short-term) capital interests [...] for capital valorization without much consideration of other parameters such as the development of real wages or economic participation". In contrast, in the negotiated growth strategy, "wage coordination continues to take place either at the national or sector level and is oriented towards achieving a balance between capital valorization, productivity growth, wage developments, and labour market participation." These are of course ideal types and within these there are a multitude of growth regimes. In order to demonstrate the impact of the Commission's knowledge-based economy and lifelong learning agenda on member states, the following section will identify the four broad models of growth that will help highlight the variety of growth regimes in the European Union. In order to provide an in-depth analysis, this section will focus of the RoA and growth regimes in the European Union, at the expense of an analysis on the MoR and institutional forms.

Finance-led Regime of Accumulation

The first RoA that can be identified in the EU is one that is increasingly finance-led, which can be found in Britain and Ireland, the Benelux countries and the Baltics states. A finance-led RoA can "characterized by a large share of the financial sector (and the real estate sector) in GDP, high ratios of stock market capitaisation and high and increasing private debt" (Becker and Jäger, 2010: 4). However, there are important differences between these countries. Anglo-Saxon countries (Ireland and the UK) have adopted a *neoliberal finance-led regime of growth*, with "a continuing lack of coordination in wage determination" and "capital-oriented reforms of regulatory system," which strive to minimize the role of the State in the market (Koch, 2006: 158). It is however interesting to note that Ireland has also embarked on technology-led growth that is based on the deregulation of the labour and product market and heavy investments in scientific research that leads to technical change (Boyer, 2004a: 19-20).

In contrast, the Benelux countries, specifically the Netherlands, have a growth regime that can be defined as a *negotiated finance-led growth regime* as they has embarked on a "transition in wage determination from automatic indexation to more flexible principles," but where the state remains a central player in the negotiation of this new comprise (Koch, 2006: 158), thus minimizing some of the inequalities. As a result, along with Sweden and Denmark, the Netherlands had the highest shares of government final consumption (Eurostat, 2009).

At the fall of the Soviet regime, the Baltic states (Lituania, Latvia, Estonia) underwent an intensive process of liberalization and de-industrialisation of their economy and a pursued a *services-led regime of growth*, focusing both on financial services (specifically financial intermediation) and in the sectors of trade, transport and communications. The Baltics states (and Bulgaria) have pursued strategies to retreat from the economy, particularly by operating "by far the smallest fiscal states of the region and keep relying on the most restrictive monetary institutions, currency boards," (Bohle, 2009: 172) which allowed for a decrease in inflation, but resulted in de-industrialisation. In addition, these countries have one of the lowest social expenditure per GDP in Europe (13 percent versus 28 percent), making them some of the most unequal societies on the continent. Finally, the Baltic countries have an antagonistic relationship with labour, which has been weakened to the point where "trade union density as well as collective bargaining coverage is among the lowest in Europe" (Bohle, 2009: 172-3). Similarly, South Eastern European countries such as Bulgaria and to a lesser extent Romania also underwent a significant privatization and liberalization agenda in the last decade and also developed a growth regime based on financialisation and services with the assistance of FDI (Becker, 2010: 9-10).

Export-Led RoA

The second main RoA found in Europe is oriented towards the export of both manufacturing and services. Within this category, we find the Nordic countries, Germany, and the Visegrad Four countries. Though there is no homogeneity of growth regimes within Nordic countries (Denmark, Finland and Sweden), there has been a tendency towards a *social democratic technology-led growth regime* that contains elements of a knowledge-based economy, such as government investment in accessible quality education and lifelong learning and genuine cooperation between firms and universities. Though there remain important differences in their regulatory environment, they share a "*systemic complementarity* between the coordination mechanisms governing the creation and diffusion of knowledge" and in all cases institutions "seem rather instrumental in providing coherence and efficiency to the system" (Boyer, 2004a: 15).

