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Resource Mobilisation Strategies for the Education of Adults and the Influence of International Organisations[7]

Abstract: Mobilisation of resources for the education of adults is a crucial factor in determining who gets what, when and how. Existing research discusses a strong influence of 'neoliberal policies' of international organisations on national policy choices, making it difficult for states to address the needs of their populations.

This paper analyses the policies of four states – two OECD and EU Member States: Denmark and Germany, and two states working closely with the World Bank: India and Tanzania – to respond to the following questions: How do states mobilise resources for the education of adults? How are these strategies shaped by international organisations?

The paper argues that international organisations offer benefits that states usually choose to accept. In situations where the states might try to avoid aligning their policies with those of the international organisations, *policy linkages* act as a barrier. In most cases, these organisations do not intervene directly on how to mobilise resources but nudge policy choices through measurements, statistics, projections, recommendations for future policy formulation and the like. Contextual considerations and path dependency (policy choices of the past), rather than the influence of international organisations, are usually the most relevant factors for national policy choices.

Keywords: Education of adults, strategies for resource mobilisation, international organisations, path dependency, contextual factors

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Strategije mobilizacije resursa za obrazovanje odraslih i uticaj međunarodnih organizacija[8]

Apstrakt: Mobilizacija resursa za obrazovanje odraslih ključni je faktor u oodređivanju raspodele: ko dobija šta, kada i kako. Postojeća istraživanja ukazuju na snažan uticaj „neoliberalnih politika" međunarodnih organizacija na oblikovanje nacionalnih politika, što državama otežava da adekvatno odgovore na potrebe svog stanovništva.

U ovom radu analizirane su politike četiri države – dveju članica OECD i EU: Danske i Nemačke, i dveju država koje blisko sarađuju sa Svetskom bankom: Indije i Tanzanije – kako bi se odgovorilo na sledeća pitanja: Kako države mobilizuju resurse za obrazovanje odraslih? Kako međunarodne organizacije oblikuju te strategije?

U radu se ističe da međunarodne organizacije nude pogodnosti koje države uglavnom prihvataju. *Povezanost politika* postaje prepreka u situacijama kada države pokušavaju da izbegnu usklađivanje svojih politika sa politikom međunarodnih organizacija. Iako ove organizacije u većini slučajeva ne utiču neposredno na način mobilizacije resursa u državama, one podstiču odabir politike uz alate kao što su merenja, statistika, projekcija, preporuka za kreiranje budućih politika i slično. Ipak, ključni faktori za nacionalni odabir politika su pre svega kontekstualni uslovi i putna zavisnost – odnosno, politike odabrane u prošlosti – dok je uticaj međunarodnih organizacija sekundaran.

Ključne reči: obrazovanje odraslih, strategije za mobilizaciju resursa, međunarodne organizacije, putna zavisnost, kontekstualni faktori

Introduction

The influence of international organisations on national policy choices regarding adult education is evident through research (Breyer & Schemmann, 2018; Crossley, 2019; Dakowska, 2022; Ehlers, 2019; Field, 2018; Singh et al., 2022). While the OECD and the EU have been shaping national policy choices and contexts in their member countries, the World Bank (WB) has been doing the same in low– and middle-income countries (Ehlers, 2019; Singh et al., 2022; Singh, 2023; Singh et al., 2023b). All three organisations have clear policy agendas and abundant resources (both financial and non-financial resources including expertise, data, time used to find the solution to a particular problem and the

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like) to promote their policies (Singh et al., 2022, 2023b). Since the 1960s, when the OECD was established and the WB began its mission to curtail poverty, the two organisations have shaped the education of adults (Singh, 2023).

