

# Financing and institutions as key elements of the future of adult education – some empirical observations

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# **Financing and institutions as key elements of the future of adult education – some empirical observations**

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A main aim of the study was to acquire comparative and comprehensive information about the levels of financing in states from different welfare regimes (Nordic: Sweden, Finland; liberal: UK/Scotland, Australia; Austria as a continental country), and to observe the different sources of the expenditure by broad categories of actors (individuals, the state, enterprises).

The results were unexpected in some ways: first the overall expenditure per capita was highest in Austria, with the highest expenditure by individuals, signifying rather a neoliberal policy approach than a corporatist one; second, there is no overall relationship between participation and expenditure in the selected countries, except that higher state expenditure are related to increased participation in formal AE; third, in terms of policy strategies the results do not point towards deliberate systematic patterns: Austria shows the most 'neoliberal' pattern, despite none of the actors does follow deliberately this strategy; in the liberal countries high state expenditure are combined with low overall expenditure and high participation.

## **1. Introduction**

This paper elaborates on results of a comparative observation and analysis of the expenditure for adult education (AE) in a set of five countries (our own country Austria compared to Finland and Sweden as two Nordic countries, and Australia and Scotland/GBR as two liberal countries). As its empirical part it presents the approach of how the total financing was observed in our project, and relates the estimated expenditure to participation and institutional traits in the countries compared. In its conceptual and theoretical interpretation and reasoning about the – quite astonishing and unexpected – results it tries to put the resources and expenditure dimension into a broader political and institutional understanding that neither would downplay nor overemphasise it.

The study has built on a set of previous analyses in Austria performed in the context of a gradual development of a 'lifelong learning strategy' that has included quite fierce disputes about the positioning of adult education in this context. Two observations have stood out in the beginning: First, Austria has made quite early moves to include the topic of Lifelong Learning into the programme of the European Social Funds (ESF); second, the measures taken in this programme were primarily focused on initial and youth education, despite the public expenditure for adult education was very low. So the dispute in the course of the Evaluation of the ESF interventions was about the potential impact of the European Funds for lifelong learning in Austria: as the amount of additional funds was given, it could clearly make much more impact in relation to the small public funds spent on adult education than in relation to the huge and also comparatively high expenditure on initial education. Further questions emerged from this dispute: how much is really spent in adult education from different sources? From which rationales can the amount and proportion of public spending be evaluated? It was clear that a rational discourse about funding policies is foreclosed if the amount of available funds is in fact unknown. In the lifelong learning policy discourse a market oriented perspective has gained hegemony in the 2000s, posing main emphasis on the redefinition of costs into investments and their relationship to the returns for the different stakeholders. An even relationship of investment and returns was assumed to reflect the proper working of the market, cost-benefit discrepancies were seen as signals for 'market failure', and market failure as justification of public interventions. As the empirical assessment of these relations turned out much more complicated than expected, a generalised rule of thumb came up that has distinguished three main categories of players – individuals, enterprises, and the public – and proposed normatively a rough 1:1:1 relationship between these categories in funding. Accordingly the question came up, how this relationship would play out empirically. The attempts to observe or estimate these proportions have led to important institutional issues, concerning the attribution of the substantial funds of labour market policy to the three categories of players, and furthermore leading to questions concerning the welfare model: in the conservative Bismarck-type welfare state the means for labour market policy are raised by the social insurance from employees and employers, and the spending is clearly related to the entitlements according to the insurance principle. Thus an ambiguity arises about whether this empirically big

amount of money should be attributed to the public funds or to the contributions of the employers and the employees – in Austria the 1:1:1 relationship is grossly reached, if the labour market policy expenditure in adult education is attributed to the public funds, however, if counted as part of the employers' and employees' contributions, the public funds are very low.

These questions about the amount of expenditure were supplemented by further dispute about reasonable funding mechanisms and the creation of supportive institutional structures in adult education. One longstanding debate concerns the support of institutions vs. the strengthening of market forces, another debate came up with the new project related European governance mechanisms, that has replaced the traditional unconditional lump-sum support with the more goal and results oriented and heavily monitored practices in the ESF policies. These two topics are strongly structuring the political and professional discourse, and in their background lay important institutional issues:

- The discourse about the funding of adult education in Austria is dominated by a market-rhetoric. As the market is commonly attributed as being the main governance mechanism, questions about political alternatives to marketization are hardly asked. However, as there are mainly institutional and non-profit players acting in this 'market', the practices of the actors are in fact not profit-driven but heavily determined by institutional structures and interventions (which in turn are not transparent and also covert by the market rhetoric; Lassnigg, 2011). In the adult education discourse since the 1990s we can find thus a paradoxical structure, as the positive struggle of the institutions to make themselves marketed and commodified was a main theme under a rhetoric of modernisation, however, questions about the purpose of this struggle and its alternatives were hardly brought up (Lenz, 1994, Lassnigg, 2015). This discourse was supported by the high emphasis given to vocational adult education and labour market policy, which is to some extent familiar to the market logic and, moreover, receives strong support in the corporatist institutional structures of the Austrian Social Partnership (with employers and employees organisations owning their own big training institutes, and being involved as key players in the governance structures of adult education, labour market policy, and social insurance). The institutions of non-vocational adult education did not stand against the tide, but rather tried to get into this market and to some part to vocationalize themselves. In sum a discourse about economisation, commodification, and

marketization in adult education is widely lacking in Austria (with some exception in higher education (Heissenberger, Mark, Schramm, Sniesko, & Süss, 2010);

- The governance topic and the stance of the adult education sector towards the EU-policy was somehow trapped in the conflict between the existing institutional structures and practices of support of adult education on the one hand, and the potential of reaping additional funding from the European programmes. Institutional support is driven by the political decision in the early 1970s not to establish a clear political responsibility at some point of the complex Austrian state under the leadership of the central government, but only to amend a law (Erwachsenenbildungsförderungsgesetz) about providing government support to a set of stakeholders (KEBÖ Conference of Austrian Adult Education), and otherwise to leave the scattered and strongly voluntarist structures of responsibility among the regional and local authorities. A mechanism of support from the central budget to an organised set of recognised adult education providers was set up, that distributed a yearly updated amount of money to the institutions. In addition the various players have their relations to their owners, and to the various government authorities at regional and local levels, where they also (can) receive various kinds of support (the resulting structure is called the 'cooperative system').

