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

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

• it is intentional — learners are aware that they are learning;
• it has a definite, specific goal, and it is not aimed at vague generalisations such as
developing the mind;
• this goal is the reason why the learning is undertaken, and is not motivated sim­
ply by factors like boredom;
• and the learner intends to retain what has been learned for a considerable period of time.

The notion of lifelong learning wasn’t acknowledged by the Hong Kong Government until the 1970s, and the creation of the Open Learning Institute (OLI) in 1989 was a milestone in the development of one component within the lifelong learning infrastructure. However, in spite of this acknowledgement, later coupled with the development of the OLI, the government continues to play a limited role in the promotion of formal lifelong learning, and continuing education specifically. An historical account is necessary for a full appreciation of the implications of government policy in this context. This paper includes an overview of the development of continuing education in Hong Kong, an examination of the learner profile, and a discussion of the economic implications coupled with recommendations for government policy makers.

DEVELOPMENT OF CONTINUING EDUCATION IN HONG KONG

In the 1950s, the concept of continuing education in the sense of providing education beyond the typical school leaving age had only just emerged. At this time, the Adult Education section of the Department of Education and the Kaifong (Neighbourhood) Associations organized remedial education for adults, while the Department of Extramural Studies of the University of Hong Kong (renamed as School of Professional and Continuing Education in January of 1992) was visible but quite small in scale. In 1956-57, the Extramural Studies Unit offered only 12 courses with a total enrolment of 330 students. A decade later, the Extramural Department (renamed the School of Continuing Studies in 1994) of the Chinese University of Hong Kong was established. At that time, the two universities were unique in offering relatively higher level, intellectually oriented courses to a small minority of well educated adults. However, only a year later, Caritas Hong Kong, a religious voluntary organization, established its Continuing and Adult Education Section (now renamed as Caritas Adult and Higher Education Service) to provide education for adults.

As the economy grew, the seventies saw a surge in demand for personal interest and vocational courses. Enrolment at the Hong Kong University Extramural Department grew from 5,808 in 1971-72 to 22,774 in 1981-82, an increase of 292%. Similarly, enrolment at the Chinese University Extramural Department during this same period jumped from 13,422 to 31,852, an increase of 137% (Chung, Ho, Liu, 1994, p. 16). Supporting this growth, the Department of Extramural Studies (renamed as the School of Continuing Education in 1983) of the Hong Kong Baptist College was created in 1975.

By 1978 the Hong Kong Government began paying attention to lifelong learning, recognizing in a White Paper that, in principle, education is a continuing lifelong process and that the development of educational opportunities for mature students should be welcomed. A scheme for supporting certain voluntary organizations in order to encourage them to organize and offer remedial courses, of a type specifically designed to meet the needs of adults lacking a strong, basic-level, formal education, was introduced. However, it was stated explicitly that other private providers
of adult education courses would not be subsidized by the government since mature students generally were expected to meet lifelong learning costs with their own earnings. The thrust of the policy for developing adult focused remedial courses was meant to assist and encourage voluntary organizations to complement and supplement the Hong Kong Education Department's own courses. The idea that adult and tertiary education would develop side by side to an appropriate extent if an open education centre was developed had also been expressed (Government Secretariat, 1981, p. 41).

In 1979, the government formed the Advisory Committee on Diversification. The Committee's task was to recommend appropriate responses to the consequences that were resulting from the quotas which had recently been introduced by the United States and other western countries on Hong Kong textile products. This Committee drew attention to the fact that adult education could be a retraining tool, creating cost effective, accessible, upgrading opportunities for out-of-work textile workers who were unable to enrol in full-time formal education. More broadly, it was noted that adult education could also play a pivotal role in the general upgrading of Hong Kong's labour force. Accordingly, the Committee recommended that the government embark on an in-depth study aimed at developing a clearer definition of the purpose of adult education in Hong Kong, and identify specific strategies for the support and coordination of adult education programming. Also recommended was consideration of the development of a Hong Kong open education centre with flexible entry requirements. This centre would provide education for mature students and emphasize self-learning. In 1981, the government admitted that "the adult and continuing education field was very fragmented and it was difficult to obtain hard facts on which a coordinated policy could be based" (Government Secretariat, 1981, p. 39). Following this, however, the government continued to fail at coordinating the efforts of adult and continuing education providers, and tremendous duplication of activities resulted. The problem of duplication has been particularly serious in hobby, language and secondary education courses provided by government departments and voluntary agencies. During this same time period, the government invited a Panel of Visitors to undertake an overall review of the education system of Hong Kong. The Visiting Panel recommended that:

\begin{quote}
all members of society should have an equal opportunity of realising their interests and aptitudes. Because education is accepted as significant in enabling the individual to remain in touch with the changing social and physical environment and in obtaining status, justice demands that access to education be broadened. (Government of Hong Kong, 1982, pp. 73-4).
\end{quote}