After World War II, German growth was driven by exports of specialized goods and services to circumvent price-based competition and distribution was coordinated nationally but in non-hierarchal fashion allowing growth to be stimulated by domestic consumption. Following a Beveridgian growth regime, workers benefited from stable employment, "a large percentage of skilled workers, co-operative yet powerful labour unions, and advanced social protection systems" (Boyer and Freyssenet, 2000: 11). Currently, the German industry has been heavily reliant on its "competitiveness of traditional industrial areas (mechanical engineering, the chemical sector, vehicle production)" (Koch, 2006: 46) and has remained one of the main exporters, predominately to the European market, but also on the world market (Holman and Vale, 1992: 16). Though some argue that the German model of growth has remained unchanged (Klickauer, 2002), there has been a slow shift from wage determination at the sectoral level to the company level and the "transition from a moderating state towards a weak state," which slowly undermines the principles of profit redistribution at the heart of the wage determination system (Koch, 2006: 158). Despite these changes, Germany's growth regime can be identified as *competitive export-led competitive regime of growth* that is state driven. I include Austria and Slovenia in this category, as both are predominately export-led and have similar neo-corporatist state structures (Becker, 2010: 4), though Slovenia remains more reliant on FDI (Bohle, 2009: 173).

Though the Visgrád countries (Hungary, Czech Republic, Slovakia, and Poland) also went through a process of liberalization, privatisaton and deregulation, they did so at a much slower pace and in contrast to the Baltics, they attached sizeable foreign direct investment (FDI) in the export oriented manufacturing sector as well as in infrastructure, finance and trade (Bohle, 2009: 173). As such, they have an *FDI-dependent export-led competitive growth regime*. The States played an important initial role in terms of attracting FDI, particularly through the "deregulation of the foreign investment regime" and "tax exemptions, direct subsidies for specific investments, import protection, building of infrastructure, investments in skills, and reforms of the labour code towards more flexible regulations" (Bohle, 2009: 174). Investments from the private sector led to wage increases for some, but not all of the population. The governments have attempted to reduce socio-economic inequalities through social spending and there have been many attempts to implement a tripartite system, with mediocre success (Bohle, 2009: 175).

RoA Based on Light Manufacturing Confronted with Flexibilisation

Often referred to as catch-up economies in the European context, the Mediterranean economies (Greece, Portugal, Southern Italy and Spain) underwent a process of development based on flexible specialization, defined as "the manufacture of a wide and changing array of customized products using flexible, general purpose machinery and skilled adaptable labour" (Hirst and Zeitlin 1991: 2). Such a system has led to the casualisation of work and the rise of home workers in certain areas (Simons and Kalantaridis, 1994: 653). In addition, all possess a similar mode of social relations, with "*corporatist* status divisions in the social security system based on employment and occupation" as well as a strong level of labour regulation and *familialism* (Karamessini, 2007: 3). In the past decade, Spain's has increasingly relied on "credit financed growth of the construction industry," (Becker, 2010: 6), whereas Portugal, has turned to a 'catch-up' technology-led growth, with low knowledge achievement and greater employment protection (Boyer, 2004a: 19). In all instances, there is a high level of job protection, but mainly for male breadwinners. In addition, there is a high level of industrial conflict and with the exception of Portugal who has sectoral bargaining, all have tripartite arrangements that have come under strain in the last decade (Karamessini, 2007: 6-10). In particular, all these countries have underwent a similar European neolibarlization process, which has been accentuated since the financial crisis as austerity measures are being introduced in Greece and to a lesser extent Portugal due to the high level of resistance.

Miscellaneous

Up until the 1970s France and Northern Italy had consumption-driven growth driven by a nationally coordinated distribution of productivity gains, with strong national unions that played an important role in income negotiations (Boyer and Freyssenet, 2000:10-1). However, there are important differences between the two countries. In the case of France, the crisis led to the fragmentation of the wage relations system (Coriat, 2002: 252) and the shift away from a 'dirigiste state model' to the adoption of more ordo-liberal policies (Birch and Mykhnenko, 2009: 367), despite an accumulation regime that remains intensive and that focuses mainly on electronics and cars for the European market in the case of France. Hence, though there has been an important change in institutional forms, there remains institutional inertia and *no one growth regime* has emerged to replace Fordism (Boyer, 2002: 235). In the case of Northern Italy, there has been a strong industrialisation process, particularly around the 'Third Italy' and increasingly the emergence of financialisation. Though it obviously shares some characteristics with Southern Italy due to many shared institutional forms, it remains somewhat distinct due to its strong variations in its main sectors of industry and as a result the organisation of social relations (Karamessini, 2007: 5). As such, although also different from France, it does not clearly fit in other categories of growth regimes.