One purpose of this solution was the intention on the side of the players to remain independent from the state, however, at the cost of an overall weak institutional structure, and of the perpetuation of conflicts and competition among them; because new providers came up, insiders and outsiders emerged among providers, that further weakens the overall structure. The EU programmes were originally situated under the control of the social and labour market policy authorities, with the education authorities somehow invading these policies under the rhetoric of lifelong learning in the 2000s. The players in adult education had to choose between defending their independence in the traditional support structures, and applying for additional funds by subordinating themselves to the new European support regime. They took different stances, and no common policy towards reaping funds for the sector has been developed. In particular vocationally and labour market oriented programmes developed, including several new providers that were/are not part of the established provider system. In parallel the support structure of the central government has changed towards new governance instruments (achievement contracts), and some comprehensive support instruments have been set up (Adult

Education Initiative: <https://www.initiative-erwachsenenbildung.at/>). However, the institutional structure remained fragmented and divided along several lines. This is visible in the Austrian Lifelong Strategy (Republik Österreich, 2011), in which the various activities towards adult education do not get momentum so far, and the related benchmarks fall increasingly apart.

On this background questions arise first about how the status of adult education in Austria can be evaluated, and second how it can be politically supported and sustainably established as a fair part of lifelong learning (policy). At this point the comparative dimension comes into play. It has become familiar to use country comparisons as a source of assessment and evaluation of the situation in a particular country, and furthermore also to look for good practices abroad to learn from them in policy making at home. Both practices, however, are at the same time rightly heavily disputed. Comparisons are mostly very superficial and selective, and utilized in biased ways, and learning from good practice needs so much understanding of contexts that is, however, mostly lacking; thus its use is rather rhetorical and propagandistic than substantial. We wanted to overcome these shortcomings at least to some extent by our approach and methodology (Lassnigg, Vogtenhuber, & Osterhaus, 2012):

- First we wanted to make controlled comparisons with countries selected on purposive grounds, so we selected countries according to the contrasting welfare regimes to the Austrian conservative-corporatist continental type, on the one hand Nordic countries which are theoretically supported judged as good practice cases (Rubenson, & Desjardins, 2009, Desjardins, & Rubenson, 2013), and on the other hand countries of the liberal type that rather confirm the current mainstream regime of economization (Rees, 2013);

- secondly, we tried to get a complete picture about financing by the different actors' categories, and used available comparative statistical sources in combination with qualitative explorations in the countries (examples of comprehensive studies of expenditure are available from Germany by Hummelsheim (2010) and the UK by Williams, McNair, & Aldridge (2010)), however, based on national sources only and thus not so easily comparable), a shortcoming of our approach is that only a cross-sectional analysis of funding is possible with this data (no time series available), which is additionally problematic because of some time-inconsistencies;

- third, we tried to get beyond the simple participation benchmarks as measures for performance, by trying to use more detailed indicators, and also looking at their patterning in relation to each other, here unfortunately not much comparative information is available that would consistently include our cases (Kilpi-Jakonen, Vono de Vilhena, & Blossfeld, 2015);

- finally we also looked to some extent at qualitative information about the policies and institutional structures in the countries compared, to get an overview about the relationship between financing and structures of AE; this was clearly constrained by the overall background condition that the study had to be as simple as possible and as cheap as possible.

The results of the estimation of financing of adult education in a comparative perspective were highly unexpected for us as researchers and for the Austrian stakeholders also, as the Austrian expenditure turned out not to be comparatively low (as expected) but on the contrary comparatively high, in particular with respect to the contributions of individual citizens. At the same time the indicators about participation and policies confirmed a rather unfavourable pattern in comparison with the other countries.

In this paper we try to go beyond the original purpose of understanding the Austrian structure and policies in a comparative context, and aim at a wider reflection about the different levels and patterns of financing in relation to strategies for the future development of AE. In the next sections the paper introduces the conceptual approach and the theoretical rationale (2), describes the methodology of our estimations (3), presents the results (4), followed by a discussion (5) and considerations in relation to the conference topic (6).describes

## **2. Theoretical Perspectives on Financing of Adult Education and Informing Policy making**

The comparative empirical analysis was pragmatically inspired by questions about the impact and methods of public expenditure for adult education Austria, and how it could and should be improved, with the alternative strategies of supporting individuals in the market vs. supporting the providers and strengthening the institutions in mind. The conceptual approach behind the empirical analysis was based on two main strands of reasoning:

- one was derived from the reasoning about public interventions because of underinvestment based on market failure, that has inspired the proposition of a shared financing by the three actors' categories of individuals, enterprises, and the state to roughly equal proportions; from this argument the empirical question about the distribution of the contributions of these actors' categories arises;

- the other strand was the reasoning about the consequences for financing and participation structures of the institutional embeddedness of adult education in different welfare regimes as brought forward by the 'bounded agency' approach (Rubenson, & Dejardins, 2009); from this the selection of the countries for comparison from the Nordic and the liberal regime resulted, which should also bring some illumination about consequences of a more institutionally (Nordic) vs. a more market oriented financing strategy on participation and structures of adult education. Grossly, the welfare regime approach would suggest that the Austrian results would rank in between the Nordic and the liberal regime, with alternative policy directions towards improvement possibly to be inspired by the Nordic regime, and -- less clearly expected -- towards decline to be inspired by the liberal regime and more market based policies.

The expectations derived from this reasoning, and the available knowledge from the literature based on international indicators and data bases were quite simple and straightforward: The Nordic countries should allocate comparatively high resources, spent to a high degree from public sources, with comparatively high and equal participation; on the other extreme the liberal countries should reap their (eventually rather scarce) resources to a high extent from the individual contributions in the market, eventually with less participation and probably more inequalities; Austria as a corporatist country was expected to spend at least less than the Nordic countries, with a high proportion of contributions from the enterprise sector, and with medium participation and rather high inequality, both dimensions ranking eventually better than the liberal countries because of the corporatist coordination.

It must be kept in mind, that comparative information about total financing by the different actors' categories was not available at this time. The main outcome to be produced by the project was to collect this information, and to compare this with indicators about participation available in the comparative data bases. The study must be seen as a pilot in this respect, and still this kind of information about expenditure for adult education is not available in international data bases.