The Centre for Professional and Continuing Education of the Hong Kong Polytechnic (renamed the Hong Kong Polytechnic University in November 1994) and the School of Continuing and Professional Education of the City Polytechnic of Hong Kong (renamed the City University of Hong Kong in November 1994) were created in 1988 and 1991 respectively. During this same period, many professional bodies and commercial ventures entered the continuing education field. To this day,
these providers vary in size and breadth of operation. Some are departmental extensions of large tertiary institutes, while others are stand-alone operators employing skeleton staffs. Courses range widely, from interest and leisure classes, through to professional qualifications programming. Duration also varies widely. Awards include certificates of attendance, diplomas and degrees. With only a few exceptions, most of the providers are not under the scrutiny of any academic accreditation or validation body; therefore, the standards and quality are not monitored and there is no assurance offered to the learners. Interestingly, and despite the large number of education providers, opportunities to pursue formal degrees are limited.

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

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

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

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

PROFILE OF LIFELONG LEARNERS IN HONG KONG

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

Chan and Holford's study (1994) surveyed a random group of 325 Hong Kong citizens. The following summary, pulled from Chan and Holford's study, paints a general profile of those engaged in formal lifelong learning activities. (Percentages have been rounded to the nearest whole number.) The majority (51%) of the sample was between 20 and 34 years old. Sixty per cent were married, and of those 87% had
children. Three-quarters of the respondents had completed only secondary school education or less, 17% per cent had studied at the post-secondary non-degree level, and 7% at the degree level or above. Approximately one-third of the sample group were not in paid employment. These included housewives, students, unemployed and retired persons. The employed group consisted of blue-collar workers (22%), white-collar workers (23%), and professionals and executives (22%). The overall percentage of respondents who had attended at least one course in the past 12 months was quite high (23%). More females (55%) than males (45%) participated in continuing education, and the participation rate was higher for younger people, especially for those between 20 and 34 years of age. The participation rate for married respondents was 17%, while the rate for single respondents was 32%. Twenty-three per cent took courses that lasted more than 100 hours, the type of study which tends to contribute towards a qualification such as a certificate, a diploma or even a degree. Some 26% of course participants received sponsorships from their employers, mostly in the form of refunds for course fees. As one might expect, the course providers were quite varied. However, of the 139 respondents that studied part-time, only 19% enrolled in the continuing education divisions or the part-time programs of the HEIs and the OL. Many more (36%), enrolled in courses that were provided by private organizations. The lifelong learners described motivating factors as including the need for “self-development”, the need “to improve job skills”, and the desire “to fulfil interest”. Monetary rewards, including promotion and salary increases, though important, “did not appear to be the main forces driving Hong Kong people to take part in continuing education” (Chan & Holford, 1994, p. 80). Upgrading academic or professional qualifications was important, and more than one-third of the respondents identified this as a major factor. Deterrents included the lack of time, inconvenient meeting time/place, lack of course information, high cost and the lack of self-confidence.

The study by Chung et al. (1994) included 3,998 students enrolled in the continuing education units of the HEIs and the OL. Both the award-bearing and non-award-bearing students were predominantly female (59%), single (69%) and below the age of 30 (62%). For the purpose of comparison, the characteristics of the labour force as reported in the General Household Survey of 1994 First Quarter were used as benchmarks. In terms of occupational distribution, the fastest growing industries in the economic restructuring process, including finance, insurance, real estate, business services, and community, social and personal services, are over-represented in the continuing education programs. Under-represented occupations include manufacturing, construction, wholesale/retail, restaurant/hotel, and import/export. Workers of different tenure and those planning for occupational shifts are motivated by different forces to enrol in award-bearing continuing education courses. Long tenure workers are more concerned with consumption related factors such as “intellectual pursuit” and “social service”. Short tenure workers are more motivated by the perception of job-related benefits such as “applicability to present job” and “helpfulness to job change”. Continuing education appears to be meeting adult students’ needs and, according to their subjective assessment, is reasonably effective in upgrading knowledge, re-training, and teaching new skills that may bring subse-
quent labour market benefits that include promotions, job enhancements and career changes.