During the 1960s and 1970s, when OECD countries were struggling with structural changes in the economy and tried to cope with ad-hoc adult education programs, the OECD pushed *Recurrent Education* and *Lifelong Learning* onto the policy agenda in 1973 (Kallen & Bengtsson, 1973; OECD, 1976). The proposal included *micro-level* strategies for mobilising resources to support the individual but huge costs for the state, as well as other stakeholders (Singh, 2023). Only a few OECD countries managed to implement them owing to the ensuing oil crisis and related economic problems (Schutze & Istance, 1987). Consequently, education of adults remained ad-hoc in most OECD countries with a preference for vocational offers that seemed comparatively more rewarding for all stakeholders in terms of *returns on investment*. In the late 1980s, the OECD proposed a second set of strategies, this time *macro-level* solutions, to mobilise resources for supporting the implementation of the previous micro-level strategies (Schutze & Istance, 1987). The idea was to ensure cost-sharing among the stakeholders (state and social partners) and create provisions for borrowing funds for investments in lifelong learning (Schutze & Istance, 1987). Due to the complexity of the solutions, the strategies were partially implemented in OECD countries, including EU Member States (OECD, 2001). In 2000, the OECD finally came up with a more concrete strategy of co-financing (cost-sharing among stakeholders) and a stronger role for the state as the regulator of the provisions and the provider of resources for individual learners who were unable to pay and lacked support from other stakeholders (OECD, 2001). To alter the preference for vocational offers and the imbalance among offers created thereby, the OECD developed certain rationalisation provisions, including assessment and recognition in non-formal settings, transitions from teacher-centric to learner-centric systems, increasing participation, and indicators to broaden the calculation of returns (adding non-economic aspects) on investment in education for adults (OECD, 2004; Singh, 2023). The EU promoted it by funding Member States to develop lifelong learning strategies, especially between 2007 and 2014, followed by Education and Training (ET) Monitors and European Semester recommendations to keep a check (Singh et al., 2022). As discussed in the paper, the OECD proposals are clearly reflected in the EU, Danish and German policies and the EU influence is evident in the policies of the two countries.

Since 1962, the WB has been actively involved in advancing education in low– and middle-income countries as a contributing factor for development

(WB, 1971). WB's heavy infrastructural investments in these countries led to the need for skilled local manpower but the provisions, as well as resources (including infrastructure, funds etc.) were lacking (WB, 1971). Thus, starting from investments in infrastructure in the 1960s, the WB gradually moved in the 1970s and 1980s towards promoting formal vocational education in areas with infrastructure (for instance urban areas) and non-formal vocational education projects in areas without or with limited infrastructure (for instance rural areas) to meet the manpower needs at minimum costs (WB, 1971). Since these countries were (and still are) often reporting lack of adequate resources, the WB provided financial and non-nonfinancial resources (like expertise) in cooperation with other organisations, such as the UN (Singh, 2023). WB studies in the 1980s showed that education in these countries was primarily accentuating inequality, because, while few were getting access to the most advanced educational opportunities, the rest were even deprived of literacy (WB, 1980). Furthermore, investments in primary education and gender parity seemed to provide maximum returns on investment in education according to the WB, leading it to argue that scarce resources should be channelled in low– and middle-income countries towards primary education and gender parity while the rest of education provisions should be left to private financing (individuals, market, and civil society) (Haddad et al., 1990; Psacharopoulos & Woodhall, 1985; WB, 1991, 1999). The policy was further promoted through the *Millennium Development Goals* and the *Global Partnership for Education* (WB, 2011). Consequently, education for adults was left to depend heavily on private financing in most low– and middle-income countries (Singh, 2023). This impacted the type of offers available and chosen, because private financing often expects concrete economic returns, and led to the development of a non-formal sector of education for adults with vague norms and limited quality (Singh, 2023). Since 2011, the WB has changed its stance and has been promoting lifelong learning (WB, 2011, 2018, 2019, 2021) but the gradual underfunding of education of adults over decades means that changes in favour of public financing of education or systematic cost-sharing by other stakeholders (like employers) are difficult to achieve in these contexts. This is reflected in the Indian and Tanzanian cases.

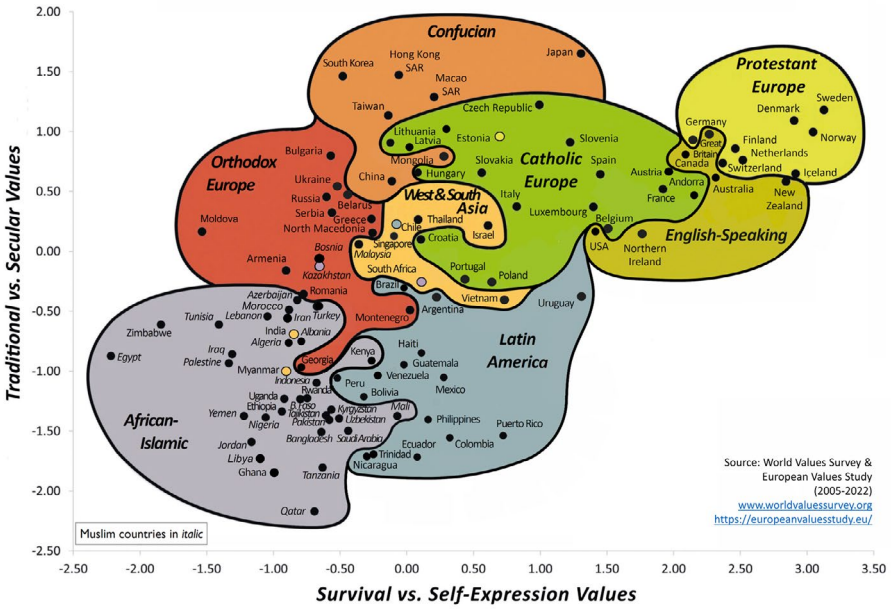
Conceptual Framework

Contextual factors play an instrumental role in shaping the policies of any state. *Path dependency* is one such factor; it implies that once a certain policy choice is made, it has long-term consequences for further policy choices (Singh, 2024). A specific policy choice may render certain possibilities (un)available for