### **3. Research Design and Methods: Estimations from Comparative Data bases, Supported by Direct Inquiries in the Selected Countries**

A main aim of the study was to acquire comparative and comprehensive information about the levels of financing in states from different welfare regimes (Nordic: Sweden, Finland; liberal: UK/Scotland, Australia; and Austria as a continental-corporatist country), and to observe the different sources of the expenditure by broad categories (individuals, the state, enterprises). The distribution of financing allows to some extent to control broad policy strategies, a high proportion of individuals signifying liberal policies, a high proportion of enterprises signifying corporatist policies, and a high proportion of the state signifying high public responsibility for AE. These patterns are also analysed with respect to variables about participation in AE, partly distinguished by vocational and non-vocational purposes. These steps give some hints about how the level and structure of financing relates to very basic patterns of participation. The main purpose of the study was on the national level, to better understand the Austrian structures by mirroring them through the comparison; however, the study also contributes information about the other countries selected. The methodological approach relies on quantitative data, however, takes also elements of case studies, as the collection of the data needed direct contacts with representatives of the countries. Different sources of information were matched, and for the purpose of comparison the data were standardized by purchasing power and per capita. The sources for information about financing are fourfold:

- (1) for state/public expenditure (a) the public budget, and (b) the expenditure of the public employment agencies for adult education/training were used;
- (2) for the contributions of enterprises country specific surveys were not available, thus two waves of the European *Continuing Vocational Training Survey* (CVTS2&3, 2005-07) were analysed;
- (3) expenditure by individuals was estimated from the European *Adult Education Survey* (AES, 2007), country specific surveys were also not available;
- (4) for Australia complementary comparable sources were available and utilised (TEPS: Employer Training Expenditure and Practices 2001/20, and HHES: Household Expenditure Survey 2003/04).

The access to the national data was prepared by consultations (oral or email) with representatives from the ministries, the statistical offices and the employment

agencies of the respective countries (see the Annex for detailed information about the data gathering).

Despite for the European countries comparative data bases were used for the two actors' categories of enterprises and individuals, much work of making the data comparable was necessary even for this more standardized kind of data. The observation of public funding needed even more conceptual work. So the observed data must be classified to a high degree as estimations rather than observations.

Several procedures of making the data directly comparable were necessary (the German report displays the detailed procedures, see also the Annex tables which demonstrate the transformations), the main of these can be summarized as follows:

- Definition of adult education: we used the definition of non-formal vocational and general adult education from the AES (EC 2005 and STATA 2009) and applied generally an age criterion of participant at 25 years or older; some demarcation problems arise in public funding with formal adult education in particular for tertiary education (specifically defined expenditure for further education was included in Scotland, Australia, and Austria)
- Definition of expenditure: the expenditure of individuals and enterprises cover only the direct costs, the public expenditure also includes indirect costs, because they could not be identified in some countries in a comparative way (e.g., the living expenses for participants in labour market training), so the comparison to some extent overestimates public expenditure, and underestimates private expenditure (the annex presents the estimations by country by the available categories).
- Public/state expenditure: the public expenditure is reported for initial education in a standardized way (UOE survey: UNESCO, OECD, EUROSTAT reporting procedure published periodically in OECD Education at a Glance), however, in adult education only the expenditure for labour market training as part of active labour market policy is regularly collected and reported by OECD and EUROSTAT data. The data about the different categories of expenditure were collected from the public authorities of the selected countries by email-survey.
- Individuals' expenditure: the AES survey has collected data about the expenditure of households for non-formal adult education in 2005-07 (Sweden and U.K. 2005-06, Finland 2006, Austria 2007), the data from Australia were collected in 2003-04.
- Enterprises' expenditure: the data about enterprises (EU countries CVTS 2005-07, Australia TEPS 2003) underestimate the expenditure as they do not cover the

complete economy (the CVTS excluded enterprises with less than 10 employees and most branches of the public sector; TEPS does not restrict the size of enterprises, but also does not cover the whole economy).

- Time and units of comparison: As shown, comparative data were collected at different points in time, so the year of comparison was standardised to 2009; the purchasing power (PPP) was standardized using the parities (PPP) for GDP and related indicators in 2009; to control for the different size of countries the expenditure was uniformly estimated by the US \$ Purchasing Power Parities per capita of the 25-64-years old population; it must be taken into account, that the analysis does not catch the changed situation according to the post 2008 economic and financial crises, but rather the situation before that.

- Participation: Participation is mainly analysed on basis of the European sources (AES and CVTS, Australia is mostly not comparable, and Great Britain must be compared instead of Scotland). Only crude variables are available for these purposes: sex/gender, marital status, citizenship, country of birth, language, education credentials, employment status and criteria as position, occupation, size of enterprise; with respect to non-formal adult education the distinction between vocational and general AE was also used, and participation in formal AE was also considered.

The research design includes two steps: first the comparative estimation of the expenditure by the actors' categories (individuals, enterprises, the state, labour market policy) per capita of the population is presented; second the results about the expenditure are related to available indicators of participation, in order to identify rough patterns across the selected countries from the different welfare regimes, and to confront the expectations presented above.

## **4. Results**

The results did not match the expectations in more than one key aspect, thus the methodology as well as the conceptual framework must be questioned and further developed, taking into account the more recent theorising and analyses.

### *4.1 Comparison of expenditure by actors' categories in selected countries*

Table 1 presents the main indicators about the expenditure in the selected countries standardised per capita of the 25-65 years old population. Against the expectations

the overall expenditure was highest in Austria (index 1.16 against the average), and there was no communality of Nordic vs. liberal countries (Australia and Sweden ranging at average, and Finland and Scotland/GBR slightly below). The comparatively high expenditure in Austria results from substantially higher individual contributions (index 2.39), thus the individual contributions make up a much higher share of the overall financing (21%) than in the countries selected for comparison (between 5% in Australia and 9% in Sweden); furthermore, the individual contributions are substantially higher in Nordic countries (index around 0.8) than in liberal countries (index around 0.5) – the individual market contributions to non-formal adult education are thus lower in liberal than in Nordic countries.

The contribution of the enterprises, which is underestimated overall in the data, is comparatively similar across the selected countries (34% to 44%). It is highest in Sweden (index 1.18, 44%), followed by Australia (index 1.08, 41%) and Austria (index 1.05, 34%). If we count the sum of individual and enterprise contributions as private contributions, this proportion is highest in Austria (55%, index 1.34) and Sweden (54%, index 1.11), and there is no common pattern according to the welfare regimes, as in Scotland/GBR (41%, index 0,75) and in Finland (43%, index 0.85) the private contributions are lowest.