Though the number of growth regimes within the European Union highlights the great variety of national incomes and forms of distribution, it is seldom reflected in the Union's strategies beyond brief acknowledgments of the diversity of the Union (CEC, 2010b: 9). The following section will explore in greater detail the concepts used by the Commission and the Council to promote one particular regime of growth.

5.4 Lisbon to Lisbon: Benchmarking and Social Cohesion

In the period of the lead-up to enlargement, the discourse on competitiveness gained further momentum. For example, in its 1997 report *Benchmarking for Competitiveness*, the ERT suggested the idea that all social and political activity should be subject to benchmarking against market standards as a way to increase efficiency and that workforce flexibility (through changes in social security programs and a focus on lifelong learning) was a key element to turning around structural unemployment (Holman and van der Pijl, 2003: 81-2). The idea of benchmarking as a tool to achieve competitiveness was further reflected in the Council's 2000 *Lisbon Strategy for Growth and Jobs*, where the Open Method of Coordination (OMC), emphasising "supranational monitoring and benchmarking of national policies, was welcomed as the preferred 'new mode of governance' for implementing a 'new European social policy'" (Apeldoorn and Hager, 2010: 210). The OMC was presented as a "method of benchmarking best practices on managing change" and was said to "be devised by the European Commission networking with different providers and users, namely the social partners, companies and NGOs" (CEC, 2000a: 11). In 2005, the *National Reform Programmes* were developed as a way for member states to meet the targets set out in the OMCs. Not surprisingly, the Lisbon strategy was welcomed by the ERT as it provided a tool to further pressure countries to implement market-efficient policies as a way to boost competitiveness for transnational corporations, but it was also supported by national industries and predominately European industries as well as trade unions (Apeldoorn and Hager, 2010: 220). The ETUC welcomed Lisbon as it provided a "balanced and integrated approach between economic, social and environmental policies" (ETUC, 2005). This consensus was underpinned by a shared belief by all groups that the EU was facing "a quantum shift resulting from globalization and the challenges of a new knowledge-driven economy" (CEC, 2000a: 1).

In addition, it clearly highlights the influence of the ERT on the work of the Commission as reflected in the ERT's former Secretary General, Keith Richardson's (2000: 25) remarks: "Lisbon traced the direct link from globalization to job creation by means of competitiveness as clearly as the ERT had done in […] many […] reports over the previous decade, and Lisbon's long list of policy specifics reflected the familiar ERT priorities all the way from benchmarking to lifelong learning." Furthermore, the Lisbon strategy also called for the "acceleration of the completion of the internal market for financial services" in order to implement the Financial Services Action Plan by 2005 (CEC, 2000a: 6), thus reinforcing the dominance of finance capital at the detriment of industrial capital. Though there remained some tensions between these two factions (especially on the issue of mergers and takeovers), industrial capital was becoming increasingly dependent on the financial sector as top managers of industrial firms relied on it for profits through derivatives and the marketisation of corporate control as managers became further integrated through stock options (Apeldoorn, 2009: 34). Thus, during the process of

European integration there appeared different interests within capital and labour, but also how a certain degree of agreement emerged to favour one type of integration. In this regard, the 2000 Lisbon strategy is particularly telling as it clearly outlined the Council's two favoured growth regimes: a knowledge economy led by information and communication technology and finance-led growth (Apeldoorn and Hager, 2010: 219).