The study by Watt (1994) surveyed 731 students enrolled at the OLI. Unlike the findings from the previous two surveys, where females represent more than half the participants, 56% per cent of the OLI respondents were male. Almost half of them (48%) were in the 26 to 35 age group. Slightly more than a quarter (27%) were 25 years of age or younger, and another quarter (24%) were between 36 and 45 years of age. Sixty per cent of the respondents were single, and only 28% of those who were married had children. Ninety-four percent of the respondents did not have a degree. Most were engaged in clerical, technical and administrative jobs in the tertiary industries. In general, the learners were motivated by "cognitive interest", "professional advancement", "social contact" and "social stimulation". The male learners tended to be more oriented towards "professional advancement" and "emigration considerations". Students undertaking business courses looked for pragmatic "job enhancement" while arts students pursued "cognitive interest". Married learners and those with children were more inclined to be motivated by "emigration considerations".

In summary, the three surveys document striking similarities among lifelong learners in terms of sex, age, marital status, occupations and motivation for learning. The ratio of male to female learners and the fact that a majority of the female learners are employed reflects the fact that female workers have become an increasingly large and important component of the labour force. In a labour market in which there are rapid shifts in demand for higher skills, brought on by economic restructuring, younger female workers who are not as well educated as their male counterparts find it necessary to make up for missed educational opportunities through continuing education. Experienced in the labour market, working adults can identify the education opportunities required to keep themselves abreast of vocational demands in a changing work environment. Continuing education provides the ideal mechanism for working adults to update their knowledge and skills without paying the high opportunity costs associated with quitting their jobs. The over-representation of younger and single workers in continuing education is consistent with standard human capital theory. Young workers invest in continuing education more than older workers because their opportunity costs are lower and the length of time before retirement is longer, allowing for greater opportunity to reap the benefits of the training. Single workers invest more in continuing education because the opportunity costs associated with their time are typically lower than is the case for married workers. Motivation for participation in formal lifelong learning is balanced between the self-actualizing factors of "self-development" and "cognitive interest", and the pragmatic considerations of "job change" and "professional advancement". In terms of occupation, the majority of the learners are engaged in the fast growing tertiary industries. Since there have been large employment shifts from the secondary sector to the tertiary sector, training in the tertiary industries is required in order to equip the workers with newly required skills. It also reflects the fact that blue-collar workers are not keenly interested in attending continuing education, or that "continuing education is not an important part of their culture" (Chan and
Holford, 1994, p. 82). However, workers released from shrinking secondary industries often become and stay unemployed because of the mismatch between the skills they possess and those required by employers (Lee, 1996, p. 118). The government should undertake a more proactive role, encouraging workers in these sunset industries to equip themselves with new skills in anticipation of changes as there are strong economic implications for investing in lifelong learning, both for the individuals involved as well as the broader society.

**IMPLICATIONS FOR PEOPLE AND THE SOCIETY**

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

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

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

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

IMPLICATIONS FOR GOVERNMENT POLICY

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

With strong demand for lifelong learning, and continuing education in particular, and little competition from government funded programs, many private institutions have been attracted to the sector. An official estimate of part-time study activity in 1992 identified 750,000 persons taking part (see Chan, 1992), and it was estimated that the volume of trade in continuing education amounted to HK$2.6 billion (see Chan and Holford, 1994, p. 75). In 1993, the non-HEIs placed 2,579 advertisements for students, while overseas educational institutions advertised 2,280 times (Chan and Holford, 1994, p. 53). The market share for private institutions offering continuing education courses is much larger than that managed by the HEIs. However, the lack of government regulation and control on the private education providers compromises quality and raises questions about workers' skills levels. The government should be more active. A good start would be the implementation of standards and
regulations to protect consumer rights of lifelong learners while guaranteeing the quality of worker skills.

It is worth highlighting that the least educated adults in Hong Kong are among those who are least likely to take advantage of lifelong learning opportunities. The better educated members of society have successfully demanded more educational opportunities, mostly geared to meeting their own needs. If this pattern continues, the gap between the well educated and the poorly-educated will become even wider (see Advisory Council for Adult and Continuing Education, 1983, p. 277). The notion that continuing education "is a side issue, a peripheral activity, is now out-of-date and should be revised" (Lai, 1967). At the Conference of Continuing Education Administrators in 1967, it was noted that "grown up people of all levels of education should have as much right to receiving continuing education as younger people have a right to primary, secondary or university education" (Lai, 1967). In considering the social benefits and spillover effects of continuing education, it is critically important to create a shift in attitudes, particularly among the less well-educated, to engender the view that lifelong learning is a continuing and critically beneficial process in life. The government is in the best position to take up the role for promoting and organizing a "community lifelong learning campaign".

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

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