The combined state and labour market training expenditure (sum public) is quite similar, and does not show a consistent pattern across the welfare regimes (Sweden ranges lowest at index 0.91, and Australia and Finland highest at 1.05, with Austria and Scotland/GBR at average). The two components of public expenditure, state funds and labour market training are distributed very differently and against expectations. The state expenditure is highest in the liberal countries followed by Sweden, whereas in Austria and Finland the dominating part of the public expenditure is spent via labour market policy (Sweden has substantially reduced labour market policy expenditure shortly before the point of estimation: in 2009 this part of financing was only about one fifth of 2006).

In sum, unexpectedly individuals in Austria spend comparatively much for non-formal adult education. The enterprises contributions differ less between selected countries, showing no consistent pattern across welfare regimes. State financing is highest in the liberal countries, whereas private sources -- in particular individuals – contribute comparatively little to non-formal AE in this regime.

Table 1: Per-capita expenditure for non-formal adult education (NFAE) in selected countries, 2009, USDPPP

<b>Absolute USDPPP</b>	AUT	FIN	SWE	SCO/GBR	AUS
State budgets	48	77	231	279 <sup>x</sup>	286
Active labour market policy	232	220	26	8 <sup>y</sup>	10
<i>Sum public</i>	280	297	257	287 <sup>x,y</sup>	296
Enterprises	217	180	244	167 <sup>y</sup>	222
Individuals non-formal AE	134	43	47	30 <sup>y</sup>	27
<i>Sum private</i>	351	223	291	197 <sup>y</sup>	249
<b>Total NFAE per-capita 25-64y pop.</b>	<b>631</b>	<b>519</b>	<b>548</b>	<b>484<sup>x,y</sup></b>	<b>545</b>
<b>Per cent of total per-capita expenditure</b>					
State budgets	8%	15%	42%	58% <sup>x</sup>	52%
Active labour market policy	37%	42%	5%	2% <sup>y</sup>	2%
<i>Sum public</i>	44%	57%	47%	59% <sup>x,y</sup>	54%
Enterprises	34%	35%	45%	35% <sup>y</sup>	41%
Individuals non-formal AE	21%	8%	9%	6% <sup>y</sup>	5%
<i>Sum private</i>	55%	43%	54%	41% <sup>y</sup>	46%
<b>Total NFAE per-capita 25-64y pop.</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%<sup>x,y</sup></b>	<b>100%</b>
<b>Index (average of sel. countries = 1.00)</b>					
State budgets	0.26	0.42	1.26	1.52 <sup>x</sup>	1.55
Active labour market policy	2.34	2.22	0.26	0.08 <sup>y</sup>	0.10
<i>Sum public</i>	0.99	1.05	0.91	1.01 <sup>x,y</sup>	1.05
Enterprises	1.05	0.87	1.18	0.81 <sup>y</sup>	1.08
Individuals non-formal AE	2.39	0.77	0.84	0.54 <sup>y</sup>	0.48
<i>Sum private</i>	1.34	0.85	1.11	0.75 <sup>y</sup>	0.95
<b>Total NFAE per-capita 25-64y pop.</b>	<b>1.16</b>	<b>0.95</b>	<b>1.00</b>	<b>0.89<sup>x,y</sup></b>	<b>1.00</b>
<b>Additional Indicators</b>					
Individuals formal AE (abs. USDPPP)	81	17	40	51 <sup>y</sup>	n.a.
GDP per-capita (OECD 2009) <sup>1</sup>	38.823	35.237	37.163	35.159 <sup>y</sup>	39.660
Tot.NFAE per-cap.25-64J/GDP per-cap.	1,6%	1,5%	1,5%	1,4% <sup>y</sup>	1,4%
Pop. 25-64 (OECD 2008, 1.000s)	4.624	2.889	4.854	2.790 <sup>x</sup> 32.429 <sup>y</sup>	11.739
Employment rate (OECD 2009)	76%	76%	81%	77% <sup>y</sup>	77%

<sup>1</sup>GDP 2009, USD purchasing power parities (PPP); <sup>2</sup>Total expenditure related to the 25-64y population, GDP to the total population, thus this proportion must not be confused with the proportion of AE expenditure of GDP; pop.= population; <sup>x</sup>Scotland, <sup>y</sup>Great Britain; AUT=Austria, FIN=Finland, SWE=Sweden, SCO/GBR=Scotland/Great Britain, AUS=Australia. Source: own calculations, EUROSTAT, OECD, Australian Bureau of Statistics ABS.

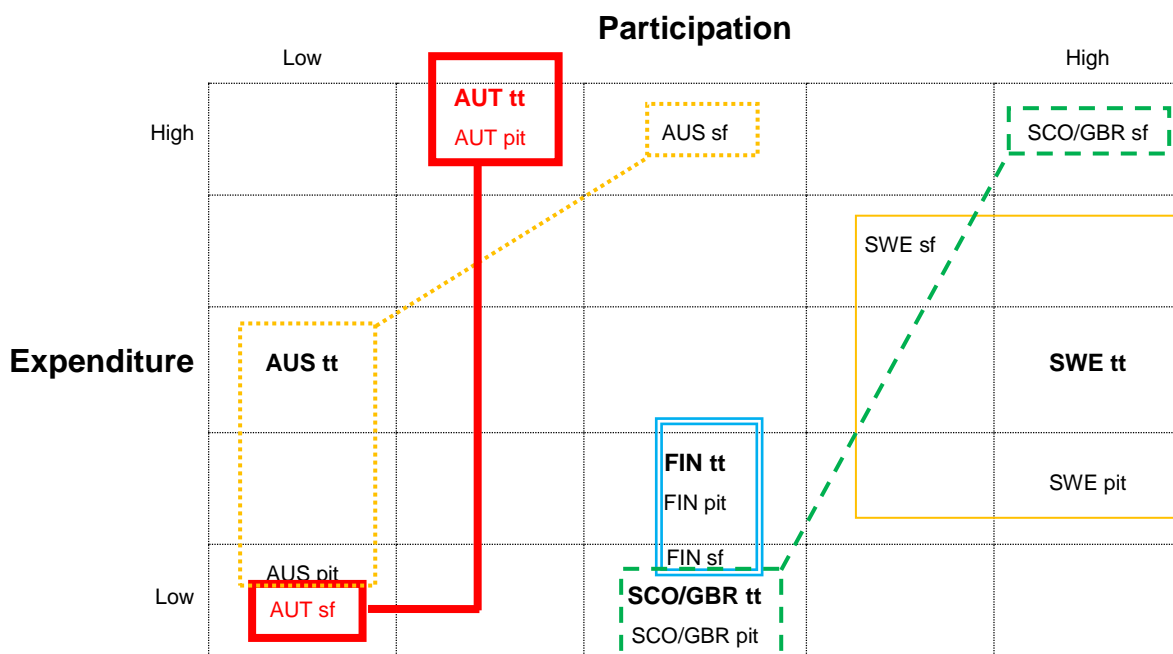
#### 4.2 Stylized patterns of participation in the selected countries