policy actors (Singh, 2024). For instance, accession to the EU provides a country with access to the European internal market but at the same time, it must accept EU internal market regulations. The four cases discussed in the paper reflect how path dependency has shaped national policy choices with both positive and negative consequences.

A mapping of relevant contextual factors was conducted by Inglehart and Welzel (World Values Survey, 2023). They have mapped states according to: 1) traditional vs. secular-rational values; 2) survival vs. self-expression values. The map shows that low– and middle-income countries – India and Tanzania – are comparatively traditional, collectivist and focusing less on individualism, Germany is comparatively individualistic, less traditional and less survival-oriented,

Figure 1. Inglehart-Welzel World Cultural Map 2023



Source: World Values Survey, 2023. (e.v.).

* Please note that India is mentioned in cultural zone to which it does not belong. It is neither African nor Islamic but rather South Asian and Hindu. The exception is therefore marked differently with yellow dots to show a mismatch with the nomenclature of the cultural zone and is not relevant to answer the research questions in the paper. Further, there is no better alternative available as per the knowledge of authors. For details, please see: World Values Survey. (e.v.).

while Denmark is the most individualistic and the least survival-oriented. This can largely be attributed to availability of resources (maximum in Denmark) and focus on better opportunities for the individual.

Contextual factors influence the availability of resources, which form the core of policy choices. Schuetze (2009) proposes two relevant considerations to analyse this: 1) What are the policy priorities? 2) Who is paying for what? (Schuetze, 2009) Based on this, Schuetze proposes three policy models for financing lifelong learning (adapted in the paper as resource mobilisation for adult education): 1) the *Social Emancipatory Model*; 2) the *Mixed State-Market Model*; and 3) the *Human Capital Model*. education for adults

The *Social Emancipatory Model* aims at providing learning opportunities to all where the state bears the responsibility for providing resources and access to all. In the *Mixed State-Market Model*, opportunities are available to those who can afford and want to avail themselves of them. Individuals are responsible for identifying and availing themselves of opportunities while the state needs to remove the barriers for participation. In the *Human Capital Model* opportunities focus on developing human capital for the labour market, the individuals have the responsibility to choose the learning pathways and must bear the consequences of their choices. Thus, most individuals choose offers aimed at employability or productivity and expect calculable returns on their investment. While the OECD proposals (subsequently adopted by the EU) changed from the *Social Emancipatory* (the idealistic notion coming from Sweden in 1969) to the *Mixed State-Market Model* (realistic, implementable model) as the state could not bear all costs, the WB proposals have primarily promoted the *Human Capital Model*, with private financing being the most relevant resource mobilisation strategy for the education for adults.

To influence national policy choices, organisations such as the OECD, the EU and the WB, have been using various *policy instruments* which can be categorised as *sticks* (punishments), *carrots* (benefits) and *sermons* (data, information, advice etc.) (Vedung, 1998). Further, they often propose *policy packages* or *policy clusters* (a number of small interlinked strategies or policies), which implies that choosing or rejecting one policy option might have consequences for other policy areas as well. These interrelationships among policies are called *policy linkages* (Singh, 2024).

The cases discussed in the paper show why certain resource mobilisation strategies are adopted in various contexts and how international organisations might influence them.

Cases

Denmark

Denmark is a high-income EU, OECD and Nordic country with knowledge-based economy and a small population of about 5.8 million, highly dependent on international trade and a huge service sector (OECD, 2021). Since there is lack of free labour, negligible unemployment, high labour participation, and an ageing population (Statistics Denmark, 2008), employers have difficulties in filling jobs. Denmark excels on most EU indicators wherefore the EU often has limited recommendations for it (EC, 2023a, 2023b; GoD, 2023). In fact, its education system is considered to be highly inclusive, flexible, and resilient (EC, 2023a, 2023b; GoD, 2023; OECD, 2021).

Danish society is highly organised and social partners (trade unions or associations of employers and employees) play a major role in policy decisions through tripartite negotiations among state and social partners (Singh et al., 2022).