In 2005, the Lisbon Strategy was relaunched under the presidency of Barroso, who identified economic growth and jobs as the most important issues for the European Union. However, instead of striving to reach a consensus based on social cohesion, it was much more explicitly focused on the flexibilisation of the workforce, the 'modernisation' of social programs, and the 'investment in human capital through better education and skills' (CEC, 2007b: 27), particularly through lifelong learning. Initially the Lisbon Strategy for Growth and Jobs was well received by employers' groups (BusinessEurope, formerly UNICE, and CEEP) and ETUC who, together, issued a joint statement which said that "in the face of the challenges of globalization, technological progress and demographic ageing, the Lisbon strategy remains as valid and necessary as it was in 2000" (ETUC et al., 2005).

Finally, the 2007 Treaty of Lisbon's stated aim was "to complete the process started by the Treaty of Amsterdam (1997) and by the Treaty of Nice (2001) with a view of enhancing the efficiency and democratic legitimacy of the Union and to improving the coherence of its action" (CEC, 200dc: 1). As an attempt to revamp the Union's constitution in light of the completed accession of its new members, it faced considerable opposition. In a first instance, the initial proposal, entitled *Treaty establishing a Constitution for Europe*, failed to pass at the French and Dutch polls in 2005, pressuring French president Sarkozy to push for the removal from EU objectives the clause on "free and undistorted competition," to the outrage of the Commission and the ERT, which feared that it would prioritise employment and social objectives. Secondly, the Lisbon Treaty initially failed to pass through a referendum in Ireland in 2008 (Apeldoorn 2009: 39-40). Though Lisbon highlights some of the legitimacy issues and tensions facing the EU, it did not substantially change the direction of the Commission, particularly in terms of its push towards promoting a particular type of growth regime throughout Europe. Thus, according to Birch Mykhenenko, (2009: 359), there is a trend in the EU policies to ignore "industrial structure in different countries and the assumption that labour markets are not contingent upon (supra)national institutional conditions."

5.5 Implications

Despite its call for a 'European-cantered' development of a knowledge-based economy, in which LLL plays a key role, the Council's recommendation mirror the US-style knowledge growth model that is based on deregulation and the flexibilization of the labour force and sees the preconditions of a knowledge-based economy increasingly based on high skill work and lifelong learning. In addition, in this conception of knowledge-based economy, the development of ICT is crucial and its funding requires "an abundance of venture capital, and new financial markets would have to be created to enable a public listing of the securities of firms implementing new technologies" (Boyer, 2004a: 11). In short, the model of KBE proposed follows a competitive market model, where "a very active labour market is responsible for assessing at any given moment in time what each individual should be paid in light of his/her competency, the demand for their services from the business sector, and economic conditions generally" (Boyer, 2004b: 71). Such a market-oriented growth regime requires strong patent laws as well as the protection of intellectual property rights.

The call for a finance-led and KBE-led regime of growth are presented as increasingly interdependent, as evidenced by the following statement in the Lisbon Strategy:

> preparing the transition to a knowledge-based economy and society by better policies for the information society and R&D, as well as by stepping up the process of structural reform for competitiveness and innovation and by completing the internal market (CEC, 2000a: 2).

In addition, in order to facilitate the knowledge economy, the Council proposes to tighten legislation on copyrights, patents protection, and benchmarking progress in incorporating LLL as a basic component of the European social model. Thus, knowledge becomes increasingly commodified and incorporated within a finance-led regime of growth, (Jessop, 2004: 16-7), and both support a discourse on innovation, competitiveness and entrepreneurship. Specifically, competitiveness in the market-led KBE "is seen as the consequence of endogenous capacities—i.e. supply-side factors—whilst ignoring the importance of industrial structure and sectoral specialization to national and regional economies" (Birch and Mykhenenko, 2009: 359).

Promoting one type of KBE can thus have detrimental effects when the structural differences within growth regimes are not considered. For example, countries that have embarked on technology-driven growth through "*a widespread socialization* of knowledge" that is "organized by means of collective investments," such as the Nordic countries, have actually outperformed the United States in terms of technology-driven growth (Boyer, 2004b: 71). In this type of growth regime, the "market is not the dominant form of coordination, rather cooperation is essential and is institutionalized along national lines" (Boyer, 2004b: 71). However, the market-led KBE promoted by the EU would undermine the institutions developed by Nordic countries that actually served to strengthen the success they have experienced in their negotiated technology-led and knowledge-led growth regime. On the other hand, such a conception serves to establish a division of labour based on knowledge, in favour of certain countries, such as Germany, who have specialized in more knowledge intensive, higher value-added industrial sectors, at the detriment of the Visegrád countries who specialize in mass low cost commodities (Hoogenboom et al., 2008: 369). Hence, as discussed above, the intertwined KBE and finance-led growth regime put forward by the European Commission has been shaped by certain factions of capital and as a result, can be detrimental to the interests of numerous other factions within member states.