Measurement of participation is a key element in European and international policy making, and has been quite extensively theorised and analysed in recent decades. In contrast to financing, comparative indicators are available to this aspect from OECD and EU, and they are also used in the political discourses. However, these Indicators are still very crude, and the measurement is impaired by much lack of clarity: E.g., the data gathering has been refined in Europe at some points in time, so the European time series reflect a mixture of real and definitional changes, which are difficult to distinguish; moreover, different indicators are used (participation during four weeks before survey, or during one year), and different observations in different surveys give quite different results (e.g. Labour Force survey, Adult Education Survey and Continuing Vocational Training Survey). Consequently, caution is

necessary with interpretations, nevertheless, exploration and use of the data can gradually contribute to clarification.

Basically the rough indicators of participation are not related to the indicators of financing, with one exception: the state expenditure is positively related to formal adult education. Because we have been particularly interested in impacts of individual market related expenditure and of state expenditure, we have looked at the pattern among the selected countries and welfare regimes according to the comparative level of three stylised attributes that combine funding and participation: (i) total funding and total participation, (ii) private individual funding and total participation, and (iii) state funding and formal participation. Figure 1 illustrates these attributes in the selected countries.

Figure 1: Schematic representation of funding and participation patterns



Legend: positioning of countries signals levels of... tt = total expenditure & total participation; pit = private individual expenditure & total participation; sf = state expenditure & formal participation

Using these stylized attributes a certain pattern among welfare regimes is visible that is to some extent in line with the expectations, and in other respect contradicts them: - the Nordic countries show by and large a comparatively medium to high position with respect to participation, but rather a comparatively medium to low position with respect to expenditure; the three indicators are comparatively homogenously positioned, and state expenditure is not particularly high; if we take the tt-total

expenditure & total participation positioning as a main quality attribute, these countries rank relatively favourable;

- the liberal countries show by trend a polarized picture, with comparatively low to medium participation and low to medium expenditure at the broader indicators on the one hand, however, medium to high formal participation with high state expenditure on the other; the individual contributions on the market are low in this regime; in terms of quality this regime shows consistently lower participation with lower expenditure;

- Austria with its conservative-corporatist welfare regime shows the least favourable pattern with high expenditure and medium to low participation, and a reverse polarisation between consistently low state funding with low formal participation, and high individual market contributions leading to comparatively low participation.

Table 2: Stylized participation in formal and non-formal learning compared to public and private financing in selected countries

<b>Adult education in 2007, % participation per year</b>					
	AUT	FIN	SWE	GBR	AUS*
<i>Formal and non-formal learning</i>					
Female	39,9	61,3	76,1	51,3	37,3
Male	44,0	48,9	70,8	47,2	38,8
<b>Total</b>	<b>41,9</b>	<b>55,0</b>	<b>73,4</b>	<b>49,3</b>	<b>38,1</b>
<i>Formal learning</i>					
Female	3,9	12,2	16,0	17,8	12,5
Male	4,4	8,2	9,6	12,3	11,0
<b>Total</b>	<b>4,2</b>	<b>10,2</b>	<b>12,7</b>	<b>15,1</b>	<b>11,7</b>
<i>Non-formal learning</i>					
Female	37,8	57,2	71,2	41,4	29,1
Male	41,8	45,2	67,7	39,2	31,7
<b>Total</b>	<b>39,8</b>	<b>51,2</b>	<b>69,4</b>	<b>40,3</b>	<b>30,4</b>
<b>Indices about participation and financing, selected countries relative to their average figures</b>					
	AUT	FIN	SWE	GBR	AUS*
<b>Indices Participation, average=1.00</b>					
Participation, formal and non-formal	0.81	1.07	1.42	0.96	0.74
Participation, formal	0.39	0.95	1.18	1.40	1.09
Participation, non-formal	0.86	1.11	1.50	0.87	0.66
<b>Indices expenditure, average=1.00</b>					
Total expenditure	1.16	0.95	1.00	0.89	1.00
Private individual expenditure	2.39	0.77	0.84	0.54	0.48
State public expenditure	0.26	0.42	1.26	1.52	1.55

\* Australia limited comparability, based on different source than European countries.

Sources: Participation: European Adult Education Survey 2007 (AES), Australian Multi-Purpose Household Survey 2006/07 (MPHS); Funding: see Table 1.

Table 3: Detailed indicators about participation and funding in European countries

**EXPENDITURE PER PARTICIPANT**  
**Individual and enterprise training**

	AUT	FIN	SWE	GBR
Participants, individual, AES formal learning (EUR)	1.454	153	393	438
Participants, individual, AES non-formal learning (EUR)	285	74	86	97
Enterprise, direct, CVTS (EUR PPS)	915	603	692	703
Enterprise, opportunity costs, CVTS (EUR PPS)	696	534	973	257
Enterprise, total (EUR PPS)	1.577	1.144	1.653	1.060

**SELECTIVITY OF PARTICIPATION**

**Educational background in individual adult education (AES)**

Index tertiary/lower secondary, formal AE	8.10	3.43	3.94	2.64
Index tertiary/lower secondary, non-formal AE	3.54	2.07	1.62	1.80

**Sex-gender, age, education in vocational AE and enterprise training**

Individual vocational participation (AES)				
Index female/male	.86	.98	.92	.90
Index old/young	.73	.84	.93	.77
Index tertiary/below secondary education	1.23	1.14	1.09	1.02

**Enterprise training (CVTS)**

Index female/male	.83	1.08	.96	.76
Index old/young	.58	1.36	.95	.76

Sources: European Adult Education Survey 2007 (AES); Continuing Vocational Training Survey (CVTS).