Employers and social partners pool their funds for the education of adults in the *competence funds*. The use of these funds is decided through tripartite negotiations, in which the social partners play a decisive role through *bargaining*, with the state in the back seat. Social partners are guided by the interests of their members, i.e., employers and employees. This implies that individuals, who are not represented by any social partners (non-members irrespective of their activity in the labour market) or are represented by social partners who are not influential enough (e.g. several part-time employees and immigrants), do not get the best outcomes of these negotiations and bargaining. On the contrary, those represented by strong social partners (e.g. the high-skilled) often gain in such bargaining and the funds are often utilised in ways providing them with more opportunities and favourable conditions than others.

The major function of the state is to make laws and provisions that remove barriers against participation (Singh et al., 2022). Even though the state does a lot in terms of supporting the comparatively weaker sections of society in other policy areas, its role has deteriorated in promoting the education of the low-skilled, the unemployed, immigrants, and older adults.

The *providers* of education for adults also play a decisive role not only by providing learning offers, but also by validating the individuals' prior learning before allowing them to avail themselves of a specific learning opportunity (Børne – Og Undervisningsministeriet, n.d.). In most cases, they receive payments from the *competence funds* or other stakeholders. The longer and complicated the

offer, the better the returns for the provider. Thus, the validation of prior learning is often biased and in favour of the provider's interest, while the interest of the employers or the learners become secondary. Further, since the providers are competing, they tend to maximise profits. However, the competition is regulated (*imperfect competition*) and only specific providers are recognised by the social partners. The ongoing debate about reforming the validation system to curb the influence of providers is at stuck in the tripartite negotiations at present. It usually impacts the high-skilled less as they have formal certification, but the rest are often at the receiving end.

Since Denmark has a highly individualistic society, individuals are free to make their own decisions but the high-skilled usually have better opportunities than disadvantaged (low-skilled, unemployed, part-time workers, retired, immigrants and the like) learners (Rasmussen, 2018). This situation has in fact led to an increasing *Matthew Effect* (Singh & Ehlers, 2024). While the overall participation of adults in learning has increased from 38.6% (2011) to 49.7% (2021), the participation of disadvantaged learners has been constantly falling from 25% (2010) to 14% (2023) (Arbejderbevægelsens Erhvervsråd, 2023; EC, 2022a, 2023a, 2023b; Singh et al., 2022, 2023a; Singh & Ehlers, 2024).

The Danish model closely mirrors the OECD proposals for cost-sharing. It is predominantly closer to the *Mixed State-Market Model* albeit different as well due to the dynamics of the social partners and providers and the state's backseat role. It could therefore be termed more precisely as the *Mixed Social Partner-State-Market Model,* which is common in Nordic countries and reflects their situation more precisely. The situation in the past was, however, different, especially during the 1970s and 1980s, when the state tried to pay all costs for all learning throughout life, but finally withdrew due to the excessive cost burden, thereby limiting its support to disadvantaged adult learners only (Ehlers, 2019; Singh et al., 2022). Elements of the Social Emancipatory Model are, however, present since the state pays for those who are not supported by any other stakeholders or pay for themselves (Ehlers, 2019; Singh et al., 2022). Individuals are never left on their own, without any possibilities to learn and this is reflected in Denmark's high position on the Inglehart-Welzel Map (2023), rendering major importance to *self-expression*. It is reflected in policies as well.

The debate about what is (not) relevant for the labour market has gained ground in Denmark in the recent decades (Singh & Ehlers, 2024). However, high regard for individual identity in Danish culture, rendering interpersonal behaviour at the workplace an important consideration, has diluted the line between vocational and non-vocational skills. Digitalisation further accentuates

this and whether or not certain offers promote employability is becoming irrelevant. Further, owing to negligible unemployment and limited human capital, the Human Capital Model is the least relevant one in the Danish case. Focus on enhancing human capital productivity is reflected in the high participation in learning in Denmark.

Even though the EU highlights the relevance of providing learning in favour of green transition, it appreciates the Danish model in most cases and uses *sermons; sticks* and *carrots* are not relevant in the Danish case (EC, 2022b, 2023a).

Germany

Germany is a high-income EU and OECD member country, one of the largest high-tech exporters and the biggest manufacturer in Europe. It therefore relies heavily on skilled workers who can endeavour frequent technological upgradations to stay competitive. However, it is facing a major skill gap, especially owing to digitalisation and technological upgradation (EC, 2023c). Furthermore, the ageing German population and the challenges of integrating immigrants are burning issues.

Fourteen of Germany's 16 territorial units provide the right to *paid education leave*. There need not be any relation between the learning and the occupation of the individual to exercise this right (DGB, 2022; Saarland, 2019).