Chapter 6
Conclusion

The rise of LLL as a prominent discourse in the European Union is not accidental and is rather part of a broader agenda to promote a particular growth regime at the expense of the many regimes in place in member states. Hence, this research paper sought to go beyond implementation discussions of forms of LLL and instead provided an analysis of its nature of LLL, particularly the forces and social meanings that shaped this discourse in the European Union in the 1990s. As was highlighted, the European Council's framing of LLL discourse within the language of human capital plays an important role in supporting the development of a market-driven knowledge-based economy, particularly as it supports the idea that education and skills training need to be geared towards sectors that require constant skills upgrading in order to be competitive in the development of high value-added sectors (Birch and Mykhenenko, 2009: 359).

This also highlights how the Commission has increasingly championed a capital-oriented growth strategy at the detriment of countries that have organised their economic and social relations based on a negotiated growth strategy. More specifically, the type of knowledge-based economy presented in the *Lisbon Strategy* has been shaped by forces supporting a finance-led growth regime wherein the deregulation of the financial sector facilitates credit and flexibilisation of the workforce favour financialisation while helping develop the knowledge based economy (Kim, 2007: 30). In this instance, instead of stimulating demand, the state then becomes responsible for "providing the infrastructure for workers to continually adjust their skills to the demands of the KBE" (Birch and Mykhenenko, 2009: 359).

However, it is important to note that the concept of LLL has not been imposed by force, but was rather embraced by a wide variety of groups, including labour unions and student organisations that viewed LLL and the KBE as a building block of the European social model. Thus, when couched in the form of human capabilities, LLL has played an important role in terms of building a broader consensus and has been one of the centrepieces of the agenda on social cohesion in the *Lisbon Strategy*. Nevertheless its overall emphasis on the human capital dimension undermines the very European social model it is meant to support (Birch and Mykhenenko, 2009: 359).

As the *Lisbon Strategy* was devised at a time of economic growth and optimism, its validity has now been called in question. In 2005, critics stated that "the strategy suffered from fatigue and several crucial weaknesses had left it with very limited results" (Jones, 2005: 251). Far from abandoning the ideas of the Strategy, the 2005 mid-term plan reasserted that importance of "knowledge, innovation and optimization of human capital" and the need to "develop research, education, and all forms of innovation insofar as they make it possible to turn knowledge into an added value and create more and better jobs" (CEC, 2005). Throughout the process, labour unions and student organisations have continued to assert the need for the Strategy, albeit with some modifications. The Lisbon Strategy, and within it the call for increased LLL, has therefore played a major role in shaping consensus between factions of capital and factions of labour.

The current economic crisis has been no exception. On the one hand, the ERT has called for an acceleration of the implementation of the EU's competitiveness agenda' and the *Lisbon Strategy for Growth and Jobs* (ERT 2009; Apeldoorn and Hager, 2010: 230-1). Similarly, the EU has called for the implementation of the Lisbon strategy and its successor Europe 2020 as a way to overcome the crisis" (EurActiv 2009; CEC 2009). At the consultations for development of Europe2020, "organisations representing labour welcome the strengthening of social provisions in the new Lisbon Treaty and ask for a stronger social dimension of the EU, including re-connecting market liberalisation with social and environmental objectives" (CEC, 2010c: 17). In short, though the *Lisbon Strategy* has been proclaimed dead numerous times since its inception, the ideas that it embodies continue to be championed by both the business sector and social and trade organisations alike, thus reaffirming that some of its key components, the development of a knowledge-based economy and the implementation of a LLL agenda, are essential elements in building a broader European societal consensus, despite a multitude of diverging interests.

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