Table 3 shows some more detailed indicators about the costs and the selectivity of the different kinds of participation. We can see that the high individual and enterprise contributions on the market are related to comparatively high costs of participation, a pattern that cannot easily be interpreted as sign for efficiency – the mainly state funded formal participation in the other regimes bears markedly less costs. The selectivity indicators show particularly higher selectivity in terms of the educational background of the participants in Austria (differences also exist in the countries selected for comparison, but clearly much smaller ones).

#### 4.3 Summary of empirical results

First, the overall expenditure per capita was highest in Austria, in line with the highest expenditure by individuals, signifying rather a neoliberal policy approach than a corporatist one; second, there is no overall relationship between participation and expenditure in the selected countries, except that higher state expenditure is related to increased participation in formal AE; third, in terms of policy strategies the results do no point towards deliberate systematic patterns: Austria shows the most ‘neoliberal’ pattern, despite none of the actors would follow deliberately this strategy; in the liberal countries high state expenditure is combined with low to medium overall expenditure and low to medium overall participation. The corporatist regime is related



to high inequality of participation in terms of educational background, which is consistent with this regime; the market seems not to work particularly efficiently in this regime, as the costs of (low) participation are high.

## **5. Discussion and conclusions: the welfare regimes, the market, and confusion about institutions**

The project has started from a quite simple approach: (i) adult education, as every activity needs the necessary financial resources to be successfully provided and used; (ii) because of ambiguity about the reaping of returns the market cannot be expected to provide sufficient resources, therefore public resources are necessary and essential; (iii) financial resources are a main component of the overall resources needed and are more easy to provide politically, as compared to other resources, e.g., time or individual ingredients (motivation, competences, etc.); (iv) empirical observation and theoretical reasoning suggest that welfare regimes as different patterns of political intervention would make a difference in providing the necessary resources for adult education to flourish; (v) public intervention vs. the private market are commonly perceived as the main alternative and/or complimentary sources of raising financial resources (vi) the amount of available financial resources for adult education is widely unknown in a national as well as in a comparative perspective; (vii) a more full and sophisticated comparative observation and analysis of the provision of financial resources vis-à-vis the institutional structures of adult education would illuminate alternative paths of political intervention, in particular concerning the alternative between financing through the market vs. public intervention.

The observed patterns have widely not supported the expectations based on this approach. Main discrepancies between the results and the expectations are: (i) the amount of financial resources spent is less clearly related to the welfare regimes as well as to the rough patterns of participation than expected; (ii) the Austrian results are particularly striking, as on the one hand no one would have expected the highest amount of financial resources being spent in this country, and on the other hand this high amount of resources raised by the market corresponds to comparatively low participation and high inequality; (iii) the stylised patterns of financing and participation in the Nordic countries compared to the liberal ones are roughly compatible with expectations based on coordinated capitalism reasoning, as the interplay of state and private financing seem to work better in the Nordic than in the

liberal regime, however, the Austrian pattern somehow contradicts this argument (as the corporatist continental regime should be particularly able to coordinate these elements). The exceptional role of the market, which seems not to work efficiently, cannot be easily explained by the regime theory.

We have to consider the explorative nature of the observation and analysis as a caveat. The estimation of the resources only covers one point in time (2009), which might be more or less representative for the situation in the selected countries. Thus deeper institutional analysis would be necessary to validate the patterns observed. A main question would be how much the Nordic regime has been actually already in fact liberalised. Moreover, the combination of the different sources of information includes much recalculation and standardisation (e.g., by transforming information about different years into 2009 in many aspects), and might be a source of error. Nevertheless, the attempt can demonstrate first the lack of this important information, and second the difficulties in solving the various challenges in this area of comparative research.

A basic question behind the project was whether the politically deliberate state financing of educational institutions according to an educational programmatic or the push towards the political establishment and support of incentives and market mechanisms according to the preferences of the (potential) participants would be more appropriate for the development of adult education. A basic assumption, according to the literature, was that the Nordic regime would represent the first alternative and the liberal regime the second, with the corporatist Austrian regime lying somehow in between the two, with some potential in either direction.

A critical topic that distinguishes the two alternatives is whether adults still need education (or just learning), and if this difference exists, who should be the educators. The learner centred market approach assumes that adults are already educated, and know what they need to learn, and in principle will also be able to find ways to do this – the purposes of learning are assumed to be quite instrumental, with learning for work and professions as the main field. The educational approach assumes alternatively that there still are educational purposes in adult education that go beyond the instrumental ones, and concern learning for (the wider aspects and dimensions of) life, represented by the social, political, and cultural fields, that include moral and ethical deliberation, and the wider fields of human knowledge production.

The problem is that these questions cannot be really explored with the rough information about welfare regimes, financing, and participation. The main component related to these aspects is the contextual understanding of the AE institutions and policies and their traditions, which is only very indirectly represented by the quantitative measurement. With respect to research and theory, a main path of reasoning of the last decades was to underpin the abstract macro level information and theorising by analyses at the micro and meso level, in particular by studying the barriers and motivations at the individual micro level, and including this dimension into multi-level models (Boeren, Nicaise, Baert 2010). On the one hand this research has contributed to better understanding, on the other hand the question arises, to which extent this kind of reasoning and theorising has guided the attention towards the rational choice ideology and towards the strengthening of market behaviour at the 'cost' of moral and ethical behaviour. Moreover, this model has focused at the interaction between the individuals (micro) and the institutions (meso), and integrated the macro level, however, which also was to some extent pushed aside.

In more general terms the question might be asked to which extent the market becomes an alternative educational institution that replaces moral and ethical reasoning through a rational cost-benefit calculation among alternative preferences. In this vein the decision about participation and also about more general policy decisions is modelled according to human capitalist cost-benefit calculations, with the inclination to transform the various and multidimensional potential effects of adult education into a form of 'wider benefits' to stand the cost-benefit rationality. The human capital approach with its basic logic of discounting costs and benefits has much suggestive power, so that it has invaded most thinking about adult education by imposing the basic framework of supply and demand to the roots of reasoning, and furthermore to think about incentives (or sanctions) in order to influence the actors' assumed rational behaviour.

Rees (2013) tries to escape this logic, and proposes much more detailed analyses, starting with a combination of the welfare regime approach with the varieties of capitalism approach, that has distinguished the liberal market economy from the coordinated market economy. In this vein Austria would fall together with the Nordic countries in the coordinated regime. However, this would not really help to explain the unexpected results.

## 6. Significance in connection to the conference themes

Sufficient funding is a key ingredient for the future of adult education, and the funding mechanisms are related to the power structure, and thus also influence the potential of adult education for progressive social change. The paper discusses many aspects and dangers related to the current market rhetoric, which undermines the political potential of public adult education.