Because of an investment gap in education, shortage of skilled labour, specific company needs, availability of funds for investment, and promising returns for profit, companies invest the largest share (48%) in the education of adults (BMBF, 2022; EC, 2019a; Seyda, 2018). This, however, does not cover all the costs and the state reimburses some of the costs like travel, through tax returns for company-based education (DGB, 2022).

Yet, most state initiatives aim at averting unemployment (due to structural changes in the economy, technological upgradation and the like), supporting the low-skilled and the unemployed for optimal utilisation of available human resources through educational vouchers (which provide learners with possibilities to choose courses relevant to their occupation), further education, paid educational leave, and integration of foreigners for various (economic and non-economic) reasons (BMAS, 2021; BMBF, n.d., Bundesgesetzblatt, 2023; EC, 2022, 2023d, n.d.; Wuppertaler Kreis e.V., 2023). The state allocates funding through various channels, including adult learning centres (*Volkshochschulen*) where it roughly covers about one-third of the total costs directly from the budget and about one-third through allocated funds, including EU funds

(BMBF, 2022; Huntemann et al., 2021; Meisel & Sgodda, 2018; Nuissl & Pehl, 2000; Robak, 2015; Singh et al., 2022).

Individuals are responsible for availing themselves of the learning offers while the costs might be reimbursed partially or completely by different stakeholders though vouchers, scholarships, different schemes, paid education leave, tax refunds and et al (BMBF, 2022; Meisel & Sgodda, 2018; Nuissl & Pehl, 2000). Possibilities for reimbursement are higher for the high-skilled and offers oriented towards the labour market (BMBF, 2022; Bundesagentur für Arbeit, n.d.; Nuissl & Pehl, 2000; Singh et al., 2022). Churches and other philanthropic entities offer opportunities with public or acquired funds at minimal or no cost for individuals (Horn et al., 2023). Costs for part-time formal higher education degrees (if scholarships are not available) and about one-third of the costs in publicly funded adult learning centres are borne by individual learners (Faulstich & Oswald, 2010; Meisel & Sgodda, 2018). Immigrants may have to pay part or the entire costs depending on their residence permits, employer policies and et al (BAMF, n.d.; Bundesagentur für Arbeit, n.d.).

Social partners advocate laws, possibilities and resources for the education of adults based on the needs of their members, often aligning with EU programmes, but do not share the costs (Seyda, 2018).

Despite a very high percentage of adults *showing interest* in participating in adult learning, not all of them avail themselves of adult education (e.g. only 1–2% employed adults actually participate out of the circa 77% who show interest) due to challenges such as unavailability or complexity of finding the relevant offers; personal challenges such as managing family responsibilities; limited awareness of the relevance and availability of offers; unequal opportunities for pensioners, the unemployed and part-time workers; seeking offers not perceived as relevant for the labour market; tax rebates applicable only for those who earn enough to pay tax; structural underfunding of public offers, et al (BIBB, 2019; BMBF, 2022; DGB, 2022; Faulstich & Oswald, 2010; Meisel & Sgodda, 2018; Mohajerzad et al., 2022; Pfeiffer, 2019; Seyda, 2019; Singh et al,. 2022). Since several publicly funded institutions, like adult learning centres, get partial funding from the state, they often compete for customers and are thus often demand driven, which, in turn, leads to offers aimed at employability and productivity (Meisel & Sgodda, 2018).

The EU has highlighted an investment gap in education (including infrastructure, especially for digital transformation) and educational disparities (affecting immigrants, older adults, unemployed and part-time employed, people on the verge of losing employment because of lack of skills needed in the evolving labour market) (EC, 2018, 2019a, 2019b, 2022c, 2023c, 2023d). The EU recommends 1) green transformation and increased participation in lifelong learning;

2) upskilling, reskilling, and social inclusion; and 3) addressing the investment gap in education by increasing public investment and mobilising more resources (Hüttmann, 2020). It offers *carrots* in the form of loans, funds for projects, grants, scholarships etc. and *sermons* in the form of statistical data, evidence-informed policy recommendations, evaluations, and the like. Non-alignment with EU policies might lead to poor evaluations and loss of other opportunities offered by the EU, wherefore Germany tries to avoid it. Therefore, *sticks* exist but they are hidden. In response to EU recommendations, Germany has thus strengthened the architecture and ecosystem for learning (including supporting areas such as transport, digitalisation, and green transformation) including laws; regulations; sectoral integration through various platforms; modernisation of vocational education and training by integrating AI-supported processes and learner-oriented programmes (BMWK 2023; Federal Ministry of Finance, 2022; Hüttmann, 2020). However, it is still lagging in investments to match the EU average (EC, 2019a).