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## ANNEX

### A.1 Instrument for data gathering (text and tables to fill in)

#### Annual expenditure on adult learning

One key question of our comparative study conducted on behalf of the Austrian Chamber of Labour concerns the expenditure on adult/non-formal education in your country and the basic structure of financing from public sources (government, public employment service) and private sources (expenditure of firms and individuals). We understand **non-formal education** (following the definition used in the Adult Education Survey, AES) as:

*any organised and sustained educational activities that do not correspond exactly to the definition of formal education (education provided in the system of schools, colleges, universities and other formal educational institutions that normally constitutes a continuous "ladder" of full-time education for children and young people, generally beginning at the age of five to seven and continuing up to 20 or 25 years old). Non-formal education may therefore take place both within and outside educational institutions.*

We are interested in educational activities that take place after initial education. As a rule of thumb, one can consider an adult learner as a person who is 25 years old or older and engages in non-formal learning. In any case, please specify the definitions applied for the data you report. Please fill in the results and make a **clear description of the figures** below (reference year, definition used, etc.)! If there is no data available, please provide the most comparable information or estimations.

#### 1. Annual public expenditure on adult learning

	reference year: 2008 <sup>1</sup>
<b>Annual public expenditure on adult learning</b>	
Non-formal education, thereof	currency
central government expenditure	currency
regional government expenditure	currency
local government expenditure	currency
<b>Public employment service</b>	
Training (as part of active labour market programs, ALMP), thereof	currency
direct costs	currency
indirect costs	currency
ALMP-Funding of youth aged 15 to 24 (not to include in overall figures)	currency

<sup>1</sup> Please indicate if another reference year is used.

Are there any special programs for migrants and what is the annual public expenditure on these programs?

	Reference year:
Special programs for migrants	currency

Source:

#### 2. Annual expenditure of enterprises

Are there any official statistics concerning the annual expenditure of enterprises on training of their employees? If yes, please note these figures and relevant data in the box below and describe the definitions used. (Note: expenditure on apprenticeship training programs should not be included since it is mostly part of initial education).

Description of official statistics	Reference year:	Total
		currency
...orig. 4 additional rows		currency

What other national and international survey data are available, e.g. estimations according to national surveys, the European Continuing Vocational Training Survey (CVTS3) etc.? Please also mention references, relevant publications and data concerning the annual expenditure of enterprises on adult learning.

Description of survey data	Reference year:	Total
		currency
...orig. 4 additional rows		currency

#### 3. Annual expenditure of individuals

Are there any official statistics concerning the annual expenditure of individuals on adult learning (Total expenditure, thereof expenditure on vocational training activities)? What other national and international survey data are available, e.g. estimations according to national surveys, the European Adult Education Survey, AES?

Please note the official figures (if available) and/or relevant survey data in the box below and describe the definitions used. Please also mention references, relevant publications and data concerning the annual expenditure of individuals on adult learning.

	Reference year:	Total expenditure	Thereof vocational training
1. study:			currency
2. study:			currency
3. study:			currency
...orig. 3 additional rows			

Thank you very much for your participation!

## A.2 Institutions and number of persons contacted in selected countries

Finland: 1 person Finnish National Board of Education; 1 person Education Statistics, Statistics Finland

Sweden: 3 persons Ministry of Education and Research, Division for Student Financial Support and Adult Education; 1 person Unit for Education and Jobs, Population and welfare department, Statistics Sweden

Scotland/Great Britain: 1 person Scottish Government, Analytical Services, Lifelong Learning Statistics; 1 person Skills Development Scotland; 1 person Scottish Funding Council; 1 person Customer Advisor, Customer Intelligence, Office for National Statistics; 1 person Higher Education Statistics Agency (HESA); 1 person UK Government, Department for Business, Innovation and Skills (BIS)

Australia: 1 person Australian Government, Department of Education Employment & Workplace Relations, Adult Community Education (ACE) Action Group; 1 person Ministerial Council for Tertiary Education and Employment (MCTEE); 1 person Research Management, National Centre for Vocational Education Research Ltd.; 3 persons Australian Bureau of Statistics (from National Centre for Education & Training Statistics, Systems, Quality and Client Unit Public Finance Section, and International Accounts and Financial Statistics Branch Public Finance Section)

## A.3 Detailed expenditure in selected countries

Table A1: Observed expenditure in Austria

	Currency (orig.obs.), total sum	Standardized f.time (GDP-Deflator 2009) and purchasing power	Standardised for 25-64y population
	Mio. EUR (year of observation)*	Mio. USDPPP (2009)	UDDPPP/25-64y pop. (2009)
<i>State budgets (own observation, all 2009)</i>	187	221	48
Central government	78	92	20
thereof agreement for integration migrants	3	3	1
All regional governments	62	73	16
Communes (local government)	48	57	12
<i>Active labour market policy training (own observation, 2009)</i>	906	1.072	232
<b>Total public (state and ALMP)</b>	<b>1.093</b>	<b>1.293</b>	<b>280</b>
	EUR/pop.** (year of observation)*	USDPPP/pop.** (2009)	USDPPP/25-64y pop (2009)
Expenditure of enterprises (per employee, Eurostat CVTS3, 2007, 54% older than 25y)	305	404	217
Expenditure of individuals (per participant, Eurostat AES, 2006)	285	389	134
<b>Total 25-64, USDPPP 2009</b>			<b>631***</b>

\*different years of observation indicated in row-category descriptions; \*\* pop = population according to surveys: CVTS employees, AES 25-64y.; \*\*\* indicators of this column used for comparison, this figure = sum of total public + enterprises + individuals per 15-64y population

Source: own observation Austria, Statistics Austria, Eurostat.