Even though the EU is more vocal on shaping policy priorities, it is silent on how resources can be mobilised; however, the way Germany exercises its option to do so reflects the OECD's cost-sharing proposal. Education for adults in Germany is primarily oriented towards the labour market and provides better opportunities for those who are already employed, because it is easier to mobilise resources for them (e.g. only they can avail themselves of tax benefits). The state tends to remove barriers against participation in learning and the EU promotes the same, but the individuals are ultimately responsible for availing themselves of the offers and looking for reimbursements (EC, 2018, 2019a, 2019b, 2022c, 2023c, 2023d). Thus, the predominant model in Germany is the *Mixed State-Market Model* followed by the *Human Capital Model*. Traces of the *Social Emancipatory Model* can be seen in the German system too; they aim at inclusion (BMBF, 2022; BMWK, 2023; EC, 2023c).

India

India, the most populous country (a quarter of the global population lives in it), has a huge informal economy (90% people working in the informal sector with limited regulations and contracts), high unemployment, the largest number of global non-literates (circa 37%), a lower middle-income economy with a very complex system of graded socio-economic inequality[9] (Singh et al., 2023b;

[9] This implies that almost everyone gains, and everyone loses in such a structure by maintaining their social or economic (or both) privileges over the others and by being dominated socially or economically (or both) by others.

Singh, 2024). It is the highest recipient of WB's assistance (including loans, aid, project funds etc.) across different policy areas (Singh et al., 2023b).

The largest share of the costs for education (including of adults) is borne by individuals and their families. On average, a typical Indian household spends about half of its annual consumption expenditure per student on accessing professional education (Choudhury & Kumar, 2022). The state subsidises education in several higher education institutions and funds adult education programmes, but its share is negligible compared to the education market in India. Total expenditure on higher education amounts to about 1.05% and on adult education to about 0.01% of government expenditure (GoI, 2023a; Schiller et al., 2023).

Company-based education in India accounts for the largest share because the percentage of students in skilled education is very low and most jobs in India need some kind (recognised/unrecognised) competencies (GoI, 2023b). It is difficult to obtain data about informal organisations since transparent reporting mechanisms are not necessarily in place for the informal sector in India. About 86% of the working age population (15–59 years old) did not receive any formal training, which means that they were trained on the job. In private organisations, especially when they are not necessarily regulated by formal provisions, investments in learning often ensue when the employers have prospects of profitable returns. Thus, employers may offer individual learners (employees) contracts with payback clauses to recover their costs and binding them to work under specific conditions favouring the employers, which can negatively impact their learning opportunities due to high work pressure and ultimately result in them paying much higher learning costs (e.g. longer working hours, lower wages) whilst amassing profits for their employers (GoI, 2023a). Further, companies provide learning opportunities under Corporate Social Responsibility and avail themselves of tax benefits in return.

Apart from the tax rebates to corporations, the state may fund civil society organisations, but this is quite selective and meagre. The state subsidies higher education, skill training and adult education. About 58% of the higher education institutions are private, and skill development is often provided through private institutions accredited by (and thus affiliated with) public authorities. Adult education (literacy and basic skills) is free, but the learners have to bear the other costs, such as travel costs, forgone income during learning hours et al (Choudhury & Kumar, 2022; Schiller et al., 2023). Civil society organisations are funded by both state and non-state institutions; in the recent years, the state has not only been cutting down its own funds but also making it difficult for these organisations to receive funds from other sources (Asian Development Bank, 2023). Although a large number of civil society organisations focus on education in the country (Asian Development Bank, 2023), there are no data about concrete costs and contributions to or from them.

The Indian policy on education and skill development clearly highlights that the objective of education is to promote employability, economic growth and development (GoI, 2020). It makes sense in a country where the government has to provide free food to about eight million people and data about poverty are vague (WB, 2021; Iqbal, 2023). Thus, it is evident that India aspires for economic growth and better livelihood opportunities for individual learners. The WB's 2018–2022 CPF (Country Partnership Framework or policy packages across policy areas with diverse policy linkages) clearly mentions and promotes the same through *carrots* (loans, projects etc.), *sermons* (data, recommendations, case studies etc.) and *sticks* (sometimes poorly evaluating, halting the agreed funding under certain projects and so on) and argues for investments to develop human capital and increase labour force participation, especially though private financing (WB, 2018). Data from the WB and other international organisations like the ILO (Ghose, 2024) plays a major role in shaping critical narratives against the policies because most public data is (mis)managed, not revealed, or reported vaguely. Further, organisations are usually afraid to reveal information and the state control over information has been growing immensely since 2014.

Since the major thrust of education for adults in India is on the development of human capital and individuals bear the largest share of costs, as well consequences, the *Human Capital Model* is the most predominant one. The *Mixed State-Market Mode*l follows as the state regulates and the market predominates (currently with a major trend towards privatization and, in fact, crony capitalism), leaving the individual with the responsibility to compete and avail themselves of the available offers.

Some elements of the Social Emancipatory Model can also be identified in the education policy in general, for instance, in special schemes for the socially marginalised, or for females etc. but this is not necessarily reflected in adult (second chance) education because the government has cut down on funding for it, leaving it in jeopardy with considerable costs for the learners and managing statistics using non-diversified data on education (GoI, 2020; NLMA, 2023; Singh, 2024).

Tanzania

Tanzania is a low-income country with a population of around 61 million (URT, 2022). The surging population, especially the youth, keeps straining the country's economic and social infrastructure, due to which the provision of adequate quality services to the masses, including education, is a major challenge (URT, 2008). The economy needs high– and semi-skilled human resources for raising Tanzania's low-

income status to at least middle-income status by 2025 (URT, 2000; URT, 1999). The education sector is heavily burdened by the need for sufficient resources and facilities and to contribute to national development (Carnoy, 2006; Charles, 2021; Komba, 2017; URT, 2014). Consequently, the state and other national and international stakeholders are prioritising investments in the development of human capital and adequate infrastructure (URT, 2000; WB 2018).

The education policy in Tanzania is therefore, embedded in the development framework, aiming at Africanization (in response to former colonization), nation building, addressing social challenges, and economic growth (Nabudere, 2006). Tanzania aims to increase labour force participation and social inclusion through adult education (URT, 1999, 2010, 2018; URT, 1995, 2014). Thus, skill development and work-based learning acquire a central position in the policy landscape geared at boosting overall national development (URT 2000, 2014). Adult education aims at inclusion through second chance education, including literacy and basic skills; its objective is to include everyone in the development process.

Even though higher education is mentioned as the state's responsibility, individuals and their families bear the largest share of costs for their education on their own or through private education loans, a large share of which are organised by the state (URT, 1999, 2014; Komba, 2017).

Collective groups and international organisations share the costs primarily by investing in large projects connected with the educational reform (WB, 2018, 2021). International organisations aim at bridging the investment gap in education because investments from the state, as well as from individual learners, do not suffice to cannot the costs of developing human capital needed for the labour market (WB, 2011, 2018).

WB's policy focusing on human capital and encouraging private financing of education is clearly reflected in the Tanzanian policy (URT, 1999, 2000, 2014; WB, 2018). The benefit of the alignment is reflected in WB's allocation of about US$ 300 million to fund higher education reform (WB, 2018). Even the WB's social inclusion agenda aims at enhancing labour force participation in boosting national (especially economic) development.

The *Human Capital Model* predominates since adult education is primarily considered an economic growth instrument in Tanzania, is privately financed and is the individual's responsibility. Given that the state tends to contribute towards removing barriers in participation (Komba, 2017), there are elements of the *Mixed State-Market Model* as well, with market providers playing a predominant role. It is, however, difficult to find elements of the *Social Emancipatory Model* in Tanzania although there is a pressing need for it.

Discussion

A comparative analysis of the four cases shows that the policy objectives for the education of adults and strategies for their achievement in a country are largely shaped by the availability of resources and the way they are mobilised.

Stakeholders who pay, tend to get their interests satisfied. In the case of Denmark and Germany, the *Matthew Effect* is increasing because the social partners in Denmark and single private companies in Germany focus on the education of the high-skilled to increase productivity. This is understandable from the perspective of these stakeholders: the social partners who work to secure the interests of their members in Denmark, and the private companies that work to maximize profits in Germany. Since the state in both countries has abundant resources, it also pays directly or indirectly for the individuals and facilitates their participation. High regard for individualism in the Danish society supports the *Social Emancipatory Model* and the affluent state largely translates it into reality by paying for those who cannot get support elsewhere and are unable to pay for themselves. In Germany, the investment gap highlighted by the EU stresses the need for state investment to ensure access to quality learning opportunities for all. Huge private companies are among the driving forces of the German economy and, thus, one of the most influential actors in providing the education for adults. The *Matthew Effect* in Germany does not arise because some are kept out at the cost of others, but just because the German state is unable to compete with the private companies in terms of investments in learning opportunities. The share of state investment (as opposed to investments by private companies) in learning opportunities is higher in Denmark than in Germany. Both Denmark and Germany have succeeded in ensuring access to basic education for everyone and their education systems have long been working to provide opportunities after secondary education. Education of adults has therefore, developed primarily as a fourth sector in these countries, focusing on further and continuing education, just like in many other OECD countries.