Table A2: Observed expenditure in Finland

	Currency (orig.obs.) total sum	Standardized f.time (GDP-Deflator 2009) and purchasing power	Standardised for 25-64y population
	Mio. EUR (year of observation)*	Mio. USDPPP (2009)	PPP/25-64y pop. (2009)
<i>State budgets (own observation)</i>	201,5	221,5	77
Central government (2008)	151,0	165,9	57
Regional government (2008)	-	-	-
Local government (2008)	17,5	19,3	7
Migrant training (2009)	32,0	35,2	12
Migrants teacher training (2009)	1,0	1,1	0
<i>Active labour market policy training (own observation, 2009)</i>	579,0	636,3	220
Direct costs	233,0	256,0	89
Indirect costs	346,0	380,2	132
Youth (not included)	97,0	106,6	-
<b>Total public (state and ALMP)</b>	<b>780,5*</b>	<b>857,8</b>	<b>297</b>
	EUR/pop.** (year of observation)*	USDPPP/pop.** (2009)	USDPPP/25-64y pop (2009)
Expenditure of enterprises (per employee, Eurostat CVTS3, 2006, 58% older than 25y)	235	312	180
Expenditure of individuals (per participant, Eurostat AES, 2006)	74	83	43
<b>Total 25-64, USDPPP 2009</b>			<b>519***</b>

\*different years of observation indicated in row-category descriptions; \*\* pop = population according to surveys: CVTS employees, AES 25-64y.; \*\*\* indicators of this column used for comparison, this figure = sum of total public + enterprises + individuals per 15-64y population

Source: own observation Finland, Eurostat, OECD.

Table A3: Observed expenditure in Sweden

	Currency (orig.obs.) total sum	Standardized f.time (GDP-Deflator 2009) and purchasing power	Standardised for 25-64y population
	Mio. SEK (year of observation)*	Mio. USDPPP (2009)	PPP/25-64y pop. (2009)
<i>State budgets (own observation, 2009)</i>	16.148	1.120	231
<b>REGIONAL CLASSIFICATION</b>			
Central government	4.596	353	73
Regional government	5.718	306	63
Local government	5.834	441	91
<b>INSTITUTIONAL CLASSIFICATION</b>			
Municipal adult education	3.689	256	53
Adults w. intellectual impairment (88% 25-64)	205	20	4
Swedish tuition for immigrants (62% 25-64)	1.735	156	32
Folk high schools (45% 25-64)	6.950	350	72
Study associations (100% 25-64)	2.234	250	51
Advanced vocational ET (59% 25-64)	1.335	88	18
<i>Active labour market policy training (own observation, 2009, 95% 25-64y)</i>	1.191	126	26
<b>Total public (state and ALMP)</b>	<b>17.339</b>	<b>1.247</b>	<b>257</b>
	EUR/pop.** (year of observation)*	USDPPP/pop.** (2009)	USDPPP/25-64y pop (2009)
Expenditure of enterprises (per employee, Eurostat CVTS3, 2005-06, 56% employees older than 25y)	318	433	244
Expenditure of individuals (per participant, Eurostat AES, 2007)	86	69	47
<b>Total 25-64, USDPPP 2009</b>			<b>548***</b>

\*different years of observation indicated in row-category descriptions; \*\* pop = population according to surveys: CVTS employees, AES 25-64y.; \*\*\* indicators of this column used for comparison, this figure = sum of total public + enterprises + individuals per 15-64y population

Source: own observation Sweden, Eurostat, OECD.



Table A4: Observed expenditure in Scotland/Great Britain

	Currency (orig.obs.) total sum	Standardized f.time (GDP-Deflator 2009) and purchasing power Mio. USDPPP (2009)	Standardised for 25-64y population
<b>Scotland</b>	Mio. GBP (year of observation)*	Mio. USDPPP (2009) (25y+)	PPP/25-64y pop. (2009)
<i>State budgets (own observation, 2008/09)</i>	901	783	279
Scottish Further and Higher Education Funding Council (davon 53% FE, 25+, Scotland's Spending Plans and Draft Budget 2001-12)	632	527	189
Other Lifelong Learning Scotland	266	251	90
thereof Engl. f. speakers of other languages	3	5	2
<b>Great Britain</b>	Mio. EUR25-PPStd. (year of observation)*		
<i>Active labour market policy training for Work, New Deal 25+ (GBR, Eurostat 2008, Mio. EUR25-PPStandards)</i>	175	260	8
<b>Total public***</b>	-	-	<b>287</b>
	EUR/pop.** (year of observation)*	USDPPP/pop.** (2009)	USDPPP/25-64y pop (2009)
Expenditure of enterprises (per employee, Eurostat CVTS3, 2005-06, 52% employees older than 25y)	232	319	167
Expenditure of individuals (per participant, Eurostat AES, 2007)	97	78	30
<b>Total 25-64, USDPPP 2009</b>			<b>484****</b>

\*different years of observation indicated in row-category descriptions; \*\* pop = population according to surveys: CVTS employees, AES 25-64y.; \*\*\* no total sum possible; \*\*\*\* indicators of this column used for comparison, this figure = sum of total public + enterprises + individuals per 15-64y population  
Source: own observation Scotland, Eurostat, OECD.

Table A5: Observed expenditure in Australia

	Currency (orig.obs.) total sum	Standardized f.time (GDP-Deflator 2009) and purchasing power Mio. USDPPP (2009)	Standardised for 25-64y population
	Mio. AUD (year of observation)*	Mio. USDPPP (2009) (25-64y)	PPP/25-64y pop. (2009)
<i>Staatliche Budgets (eigene Erhebung)</i>	4.970	3.358	286
Tertiary education (16,4%** of total for certificates 25-64, 2008/09, Governance Finance Statistics)	3.755	2.537	216
Community adult learning (2005/06)	77	52	4
Dept. of defence, immigration, family	1.118	756	64
Workplace literacy	15	10	1
Indigenous training	4	3	0
<i>Active labour market policy training (eigene Erhebung 2009, 95% 25-64)</i>	167	113	10
<b>Total public (state and ALMP)</b>	<b>5.137</b>	<b>3.471</b>	<b>296</b>
	AUD/pop.** (year of observation)*	USDPPP/pop.** (2009)	USDPPP/25-64y pop (2009)
Expenditure of enterprises (per employee, ABS TEPS 2001/02, 51% employees older than 25y)	458	435	222
Expenditure of individuals (per participant, ABS Household Expenditure Survey, 2004/05)	139	72	27
<b>Total 25-64, USDPPP 2009</b>			<b>545****</b>

\*different years of observation indicated in row-category descriptions; \*\* 16,4% of participants in tertiary programmes (non-school qualifications) study at Certificate-Level und are 25-64 years old, they are classified as adult education; \*\*\* pop = population according to surveys: CVTS employees, AES 25-64y.; \*\*\*\* no total sum possible; \*\*\*\* indicators of this column used for comparison, this figure = sum of total public + enterprises + individuals per 15-64y population  
Source: own observation Australia, Australian Bureau of Statistics (ABS), OECD