In India and Tanzania, basic education, and even literacy is a challenge and both have predominant survival values although Tanzania is even more traditional than India. Both prioritise collectivism and better economic growth for the country rather than individualism. *Inglehart-Welzel's Cultural Maps* thus explain why they have a similar predominant *Human Capital Model*. The state does not commit enough resources for education for various reasons, including lack of resources. These countries rely on private financing to bridge the investment gap for providing even basic education and access to all. Consequently, individuals bear the costs for their education and if they cannot, they can rely on negligible

support from other stakeholders, except loans and payback provisions in the private sector. Since private financing is profit-oriented and aligned with the *rate of returns on investment*, individuals are directed to focus on employability in education for loan repayment, social mobility, and achieving comfortable living conditions. Accordingly, employability-oriented courses are in high demand and are thereby predominantly offered, while other courses not directly relevant to the labour market have low priority.

It is, however, interesting to note that even though there can be more than one way to address the different challenges in the four countries, there are similarities among the two OECD-EU member countries – Denmark and Germany, and the two non-OECD, non-EU countries closely cooperating with the WB – India and Tanzania.

Contextual factors and path dependency indicate why the two OECD countries managed to develop the education of adults as further and continuing education, while the two non-OECD countries needed to develop a parallel system of second chance education, leaving the education of adults primarily to private financing. Further, the role of the WB and the EU-OECD has been instrumental in shaping the policies of the four countries due to the strong policy linkages spread along several policy areas.

The current education policies of India and Tanzania mention focus on employability clearly, a view backed by the WB. The WB CPFs for the two countries prioritise employability-oriented education and enhancing labour force participation for inclusive development. The WB supports this by providing financing opportunities (*carrots*) and policy advice, data, good practice case studies, advocacy and the like (*sermons*) across policy areas. Data from organisations like the ILO further supports the same. Since the resource scarce countries gain resources and invest limited resources in research, expertise, and experimentation, they tend to follow the advice of key international organisations based on readymade *evidence-informed* policy solutions. The respective costs for rejecting it could be high (losing *carrots* or attracting *sticks*). On the other hand, the EU countries align their policy priorities with the European Semester recommendations and are closely monitored through ET Monitors. While the WB has shaped the way resources are mobilised (left to private financing) in the two low– and middle-income countries, the EU is mostly silent on how the resources should be mobilised. The OECD guidelines on cost sharing are reflected in the policies of the EU countries.

Schuetze's three models are relevant for explaining the situation, with the exception of Nordic countries because of the increasing influence of social part-

ners. Thus, the *Mixed State-Market Model* can be modified to the *Mixed Social Partners-State-Market Model*.

Conclusion

The EU-OECD influence on Denmark and Germany and WB's influence on India and Tanzania is clearly reflected in their policies. Even though these organisations do not necessarily steer national policy choices and a lot depends on the domestic milieu and path dependency, there is limited room for the countries' non-alignment owing to close monitoring, lucrative offers, readymade policy solutions offered ahead of time, risk-aversion due to experimentation, policy linkages, et al.

The immense resources (including expertise, data, time for research, infrastructure etc.) of these organisations position them quite strongly in policy formulation, as compared to the states. For instance, in 2004, the OECD not only proposed cost-sharing guidelines but also supplemented them with a whole architecture comprising measurements and evidence-informed policy instruments to convince various stakeholders to implement them. This 'ahead of time' proposal helped the EU maintain silence on how the resources can be mobilised and yet nudge the member states about it through ET Monitors and European Semester Recommendations.

The low-income countries have been encouraged to opt for private financing of adult education under the WB's influence. Aiming at the larger development framework with an instrumental role for education, the WB promoted channelling of funds for universal basic education and gender parity in most low– and middle-income countries, which led to the underfinancing of adult education by the state; the governments found the opportunity to align with the trend, giving way to the market and benefitting from it. The consequences of WB influence, in this sense, have been negative for the individual learners in low– and middle-income countries as it has supported the states' choice to attach lesser priority to public education.

Carrots (benefits) are most common policy instruments in the education of adults. They back *sermons* (recommendations, advice etc.). *Sticks* might be understood as the flip side of the coin, applied when non-alignment with recommendations proposed by international organisations might lead to loss of benefits, as well negative consequences for offers in other policy areas because of policy linkages.

In a nutshell, states might choose to adopt international recommendations if they see the benefits, if their context (including socio-economic conditions, political will, culture, social values, etc.) allows it, and if the options are open for them due to path dependency or previous policy choices. The kind of strategies they choose for mobilising resources determine who gets what when and how, while international organisations remain one of the factors that may (not) influence their decisions if they (do not) let them.

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